

HEALTHY LINE SHOPS FOR LAST-MILE DELIVERY

IMPROVING THE SUPPLY CHAIN TO DELIVER MORE NUTRITIOUS FOOD OPTIONS FOR
TEA PLANTATION WORKERS OF ASSAM



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SUMMARY

Limited access to markets and poor market infrastructure are underlying factors that negatively impact nutrition outcomes for the rural poor in hard-to-reach areas, including communities working on tea estates in India. An innovative and sustainable market-based supply chain model was tested in Assam, India, to improve the nutrition of the tea estate communities. This initiative worked through neighbourhood retail shops, referred to as Healthy Line Shops, to improve the last-mile reach of select nutritious foods, previously inaccessible to many households on tea estates. The pilot model was designed for 12 retail shops across four tea estates in 2020 and was scaled to 32 shops across eight estates in 2021.

This paper reviews how Healthy Line Shops – a market supply chain model – have been effective in increasing the supply of certain nutritious foods for a targeted population of lower-income consumers. Within two years, the model has become an opportunity for wholesalers, distributors, and shopkeepers to expand their business with low investments, demonstrating feasibility and viability. The findings indicate that the combination of an appropriate product basket and capacity building for shopkeepers on efficient trade practices has made a sustainable business model that enhances the accessibility and purchase of safe and nutritious foods among the tea estate communities. This working paper describes the process of conceptualising the pilot intervention, then details the pilot intervention's results and the lessons learned for other efforts to embed nutrition-sensitive innovations into last-mile supply chains in hard-to-reach places.

KEY MESSAGES

- Limited access to markets and poor market infrastructure are underlying factors that negatively impact nutrition outcomes for the rural poor in hard-to-reach areas, including communities working on tea estates in India.
- GAIN and Ecociate, a business consulting firm, tested a unique market supply chain model to address last-mile delivery challenges for nutritious foods (e.g., fortified foods, eggs, and legumes) through Healthy Line Shops on tea estates in Assam.
- A step-by-step approach was adopted that considered each component of the supply chain's life cycle, from agreeing on the products to be delivered, to forming and strengthening supply linkages, to the delivery of the products.
- The model was effective in increasing sales and the turnover of new or promoted healthy food items. Furthermore, the model demonstrated viability and sustainability through the continuation and growth of the business, even amidst COVID-19 lockdown restrictions, and long after the gradual phase-out of support from the project team.
- The model has potential for replication in other geographies.

BACKGROUND AND OBJECTIVE

Limited access to markets and poor market infrastructure are underlying factors that negatively impact nutrition outcomes for the rural poor (1). The potential for nutrition-sensitive initiatives in the food supply has been recognised, yet there is limited data on how market-based approaches can lead to improvements in food access, particularly in the context of hard-to-reach populations. One particularly hard-to-reach group are those who live in tea-working communities in Assam. In this context, households typically live in company-provided housing on land owned by the tea company in rural areas far from main towns (i.e., on the ‘tea estate’). Households thus depend on the retail shops located on the tea estate and small traditional markets for their weekly supply of food. There is limited research on how these food supply chains operate and how they could become more nutrition-sensitive to better support hard-to-reach communities.

India is the second-largest tea-producing country worldwide, and the state of Assam contributes 50% of the country’s annual tea production (2). The state, located in the north-eastern region of India, houses more than 800 tea estates, which collectively employ more than one million workers (3,4). Workers are mostly women between 26 to 45 years and live with their family members in communities on the estate (5). In line with the national Plantation Labour Act of 1951, the general welfare and wage (benefits-adjusted minimum wage) of the workers is provided by the tea estate management (6). Tea estates are characterised by the provision of residential facilities with basic amenities such as electricity, clean drinking water, and toilets. The tea estates also provide access to healthcare services, schools, shops, and subsidised monthly supplies of rice, wheat flour, and tea.

Despite having welfare provisions and tea being one of the largest industries, , malnutrition is a persistent public health problem in tea estates of Assam. Several studies have found low diet quality and poor health status among tea workers in Assam. In one study, 47% of women of reproductive age in Assam were found to be anaemic (7); anaemia is associated with higher maternal mortality, fatigue, and diminished work capacity (8). A baseline study conducted by GAIN found only 34.5% of women workers on tea estates were consuming a minimally diverse diet, suggesting that two in three women were unlikely to be meeting their micronutrient needs—that is, they were not consuming the vitamins and minerals (like iron, folate, zinc, and vitamin A) that are required to build immunity and resistance to disease (9).

Since 2019, GAIN has been leading a Workforce Nutrition programme in Assam to improve both access to and demand for healthier diets in the tea communities¹. As part of this, GAIN co-developed with [Ecociate Consultants](#) a market-based supply chain model to transform neighbourhood retail shops into ‘Healthy Line Stores’ (HLSs). The aim was for the HLS to serve as sustainable supply hubs for selected nutritious foods, the demand for which would be bolstered by community-level campaigns about healthy diets. To better understand the implications of this nutrition-sensitive initiative, this working paper explains the conceptualisation of the market-based model and analyses the pilot intervention’s effectiveness in increasing the supply of safe and nutritious foods. In addition, it discusses the sustainability of the business for the stakeholders.

¹ **Workforce Nutrition** programmes use existing business structures and work with employers to improve the nutrition outcomes of workers, based on compelling evidence that these programmes offer a win-win for both employers and employees. In Assam, tea supply chains serve as an entry point to reach lower-income workers and to convene international tea companies as co-funders. The programme is being implemented in the tea supply chain in Assam, in partnership with the tea estate management, the local tea association, and NGO partners. More information can be found on [GAIN’s website](#).

PROJECT DESIGN AND PILOTING

To inform the project design, a market assessment was performed to understand the market infrastructure on the estates as well as local purchasing and consumption patterns. A supply side model was then conceptualised and tested by GAIN and Ecociate.

MARKET ASSESSMENT

Market infrastructure mapping was conducted to understand the accessibility of nutritious food items on tea estates. This was done through focus groups with female tea garden workers, and interviews with both residential retailers on the estates and wholesalers of nutritious products in the areas around the estates examined. In addition, in a few selected retailers, stocks and suppliers were assessed. The results of the mapping showed that the infrastructure landscape included neighbourhood retail shops (also referred to as line shops); weekly traditional open-air markets or *haat bazaars*²; and the government's free ration scheme under the National Food Security Act³. In addition, learnings from government initiatives were considered to examine the challenges and opportunities that existed in the supply chain environment. One such initiative that served as an example in the development of the pilot was that of the Bagan Bazaar (Tea Garden's Shop), a concept introduced by the government. Bagan Bazar, also known as a nutrition shop, was initiated as a holistic model that would make nutritious food products more accessible to tea workers as well as create an additional source of income for women through self-help groups (SHG). The shop was stocked with nutritious food items like green leafy vegetables, fruits, and grocery items by the SHGs. While the concept was promising, these shops faced major challenges maintaining a consistent supply of nutritious food products. The shops did not have an established wholesale distribution system for food products, like those for small retail shops in residential areas. The SHG members running the shop had to procure the products on their own as well as sell them (10).

Given the challenges of the Bagan Bazar model, ensuring a regular supply of products, along with cost-saving mechanisms in the supply chain, were identified as the two most important elements to be investigated for the sustainability of the programme. The market mapping also revealed that the most accessible points-of-purchase for tea worker households were the line shops in the estates. However, there were also some challenges with the line shops at present. First, the average line shop had the potential to support a customer base of 80-100 households but catered to only 30-40 households. The shop owners also reported that they only stocked preferred food items due to their limited investment capital and the existing credit system they commonly offered to customers. Second, the procurement process was time-consuming and costly. Contrary to the more organised supply chains in India, where the wholesalers supplied the products directly to the shops, individual line shop owners had to procure food items from wholesalers in towns located 20-30 km away. The wholesalers claimed the 'supply at doorstep' system was unattractive and unviable. When interviewed, they cited irregular orders, low order values, high frequency of monthly orders, and poor credit repayment as reasons for not supplying to the line shops. The insights from the market mapping explained the high costs, the

² A *haat bazaar* is an open-air market that serves as a trading outlet for consumers in local areas. Generally, it is organised weekly near the tea estates.

³ The National Food Security Act (NFSA), 2013, legally entitles up to 75% of the rural population and 50% of the urban population to receive subsidised food grains under the targeted Public Distribution System. About two-thirds of the population, therefore, is covered under the Act to receive highly subsidised food grains. As a step towards women's empowerment, the eldest woman of the household, age 18 years or above, is mandated to be the head of the household for the purpose of issuing ration cards under the Act.

limited economies of scale, and the lack of supplies to serve the line shops that service the tea estate communities.

In addition to assessing the link between line shops and wholesalers, the mapping also helped to understand the types of nutritious food items available at wholesalers in the nearby towns. These included fortified food items, lentils, soy protein chunks, and other staple food products. The market assessment also explored food purchase and consumption patterns among the workers. The reported dietary patterns of the workers could be characterised as high in carbohydrates, but low in proteins and fresh fruits and vegetables—foods rich in vitamins and minerals. The workers also had limited awareness about the importance of dietary diversity and the value of consuming fortified food products.

CONCEPTUALISATION OF A NEW SUPPLY CHAIN MODEL

Based on the findings, a life-cycle approach to introducing a new supply chain had to be conceptualised to ensure the model's sustainability, replicability, and feasibility in the tea estate with only limited investment from the shop owners. Insights from the market assessment also helped to craft an incentive-based value system for all the stakeholders involved in the supply chain. The system helped create buy-in from the retailers and motivated them to connect with the project. A step-by-step approach was adopted that considered each component of the supply chain's life-cycle – starting from agreeing on the products to be delivered, forming and strengthening linkages, to the delivery of the products. This is shown in Figure 1.



Figure 1. A life-cycle approach to introducing a new supply chain mechanism in retail shops

- ***Determining the nutritious food basket***

At the outset, it was necessary to curate the contents of a nutritious food basket that could be offered in the HLS. The baskets would be determined based on the insights from the market assessment study on consumption patterns and food preferences of the workers and food availability at wholesalers, and after considering nutrient content and safety, as defined by GAIN^{4,5} (11). This basket would contain fortified cooking oil, pasteurised packaged milk, lentils and pulses, eggs, soy protein crumbs, nuts, vegetables, fruits, and iodised salt.

⁴ GAIN defines a “**nutritious**” food as a food that in the context where it is consumed, and for the individual who consumes it, provides beneficial nutrients and minimises potentially harmful elements. GAIN has categorised nutritious foods into four different types: 1) high inherent nutritional value; 2) enhanced nutritional value; 3) some nutritional value; and 4) source of added nutrients.

⁵ GAIN defines a “**safe**” food as a food that does not contain a contaminant or other attribute that increases the probability of poor health outcomes, in the context where it is consumed and for the individual who consumes

- **Mapping and selection of retail shops**

- The next step was to identify the potential line shops that could supply nutritious food items. It was decided that the project team would map the shops based on specific criteria that included: shop owners with good customer relations, sufficient storage space, daily opening hours, and willingness to stock and sell nutritious food products. The final number of line shops would be selected in consultation with the tea management and would be branded as Healthy Line Shops. The staff of the identified shops would be trained on cost-effective business operations as well as the importance of consuming healthier diets. Additional branding support would also be provided to HLS owners to reinforce the shop's new identity by displaying nutrition awareness messages on the shelf, via posters, and at a one-time promotional event (Pictures 1 and 2).

- **Linking shops with wholesalers (distributors)**

The next task was to establish an efficient supply system from the wholesalers to the HLS. For this, it was necessary to understand the aggregate demand for the products to achieve business viability for the wholesaler. The situation was complicated, as different food products had separate supply chains and there was no wholesaler who stocked all the products that had to be included in the basket. Furthermore, the distance from the wholesaler to the tea estates was also a challenge, as the wholesalers would only undertake the transport of goods and products within a radius of 5-8 kilometres. To overcome this hurdle, the team explored partnering with a demand aggregator, who was centrally located, had their own vehicle for transport, and was willing to invest time and money into the new supply system. This would be a win-win situation for the aggregator, who only had to invest 8-10 days to develop the business, which then became an additional source of income.



Picture 1. Posters and flyers provided by GAIN to create a unique identity for the HLS

it. Foodborne hazards can be biological, chemical, or physical in nature, and food contamination can occur at any stage along the supply chain.



Picture 2: Display racks provided by GAIN to encourage customers to buy nutritious food products

- **Order consolidation**

Subsequently, the demand aggregator, referred to as the HLS distributor, would aggregate the demand from each HLS, source the food products at competitive prices from different wholesalers, and supply the necessary items to the HLS. Ultimately, the process would create a mechanism for the HLS distributor to replenish stocks of nutritious foods at the retailer's doorstep. The project team had planned to map the shops according to the distribution route to ensure efficiency. Furthermore, a plan for training the HLS owners and HLS distributors on business operations was also conceptualised. While the HLS owners would be trained on order quantities, order frequencies, and product inventory management, the distributors would be trained to set up systems for regular supply cycles, volume optimisation, route planning, new product introductions to retailers, and product sourcing.

- **Delivery and transport costs**

The last step was to develop a delivery and transport plan that would be financially viable, and therefore sustainable in a market system. It was envisioned that in the early stages, the HLS distributor would be supported through subsidised transportation costs, covered by GAIN, for doorstep delivery, along with a one-time free supply of nutritious food products. With subsequent increases in business volumes and demand, the transportation subsidy would be reduced and ultimately phased out. Additionally, the project planned to support HLS owners to place orders and aimed to build their capacity to place bulk orders to meet demand by themselves. Initially, only nutritious food items would be available through the system to reinforce the prioritisation of nutrition. Gradually and naturally, however, other staple food products, as well as health and hygiene products, could be included to increase business volume for the HLS distributor and the HLS owners.

After this concept was developed, the pilot was implemented in two phases between 2019-2021. The first phase included 12 HLS owners across four tea estates, with an estimated reach of 1,200 households. In the second phase, the pilot was scaled to include 20 additional HLSs, thus reaching a total of 32 HLSs in eight tea estates with an estimated reach of 3,200 households. The following section outlines the findings from operationalisation of the concept.

PROGRAMMATIC OUTCOMES

The programme was initiated with the first 12 HLSs in September 2019. At the outset, a simple monitoring system was developed using Excel sheets to capture monthly data on orders of all products and every shop, which is the source of the data cited here. Unfortunately, the initial phase of the pilot coincided with the rise of COVID-19 cases in the country, and the first COVID-19-related lockdown was announced in March 2020. This was an unplanned but opportune test of the resilience of the model. Despite lockdowns, the supply chain continued to function in the tea estates throughout the period.

As the distribution system picked up pace, however, it was clear that procurement from 12 HLSs was insufficient to make the HLS distribution system viable from a business perspective. Therefore, in January 2021 when lockdown restrictions ended in the tea estates and systems returned to normal, 20 additional HLSs were identified and included in the pilot. The 32 HLSs provided a bigger pool for the existing distributor and wholesalers, incentivising them to expand their businesses. Around April 2021, once the HLS distributor supply chain was reliable and regular, the project focused on introducing additional staple food items such as iodised salt, legumes, chickpea flour, white peas, and health and hygiene products to the product basket to increase business volume (Figure 2). This leveraged the model by offering greater value for the HLS businesses, which had to rely on less dependable wholesalers for these products. The HLSs started demanding more food products, including staples, be added to the set of foods provided as part of the door-step supply services from the HLS distributor. The addition of staples was necessary to establish minimum procurement volumes and ensure a sustainable business for the HLS distributor.

Nutritious Food Products	Other Food Products	Health and Hygiene Products
<ul style="list-style-type: none"> •Fortified Mustard Oil •Fortified Refined Oil •Pulses (Masur, Moong, Arhar) •Black gram •White Peas •Gram Flour •Milk •Eggs •Soy Protein Crumbs •Groundnut •Iodised Salt •Vegetables •Fruits 	<ul style="list-style-type: none"> •Rice •White Flour •Spices •Potato •Onion •Jaggery •Baby Food 	<ul style="list-style-type: none"> •Soaps •Sanitary Pads •Liquid Disinfectant •Floor Cleaner •Antiseptic cream

Figure 2. List of products available in HLS shops through the new supply chain model

The cost of delivery is a supply chain cost and should ideally be included in the business cost for the HLS distributor. However, in the early stages of implementation, the volume of business was low, and the distributor was unable to break even, much less generate a profit. Taking this into account, transport costs were supported by GAIN as start-up or catalytic funding, which would then be phased out once the costs could be absorbed by the HLS distributor. The project compensated the distributor for transport costs until November 2021 (for a total of 19 months) (Figure 3), after which the business between HLS distributors and HLS had generated enough surplus to meet the cost for doorstep delivery.

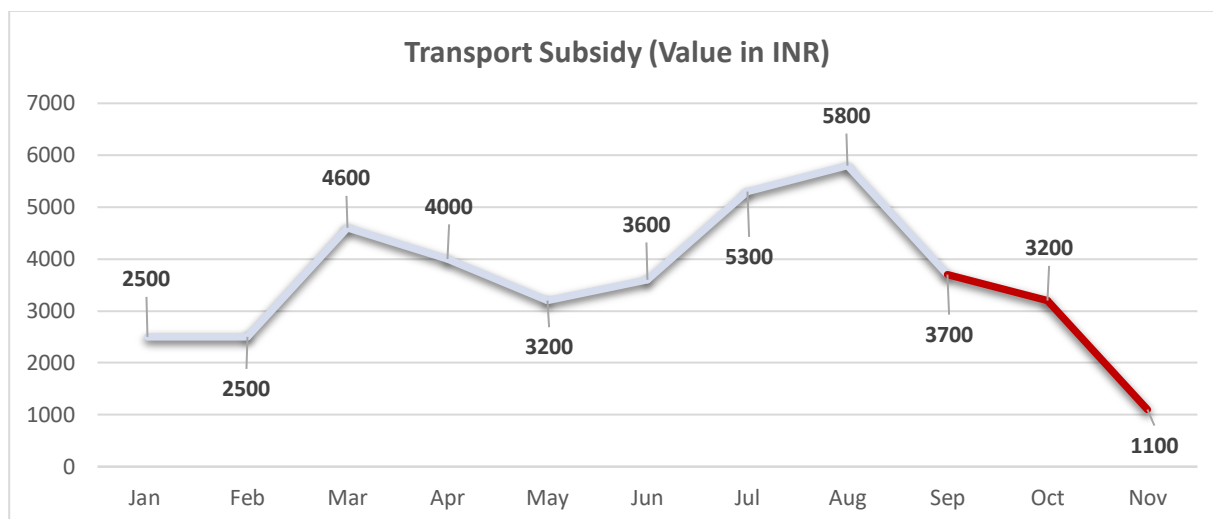


Figure 3. Total transport subsidy provided by the project in 2021 (1 USD = 80 INR)

In the post-COVID economy, there was an increase in the cost of products, which significantly reduced the investment capacity of HLSs, thus negatively impacting business volumes. To mitigate this challenge, a credit mechanism was introduced that provided HLS retailers with the option to stock more food products and ensure better sourcing. It also enabled the HLSs to expand their business, add new customers, and sell more products to their existing customers. The credit value provided was INR 143,000 (USD 1,906), with an average payback time of 15 days.

Simultaneously, and under a parallel element to the broader programme, a behaviour change campaign was conceptualised and delivered within the tea estates to generate demand for the nutritious food basket, including the new nutritious products being sold in the HLSs (focusing on the benefits of fortified foods, of fresh fruits and vegetables, and of protein-rich pulses).

Overall, a combined strategy of introducing new HLS, providing initial financial support, and generating demand through community awareness activities helped increasing the sustainability of the model. The strategy also supported the HLS owners to

to boost their average total monthly business volume from INR 11,200 (USD 149) in October 2019 to INR 670,540 (USD 8,940) in September 2021. The share of income from nutritious food products in this income was approximately 60% (Figure 4). The monthly combined business volume for nutritious food products for all the HLSs increased from INR 7,400 (USD 99) to INR 432,200 (USD 5,763) (Figure 5). Although the order value of all the food products increased substantially, most of the order value was generated from fortified mustard oil (a difference of over 120,000 INR (1500 USD) in sales per month) and pulses (an additional 103,000 INR (1287.5 USD) per month). By December 2022, the model was functioning without any external support.

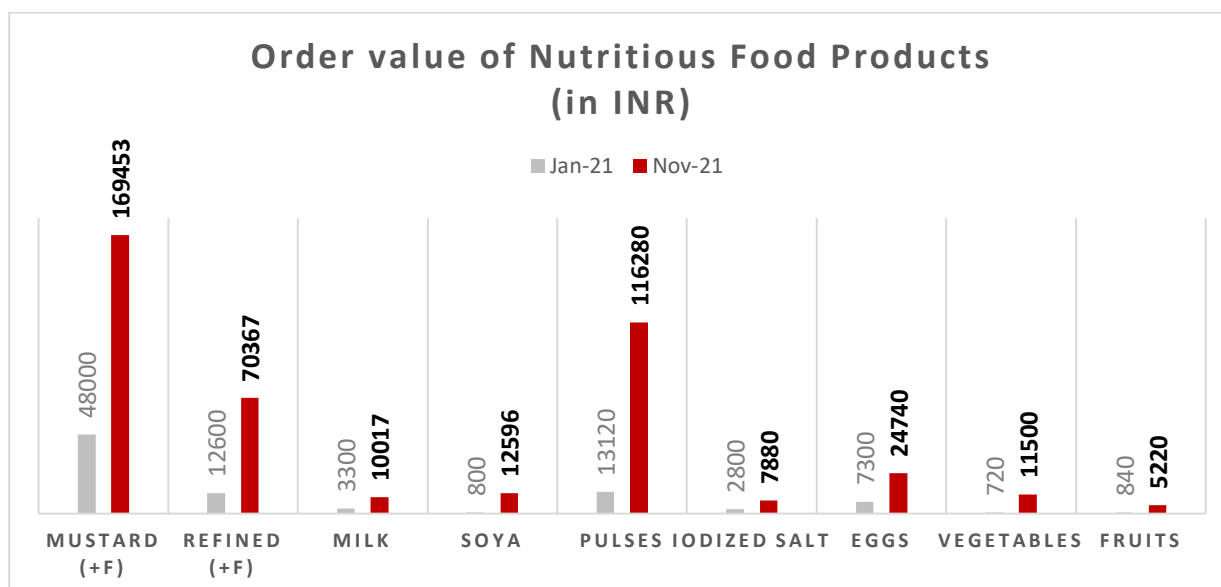


Figure 4. Growth in total order value of nutritious food products from January to November, 2021

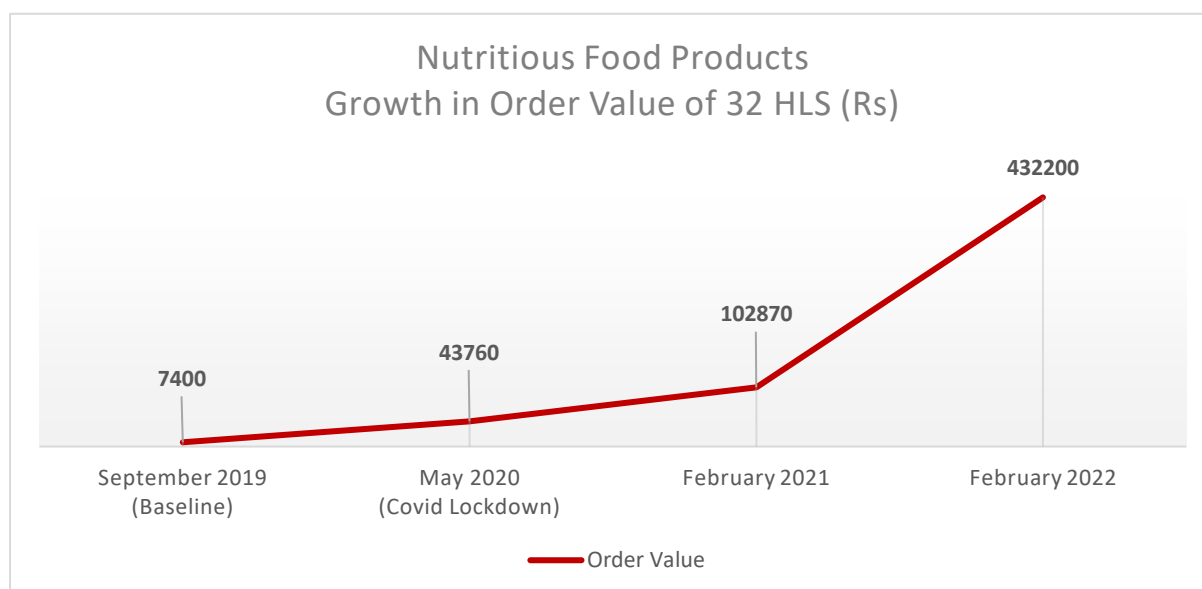


Figure 5. Increase in order value of nutritious food products in 32 HLS

DISCUSSION

The Healthy Line Shops model

By the end of two years of the pilot intervention, the project had stimulated trial stocking of nutritious food products, created a unique identity for the line shops, catalysed a viable door-to-door delivery system, introduced a credit system for HLS owners to support higher stocks of nutritious food products, and built the capacity of HLS owners to improve and adopt efficient retail practices (Figure 6).

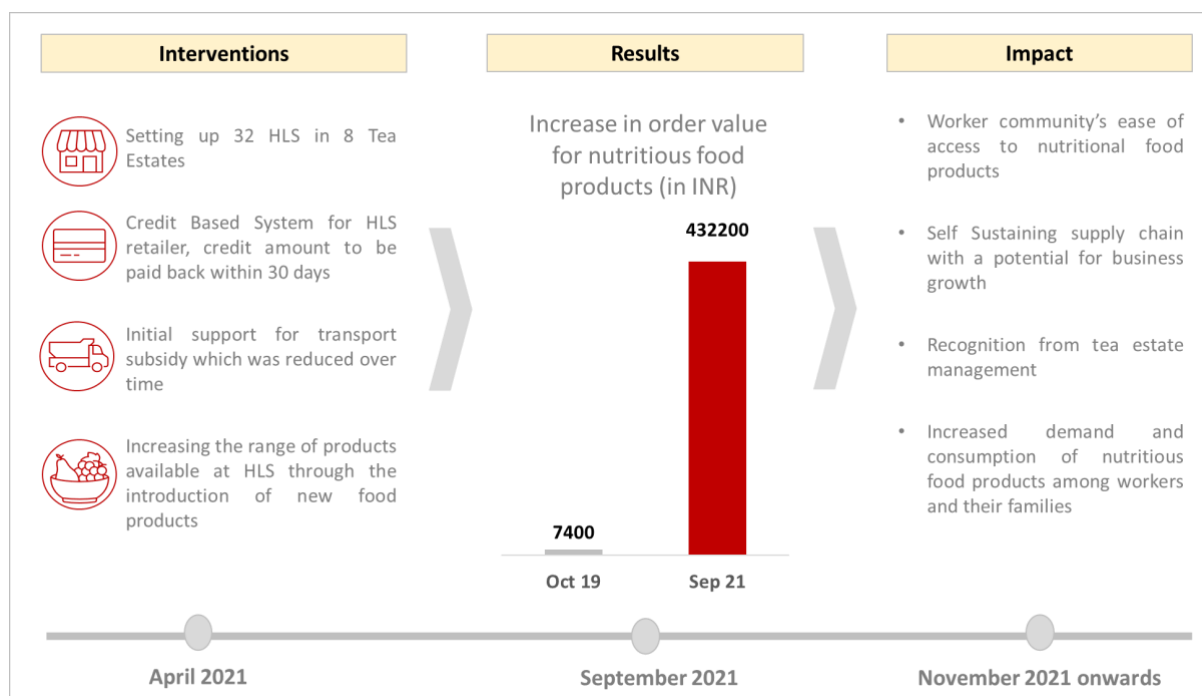


Figure 6. Snapshot of interventions, business growth and impact created by HLS model

The supply chain model described here has proven to be beneficial in four ways:

1. **Tea workers have improved access to nutritious food products:** Based on stock and sales data we can conclude that the project increased regular availability of specific nutritious food products (fortified cooking oil, milk, pulses, eggs, vegetables, and fruits) closer to worker households. Increased sales of these products from HLSs steadily over time is promising. We do not know if these foods were purchased elsewhere earlier, implying that the change may not have resulted in improved diets. However, we can conclude that the convenience of purchasing these foods has increased. An impact evaluation on this project early in 2023 will help determine if this intervention has improved diets, and for whom (within households). One limitation of this model, which has now transferred over to a sustained market model, is that without project support it will not be possible to control whether healthy foods remain a mainstay of this distribution system. The foods provided will instead be determined by consumer demand and shop owner preferences.
2. **Improved the capacity of HLS shop owners to manage stock:** Building capacity among the HLS owners to manage stocks, both in terms of the range and the volume of products, triggered business growth and business sustainability. The HLS owners also gained business capacity by improving their business processes. This included optimising order quantities, following structured order cycles, managing stocks and credits, and keeping track of products and other retailing practices. The project initiative of doorstep delivery of goods helped HLS owners to reduce their transportation costs and helped prevent stockouts. As a result, the overall average order value per HLS per month increased from INR 616 (USD 7.70) in October 2019 to INR 13,506 (USD 168) in September 2021, just for nutritious food products.
3. **Recognition from tea estate management:** The model has been highly appreciated by the tea estate management as a cost-effective strategy with minimal inputs, financial or otherwise. The managers highly valued the model, as it leveraged the existing structures of line shops to

improve access to nutritious foods for workers. The model is thus viewed as a win-win for both the management and its workers.

4. ***Business expansion and diversification for HLS distributors:*** Engaging with the project has provided a platform for the HLS distributor to expand its existing business of logistics with low investment and risk. With consistent demand for nutritious food products and a gradual reduction in operational costs, their profits have improved. As an outcome, the project-provided transportation subsidy for doorstep delivery to the HLS has now been withdrawn, as the supply chain has now become a viable, self-sustainable business model in the tea estate. The project has helped HLS shop owners and distributors gain social recognition, boosting their morale and motivation to not only grow their business but also fulfil a social responsibility.

CONCLUSION

This working paper has described an innovative market-based supply chain model that enables access to nutritious foods among communities of tea workers in Assam, India. It was found that the HLS has been effective in increasing sales and in the turnover of new or promoted healthy food items. Furthermore, the model has demonstrated viability and sustainability through the continuation and growth of business, even amidst the COVID-19 lockdown restrictions, and long after the gradual phase-out of support from the project. All stakeholders responded positively to the establishment of the HLS and their distribution systems on tea estates.

Given these outcomes, the market-based supply chain model is currently being expanded to an additional 30 tea estates spread across four other districts in Assam. Scaling involves the recruitment of four HLS distributors that collectively cover more than 120 HLSs, thus generating additional jobs in the local area. The project team will also explore other nutritious food products that can be introduced to expand the existing food basket.

By demonstrating a workable solution, the pilot intervention has helped add to knowledge on challenges and opportunities related to access to nutritious food products in hard-to-reach geographies where the market infrastructure has room for innovation. The model has potential for replication in other geographies and other value chains.

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