ONE40

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FORBES & WALKER TEA BROKERS PVT LTD

WEEKLY TEA MARKET REPORT

SALE NO

32

19TH/20TH AUGUST 2025

Overall Market

	QTY (M/KGS)	DEMAND
Ex Estate	0.73	Good
High & Medium	0.64	Good
Leafy	0.77	Less
Semi Leafy	0.67	Fair
Tippy/Small Leaf	0.90	Fair
Premium Flowery	0.05	Fair
Off Grade	1.27	Fair
Dust	0.46	Fair
Total	**5.50**	**Fair General**

ORDER OF SALE

SALE NO : 32
19TH/20TH AUGUST 2025

EX-ESTATE	LG LARGE LEAF LG SMALL LEAF/BOP1A/ PREMIUM	HIGH & MEDIUM/OFF GRADE /DUST
Eastern Brokers Ltd	Mercantile Produce Brokers (Pvt) Ltd	Mercantile Produce Brokers (Pvt) Ltd
Forbes & Walker Tea Brokers (Pvt) Ltd	Asia Siyaka Commodities PLC	**Forbes & Walker Tea Brokers (Pvt) Ltd**
John Keells PLC	Lanka Commodity Brokers Ltd	Bartleet Produce Marketing (Pvt) Ltd
Ceylon Tea Brokers PLC	Eastern Brokers Ltd	Lanka Commodity Brokers Ltd
Lanka Commodity Brokers Ltd	John Keells PLC	Ceylon Tea Brokers PLC
Asia Siyaka Commodities PLC	Bartleet Produce Marketing (Pvt) Ltd	Eastern Brokers Ltd
Bartleet Produce Marketing (Pvt) Ltd	Ceylon Tea Brokers PLC	John Keells PLC
Mercantile Produce Brokers (Pvt) Ltd	**Forbes & Walker Tea Brokers (Pvt) Ltd**	Asia Siyaka Commodities PLC

AUCTION DETAILS

AT THIS WEEK'S SALE 11,205 LOTS TOTALLING 5,502,017 KGS WERE ON OFFER. THE BREAKDOWN IS AS FOLLOWS:

	LOTS	QUANTITY
Ex Estate	770	732,392
Main Sale - High & Medium	1,507	642,921
Low Grown - Leafy	2,033	775,290
Low Grown - Semi Leafy	1,592	673,019
Low Grown - Tippy	1,922	898,050
Premium Flowery	399	53,112
Off Grades	2,458	1,268,903
Dust	524	458,330
Total	11,205	5,502,017
Re - Prints	833	438,081

SETTLEMENT DATES

22/08/2025	26/08/2025	27/08/2025
10% Payment	Buyers Prompt	Sellers Prompt

Quality

Overall, similar to last.

COMMENTS

Auction offerings totalled 5.5 M/Kgs, down from the previous week's 6.0 M/Kgs. There was fair general demand for the Low Growns, whilst there was improved activity for the High & Mid Growns (both Leafy and Small Leaf teas).

Ex-Estate offerings comprised of 0.73 M/Kgs, down from the 0.80 M/Kgs on offer the previous week. Overall quality of teas showed no significant change.

Better Western BOP/BOPF's were marginally easier. Improved BOP/BOPF's in the Below Best category gained by Rs. 20-40 per kg. Plainer BOP's were firm, whilst the corresponding BOPF's were firm and Rs. 20 per kg dearer. Nuwara Eliyas' continued to be a weak feature with most BOP/BOPF's invoices remaining unsold. Uda Pussellawas' mainly comprising of teas at the lower end of the market appreciated by Rs. 20-40 per kg. Uva seasonal teas continued to sell well with prices for BOP/BOPF's ranging between Rs. 2,500-3,400 per kg and Rs. 2,200-2,400 per kg respectively, whilst the other non-seasonal types sold around last.

CTC teas continued to sell around last week's levels, whilst there was more activity all round.

A selection of Leafy seasonal and non-seasonal teas sold well.

Fair activity from shippers to the continent, Japan and China. Less activity from shippers to South Africa, whilst shippers to the CIS and the Middle East continued to bid on a wide cross-section of the teas.

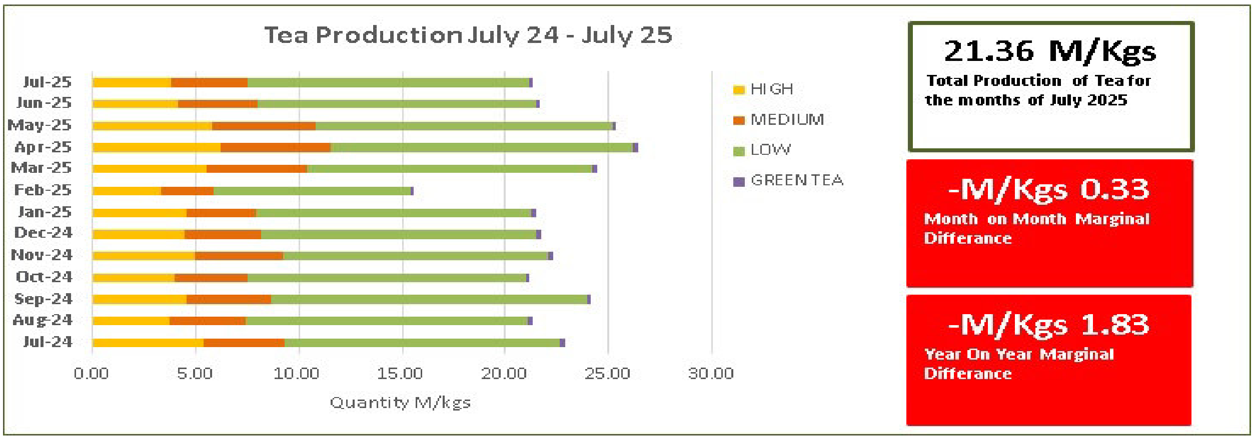
Low Growns comprised of approximately 2.3 M/Kgs. The Semi-Leafy, Tippy and Premium categories experienced fair demand, whilst the Leafy category met with less demand.

In the Leafy and Semi-Leafy catalogues, well-made BOP1's were firm, whilst the Below Best together with the bolder varieties were easier. Teas at the bottom maintained. Well-made OP1's maintained, whilst the balance declined. Select Best and Best OP's declined, whilst the cleaner Below Best and shorter varieties were irregular following quality. The balance sold around last levels. High-priced OPA's were easier, whilst the balance were firm. PEK/PEK1's, in general, appreciated. The smaller PEK1 varieties, in particular, gained substantially.

In the Tippy catalogue, a few select Best FBOP's sold around last levels, whilst the others together with the Best and Below Best varieties were firm to easier. Balance eased. However, a selection of bolder varieties appreciated, whilst the balance sold around last levels.

In the Premium catalogue, Very Tippy Teas were firm to dearer, whilst the Best and Below Best too followed a similar trend. Balance were irregular following quality.

NATIONAL TEA PRODUCTION



- **Production for the Month of July 2025 was recorded at 21.36 M/Kgs (↓ 1.83 M/Kgs)**
- **All Elevations except for the Low Grown elevation recorded negative variances against the corresponding month in 2024**
- **On a cumulative basis, all elevations recorded gains vis-à-vis January-July 2024**
- **Cumulative quantity produced stands at 157.12 M/Kgs (↑5.97 M/Kgs)**

JULY 2025/2024/2023

* Sri Lanka Tea Production for the month of July 2025 totalled 21.36 M/Kgs, witnessing a decline of 1.83 M/Kgs vis-à-vis 23.19 M/Kgs of July 2024. All elevations, except for the Low Grown Elevation, show a decline in comparison with the corresponding month of 2024.

* Compared to 21.57 M/Kgs of July 2023, the corresponding month in the year 2025 shows a decline of 0.21 M/Kgs (Refer table below).

ELEVATION	TOTAL	TOTAL	(2025-2024)		TOTAL	(2025-2023)	
	2025	2024	Variance (M/Kg)	%	2023	Variance (M/Kg)	%
HIGH	3,871,749	5,286,189	-1.41	-26.76%	4,426,982	-0.56	-12.54%
MEDIUM	3,654,570	4,173,865	-0.52	-12.44%	3,266,402	0.39	11.88%
LOW	13,644,032	13,494,811	0.15	1.11%	13,733,747	-0.09	-0.65%
GREEN TEA	188,885	236,930	-0.05	-20.28%	140,307	0.05	34.62%
TOTAL	21,359,236	23,191,795	-1.83	-7.90%	21,567,438	-0.21	-0.97%

JULY 2025/2024/2023

* January-July 2025 cumulative production totalled 157.12 M/Kgs, recording an increase of 5.97 M/Kgs vis-à-vis 151.15 M/Kgs of January-July 2024. All elevations recorded an increase in comparison with the corresponding period of 2024.

* Compared to 156.23 M/Kgs of January-July 2023, cumulative production of 2025 shows an increase of 0.89 M/Kgs. On a cumulative basis, Medium Grown elevation and Green Tea have recorded gains in variances, whilst the High Grown and Low Grown elevations have shown negative variances when compared with the same period in the year 2023 (Refer table below).

ELEVATION	TOTAL	TOTAL	(2025-2024)		TOTAL	(2025-2023)	
	2025	2024	Variance (M/Kg)	%	2023	Variance (M/Kg)	%
HIGH	33,675,308	32,498,696	1.18	3.62%	36,001,876	-2.33	-6.46%
MEDIUM	28,796,177	27,259,344	1.54	5.64%	25,306,357	3.49	13.79%
LOW	93,252,728	90,074,840	3.18	3.53%	93,590,022	-0.34	-0.36%
GREEN TEA	1,395,093	1,315,052	0.08	6.09%	1,334,926	0.06	4.51%
TOTAL	157,119,306	151,147,932	5.97	3.95%	156,233,181	0.89	0.57%

(Refer statistical details on Page No. 14)

World Tea News

Taiwan launched first AI tea production line

Taiwan's launched its first AI-integrated black tea production line. The initiative helps address labor shortages and the aging workforce. With the AI driven production line, manpower requirements can be reduced by two-thirds, or even to a fully unmanned
operation. The daily processing capacity for tea leaves has increased from four to eight tons.

The production line also features automated equipment for tea leaf storage and transport, rolling, loosening, fermentation, and drying. Heat is generated during the transportation of tea leaves from the plantation to the processing facility. If the process takes too long, the leaves can overheat and redden, leading to lower tea quality.

To address this, a transport and storage system with air-blowing channels to provide cool air during transit has been designed. A shade net is also installed above the system to help maintain tea leaf quality.

AI can intelligently manage the tea production process, including monitoring tea leaf color, equipment operation, and sensing humidity, temperature, and weight. The technology helps reduce errors caused by manual operation and enhances tea quality.

The AI system can also automatically archive production data and upload it to a cloud based management platform, enabling managers to monitor production progress in real-time.

Taiwan exported nearly 7,000 tons of tea to the US, valued at approximately NT $706 million (US $22 million), accounting for nearly 30% of total tea exports. Black tea and green tea made up the majority of these exports.

Source: Taiwan News (Extracts), Courtesy: Tea Exporters' Association Sri Lanka

CROP AND WEATHER

FOR THE PERIOD 13 - 18 August 2025

Western/Nuwara Eliya Regions

Rain was reported in the Western Region, whilst the Nuwara Eliya Region reported bright mornings and evening showers throughout the week. According to the Department of Meteorology, scattered showers are expected in the Western and Nuwara Eliya regions in the week ahead.

Uva/Udapussellawa Regions

The Uva and Uda Pussellawa regions reported bright weather and occasional showers throughout the week. The Department of Meteorology expects rain in both regions in the week ahead.

Low Growns

Intermittent showers were reported in the Low Grown Region throughout the week. According to the Department of Meteorology, rain is expected in the Low Grown Region in the week ahead.

Crop

The Nuwara Eliya, Uva, Uda Pussellawa and Western regions maintained the crop intake, whilst the Low Grown region reported an increase.

HIGH GROWN TEAS

Incline from last week
Decline from last week
Static Market

BOP

Best Western's were firm and marginally easier. In the Below Best category, a selection of brighter teas were firm and Rs. 20-40 per kg dearer, whilst the others were irregular. Teas at the lower end of the market were barely steady. Nuwara Eliya's were mostly unsold. Uda Pussellawa's were firm and Rs. 20-40 per kg dearer. Uva's - Seasonal teas continued to sell well with prices ranging between Rs. 2,500-3,400 per kg, whilst the other non-seasonal teas sold around last week's levels.

BOPF

Best Western's - Select high-priced teas of last week were marginally easier, whilst the others sold well though irregular following quality. In the Below Best category, select brighter invoices gained by up to Rs. 50 per kg, whilst the others were irregular following quality. Teas at the lower end of the market were firm and Rs. 20 per kg dearer, on average. Nuwara Eliya's were mostly unsold. Uda Pussellawa's were firm and Rs. 20-40 per kg dearer. Uva's - Seasonal teas continued to sell well with prices ranging between Rs. 2,200-2,400 per kg, whilst the other non-seasonal types continued to sell around last.

OP/OPA

Well-made varieties were firm to easier by Rs. 20 per kg, whilst the others and poorer sorts were firm to dearer by Rs. 20-30 per kg.

PEKOE/PEKOE1

Flavoury PEK's were firm to easier by Rs. 20-40 per kg, whilst the Orthodox Leafy PEK's were firm to dearer by Rs. 20-40 per kg and more at times. Best PEK1's were dearer by Rs. 30-50 per kg. Teas at the lower end were firm to dearer by Rs. 20-40 per kg. Best Rotovane PEK's gained by Rs. 50-100 per kg, whilst the Below Best and poorer sorts were irregularly dearer.

FBOP/FBOPF1

Flavoury FBOP/FBOPF1's were firm to selectively dearer, whilst the poorer sorts were easier by Rs. 20-40 per kg. Better Orthodox FBOP/FBOPF1's appreciated by Rs. 40-60 per kg, whilst the others and teas at the lower end were firm to dearer by Rs. 20-40 per kg.

QUOTATIONS LKR	BOP		BOPF		PEKOE/FBOP		OP	
SALE DTE	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug
Best Westerns	1240-1400	1200 - 1320	1280-1550	1300 - 1480	1260-1600	1280 - 1850	N/A	1060 - 1260
Below Best Westerns	1100-1220	1120 - 1180	1180-1260	1200 - 1260	1060-1200	1100 - 1260	1000-1040	960 - 1040
Plainer Westerns	980-1080	1000 - 1100	1040-1160	1020 - 1180	850-1000	820 - 900	920-980	890 - 940
Nuwara Eliyas	1220	N/A	1200-1220	N/A	810-980	750 - 1140	960	920 - 960
Brighter Udapussellawas	1000	1000 - 1080	1080-1140	1140 - 1220	1300-1440	1380 - 1550	960-1160	980 - 1060
Other Udapussellawas	880-920	860 - 960	860-900	880 - 960	870-1180	860 - 1280	940	870 - 940
Best Uvas	2500-3600	2200 - 3400	2250-2550	2250 - 2700	1320-1700	1360 - 1700	1020-1180	1060 - 1240
Other Uvas	1100-1300	1180 - 1220	1200-1300	1200 - 1340	790-1300	820 - 1340	840-1000	750 - 1040

MEDIUM GROWN TEAS

Incline from last week
Decline from last week
Static Market

BOP	Large Leaf teas gained by up to Rs. 50 per kg and more, whilst the others were firm and Rs. 20 per kg dearer.
BOPF	Better sorts were Rs. 20-40 per kg dearer, whilst the others were generally firm.
OP/OPA	Well-made teas were firm to dearer by Rs. 20-40 per kg, whilst the others and poorer sorts appreciated by Rs. 20 per kg.
PEKOE/PEKOE1	Best PEK's were firm to dearer by Rs. 20-40 per kg. PEK1's gained by Rs. 30-50 per kg, whilst the Below Best and others were irregularly dearer.
FBOP/FBOPF1	A few Select Best FBOP/FBOPF1's were dearer by Rs. 50-80 per kg, whilst the others were firm to dearer by Rs. 30-50 per kg. Teas at the lower end were firm to dearer by Rs. 20-30 per kg.

QUOTATIONS LKR	BOP		BOPF		PEKOE/FBOP		OP	
SALE DTE	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug
Good Mediums	1320-1750	1420 - 1850	1040-1160	1180 - 1200	1440-2400	1420 - 2350	1120-1380	1140 - 1300
Other Mediums	820-1180	840 - 1020	850-960	840 - 1000	870-1420	840 - 1400	760-1100	700 - 1120

UNORTHODOX / CTC TEAS

HIGH GROWN	BP1s - Hardly any offerings. PF1s - Better types sold around last, whilst the others were irregular following quality.
MEDIUM GROWN	BP1s - Irregular. PF1s - Better sorts sold around last, whilst the others were irregular following quality.
LOW GROWN	BP1s - Select Best were substantially dearer, whilst the others were irregular. PF1s - Generally firm.

QUOTATIONS LKR	BP1		PF1	
SALE DTE	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug
High Grown	N/A	N/A	920-1160	920 - 1180
Medium Grown	N/A	N/A	940-1180	940 - 1220
Low Grown	1300-1360	1400 - 1440	1200-1460	1240 - 1460

Incline from last week
Decline from last week
Static Market

OFF GRADES

FGS1/FGS

Teas in the Best category which commenced firm, gained by Rs. 20-40 per kg as the sale progressed. Improved Below Best varieties were firm to dearer, whilst the others maintained. Teas at the lower end of the market were irregular. Low Growns- In general, were firm on last. CTC- Declined sharply.

BROKENS

Reducer varieties together with the clean leaf sorts in the Best category were firm to selectively dearer, whilst the others maintained. Teas at the bottom end of the market were lower.

BOP1A

Main Grade reducer varieties in the Best category were firm to selectively dearer, whilst the balance maintained. Below Best varieties were firm to easier by Rs. 10-20 per kg, whilst select invoices remained unsold. Poorer sorts maintained, whilst select invoices declined by Rs. 20-30 per kg.

QUOTATIONS LKR	HIGH		MEDIUM		LOW	
SALE DTE	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug
Better Fannings (Orthodox)	750-1260	760 - 1220	760-900	770 - 1000	750-870	760 - 940
Better Fannings (CTC)	N/A	N/A	N/A	760 -	770-1300	750 - 1240
Other Fannings (Orthodox)	600-740	590 - 750	540-750	530 - 760	520-740	560 - 750
Other Fannings (CTC)	N/A	N/A	680-700	600 - 730	570-710	570 - - 740
Good Brokens	760-980	770 - 1300	760-1320	770 - 1340	770-1280	770 - - 1260
Other Brokens	600-750	610 - 760	560-750	570 - 760	560-760	570 - 760
Better BOP1As	790-890	790 - 920	800-1180	790 - 1440	800-1480	800 - - 1500
Other BOP1As	710-770	700 - 770	700-780	700 - 770	650-780	610 - 780

DUSTS

DUST1

Select Best Dust1's were firm on last week's price levels, whilst the Best varieties appreciated by Rs. 40 per kg. The Below Best varieties appreciated by Rs. 40-60 per kg, whilst the poorer sorts were dearer by Rs. 20-40 per kg. Low Grown Best varieties were firm, whilst the Below Best varieties and poorer sorts were firm to dearer by Rs. 20-30 per kg. High and Medium Grown CTC's were firm to dearer by Rs. 20-40 per kg. Low Grown CTC's remained firm.

DUST

Clean leaf secondaries were dearer by Rs. 20-40 per kg, whilst the poorer sorts were firm to dearer by Rs. 20 per kg. The Low Grown Best varieties together with the poorer sorts remained firm.

QUOTATIONS LKR	HIGH		MEDIUM		LOW	
SALE DTE	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug
Better Primary Dust (Orthodox)	1220-1650	1220 - 1650	1060-1260	1080 - 1320	1000-1500	1000 - 1240
Better Primary Dust (CTC) P. Dust	1060-1160	1080 - 1280	1080-1180	1100 - 1220	1100-1400	1120 - 1440
Below Best Primary Dust (Orthodox)	950-1200	980 - 1200	850-1040	860 - 1060	810-980	810 - 980
Other Primary Dust (CTC) P. Dust	880-1040	800 - 1060	1000-1060	940 - 1080	740-1080	720 - 1100
Other Primary Dust (Orthodox)	650-940	700 - 960	570-840	590 - 850	550-800	560 - 800
Better Secondary Dust	940-1060	960 - 1140	800-850	810 - 870	960-1300	920 - 1020
Other Secondary Dust	590-920	600 - 950	580-780	590 - 800	500-940	590 - 900

LOW GROWN TEAS

Incline from last week
Decline from last week
Static Market

FBOP/FBOP1 A few select Best FBOP's sold around last levels, whilst the others together with the Best and Below Best varieties were firm to easier. Balance eased. However, a selection of bolder varieties appreciated, whilst the balance sold at last levels. FBOP1's were fully firm.

BOP In general, were firm to dearer.

BOP1 Well-made BOP1's were firm, whilst the Below Best together with the bolder varieties were easier. Teas at the bottom maintained.

OP1 Well-made OP1's were firm, whilst the balance declined.

OP Well-made OP's declined, whilst the cleaner Below Best and shorter varieties were irregular following quality. The balance sold around last level.

OPA High-priced OPA's were easier, whilst the balance were firm.

PEKOE PEK/PEK1's, in general, appreciated. The smaller PEK1 varieties, in particular, gained substantially.

BOPF BOPF's were firm on last.

FBOPF/FBOPF1 Very Tippy Teas were firm to dearer, whilst the Best and Below Best too followed a similar trend. Balance were irregular following quality. FF1's, in general, were firm.

QUOTATIONS LKR	SELECT BEST		BEST		BELOW BEST		OTHERS	
SALE DTE	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug	12/13 Aug	19/20 Aug
FBOP 1	1800-1900	1800 - 1900	1400-1500	1400 - 1450	1250-1300	1250 - 1300	1000-1100	1000 - 1100
FBOP	1900-2300	1900 - 2400	1500-1600	1500 - 1600	1250-1300	1250 - 1300	1000-1100	950 - 1000
BOP 1	2400-2900	2400 - 3000	1850-2350	1850 - 2350	1100-1400	1100 - 1400	850-1080	850 - 1080
BOP	1900-2200	1900 - 2200	1400-1450	1450 - 1500	1200-1300	1200 - 1300	950-1000	950 - 1000
BOPF	1400-1500	1400 - 1600	950-1050	950 - 1050	850-900	850 - 900	800-850	800 - 850
FBOPF (TIPPY)/FBOPF SP	4200-5200	4300 - 5400	3400-3900	3500 - 4000	2450-3000	2500 - 3000	1000	1000 -
FBOPF 1	1600-1700	1600 - 1700	1450-1500	1450 - 1500	1280-1380	1280 - 1300	950-1050	950 - 1050
FBOPF	1750-1800	1800 - 1900	1400-1500	1450 - 1550	1100-1200	1150 - 1250	900-950	900 - 950
OP 1	2550-3200	2500 - 3200	2250-2500	2200 - 2450	1300-2150	1260 - 2100	900-1280	850 - 1200
OP	1480-1800	1460 - 1550	1340-1460	1360 - 1440	1180-1320	1180 - 1340	860-1160	860 - 1160
OPA	1440-1950	1420 - 1750	1240-1420	1220 - 1400	1140-1200	1140 - 1200	850-1120	850 - 1120
PEKOE	1550-2600	1600 - 2700	1440-1500	1460 - 1550	1200-1420	1240 - 1440	850-1180	850 - 1220
PEK 1	1750-2850	1800 - 3100	1600-1700	1600 - 1750	1300-1550	1360 - 1550	900-1280	940 - 1340

TOP PRICE

WESTERN MEDIUM				
Ancoombra	BOP			1850
Ancoombra	BOPSp			1550
Craighead	**BOPSp**	**@**		**1460**
Dartry Valley	**BOPF/BOPFSp**	**@**		**1440**
Galgewatta	BOP1			1700
Craighead	**FBOP/FBOP1**	**@**		**2350**
Harangalla	**FBOP/FBOP1**	**@**		**1900**
Dartry Valley	**FBOP/FBOP1**	**@**		**1900**
Harangalla	**FBOPF/FBOPF1**	**@**		**1650**
Ancoombra	FBOPF/FBOPF1			1650
Dartry Valley	**FBOPF/FBOPF1**	**@**		**1600**
Imboolpittia	**FBOPF/FBOPF1**	**@**		**1460**
Hatale	OP/OPA			1420
New Rothschild	OP1			1380
Gatagahawela	PEK/PEK1			1950
Harangalla	**PEK/PEK1**	**@**		**1900**
Greenwood	PEK/PEK1			1900
Meezan	PEK/PEK1			1900
Uplands	PEK/PEK1			1900
WESTERN HIGH				
Wattegodde	**BOP**	**@**		**1320**
Kotiyagalla	**BOPSp**	**@**		**1360**
Alton	**BOPF/BOPFSp**	**@**		**1480**
Great Western	BOPF/BOPFSp			1480
Somerset	**BOPF/BOPFSp**	**@**		**1460**
Gouravilla	BOPF/BOPFSp			1460
Wattegodde	BOPF/BOPFSp			1460
Bambrakelly	BOP1			1600
Glenloch	**BOP1**	**@**		**1550**
Bambrakelly	FBOP/FBOP1			1850
Glenloch	**FBOPF/FBOPF1**	**@**		**1480**
Bambrakelly	OP/OPA			1260
Glenloch	**OP/OPA**	**@**		**1140**
Torrington	**OP/OPA**	**@**		**1120**
Venture	OP/OPA			1120
Frotoft Super	OP1			1120
Frotoft Super	PEK/PEK1			1850
Torrington	**PEK/PEK1**	**@**		**1750**
Cymru	PEK/PEK1			1750
Bambrakelly	PEK/PEK1			1750
NUWARA ELIYAS				
Kenmare	BOPF/BOPFSp			800
Kenmare	OP/OPA			960
Court Lodge	**OP/OPA**	**@**		**940**
Kenmare	PEK/PEK1			1140
Court Lodge	**PEK/PEK1**	**@**		**1120**
UDAPUSSELLAWAS				
Luckyland	BOP			1080
Mooloya	BOP			1080
High Forest	**BOP**	**@**		**960**
Kirklees	BOP			960

UDAPUSSELLAWAS				
Luckyland	BOPSp			960
Blairlomond	**BOPSp**	**@**		**840**
Mooloya	BOPF/BOPFSp			1220
Delmar	**FBOP/FBOP1**	**@**		**1440**
Maha Uva	**FBOP/FBOP1**	**@**		**1400**
Maha Uva	**FBOPF/FBOPF1**	**@**		**1750**
Delmar	**FBOPF/FBOPF1**	**@**		**1400**
Gonapitiya	FBOPF/FBOPF1			1400
Blairlomond	**FBOPF/FBOPF1**	**@**		**1360**
Maha Uva	**OP/OPA**	**@**		**1080**
Gonapitiya	OP1			1200
Blairlomond	**PEK/PEK1**	**@**		**1850**
LOW GROWNS				
Nawagamuwehena	BOP			2700
Elaine Super	BOP			2700
Andaradeniya Super	BOP			2650
Hidellana	**BOP**	**@**		**2350**
Stream Line	BOPSp			2600
Uruwala	**BOPSp**	**@**		**2050**
Greenwin Super	BOPSp			2050
Rain Forest	BOPSp			2050
Kings Bru	BOPF			1850
Greenwin Super	BOPFSp			2200
Sithaka	FBOP			2550
Sithaka	FBOP1			2000
Ganganee	FBOPF			2100
Woodland Grand	FBOPF1			1850
Pothotuwa	**FBOPF1**	**@**		**1750**
Gunawardana	**FBOPF1**	**@**		**1750**
Adams View	**FBOPF1**	**@**		**1750**
Lumbini	FBOPF1			1750
Makandura	BOP1			3000
Pothotuwa	**BOP1**	**@**		**2900**
Dampahala	OP1			3200
Berubeula	OP			1550
Nilrich	OP			1550
Mulatiyana Hills	OP			1550
Rotumba	OP			1550
Green Lanka	OP			1550
Fortune	**OP**	**@**		**1500**
Ceyenta	OP			1500
Sihara	OP			1500
Magedara	OP			1500
Miriswatta	OP			1500
Liyonta	OPA			1750
Lumbini	PEK			2700
Liyonta	**PEK1**	**@**	******	**3100**

@ - SOLD BY FORBES & WALKER TEA BROKERS (PVT) LTD. ** - ALL TIME RECORD PRICE. * - EQUAL ALL TIME RECORD PRICE

UVA MEDIUM			
St.James	**BOP**	**@**	**2800**
Dickwella	**BOP**	**@**	**1500**
Demodera 'S'	BOPSp		1420
St.James	BOPF/BOPFSp		2300
El Teb	**BOPF/BOPFSp**	**@**	**1340**
Demodera 'S'	**BOP1**	**@**	**1950**
Demodera 'S'	FBOP/FBOP1		2100
Aruna Passara	FBOPF/FBOPF1		1550
Demodera 'S'	**FBOPF/FBOPF1**	**@**	**1500**
Aruna Passara	OP/OPA		1300
Gonakelle	OP1		1260
St.James	PEK/PEK1		3000
Haputale Super	**PEK/PEK1**	**@**	**1850**
Aruna Passara	PEK/PEK1		1850
Ury	PEK/PEK1		1850
Demodera 'S'	PEK/PEK1		1850
Aruna Keppetipola	PEK/PEK1		1850
Halpewatta Uva	**PEK/PEK1**	**@**	**1800**
Misty Uva	**PEK/PEK1**	**@**	**1800**
Meddakanda	PEK/PEK1		1800
Glen Alpin	PEK/PEK1		1800
Telbedde	PEK/PEK1		1800
UVA HIGH			
Uva Highlands	BOP		3400
Ranaya	BOPSp		1240
Aislaby	**BOPF/BOPFSp**	**@**	**2700**
Uva Highlands	**BOPF/BOPFSp**	**@**	**2300**
Ranaya	BOP1		1480
Gonamotawa	**FBOP/FBOP1**	**@**	**1700**
Gonamotawa	**FBOPF/FBOPF1**	**@**	**1460**
Ranaya	OP/OPA		1240
Mount Uva	OP1		1300
Uva Highlands	PEK/PEK1		3600

UNORTHODOX HIGH			
Ulugedara CTC	PF1		1180
UNORTHODOX MEDIUM			
Strathdon CTC	**PF1**	**@**	**1220**
New Rothschild CTC	BP1		900
Delta CTC	BP1		900
UNORTHODOX LOW			
Hingalgoda CTC	PF1		1460
Ceciliyan CTC	BP1		1440
PREMIUM FLOWERY			
Andaradeniya Super	FBOPFSp		6000
New Falcon Lanka	FBOPFExSp		5400
Garden Leaf Super	**FBOPFExSp1**	**@**	**5550**
DUSTS			
Mattakelle	DUST1		1650
Ceciliyan CTC	PD		1440
OFF GRADES			
Eildon Hall	**FGS/FGS1**	**@**	**1220**
Wanarajah	**FGS/FGS1**	**@**	**1200**
Kotiyagalla	FGS/FGS1		1200
Mattakelle	FGS/FGS1		1200
Glentilt	FGS/FGS1		1200
Gouravilla	**FGS/FGS1**	**@**	**1180**
Wattegodde	**FGS/FGS1**	**@**	**1180**
Nayabedde	FGS/FGS1		1180
Hingalgoda CTC	PF		1240
Uplands	BM		1240
Gunawardana	**BM**	**@**	**1200**
Kothmale Hills	BP		1340
Mahagastotte	**BP**	**@**	**1300**
Aldora	**BOP1A**	**@**	**1500**
Chandrika Estate	BOP1A		1500

QUANTITY SOLD

DURING THE PERIOD 11TH-16TH AUGUST 2025	WEEKLY (KGS) 2025	WEEKLY (KGS) 2024	TODATE (KGS) 2025	TODATE (KGS) 2024
PRIVATE SALES	208,939	118,848	6,745,148	3,979,051
PUBLIC AUCTION	4,962,379	5,151,886	156,950,187	148,304,008
FORWARD CONTRACTS	20,000	70,480	1,571,231	1,252,810
DIRECT SALES	NIL	NIL	NIL	NIL
TOTAL	**5,191,318**	**5,341,214**	**165,266,566**	**153,535,869**
BMF EXCLUDED FROM PRIVATE SALE	47,080	NIL	1,185,538	1,370,894

(QUANTITY SOLD AND THE AVERAGE PRICE PER AUCTION)

	Quantity (M/kgs)			AVG Price (LKR)			Avg Price (USD)		
	2025	2024	2023	2025	2024	2023	2025	2024	2023
05TH AUGUST 2025	4.60	4.98	5.26	1176.63	1214.10	1021.92	3.96	4.07	3.15
13TH AUGUST 2025	4.96	5.15	5.25	1194.44	1198.72	1072.60	4.02	4.03	3.40

Source: Central Bank of Sri Lanka / Buying Rates

RATES OF EXCHANGE

SRI LANKA RUPEE APPROX PER UNIT OF CURRENCY

YEAR	2025	2024	2023
USD	297.50	295.08	313.99
STG.PD	400.46	375.51	396.43
EURO	345.42	321.01	341.81
YEN	2	1.99	2.15

Source: Central Bank of Sri Lanka / Buying Rates

PUBLIC AUCTION/GROSS SALES AVERAGE

SALE NO 31	WEEKLY(LKR)			TODATE (LKR)			WEEKLY(USD)			TODATE(USD)		
12TH/ 13TH AUGUST 2025	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
Uva High Grown	1135.16	1100.05	907.07	1034.99	1111.06	994.95	3.82	3.70	2.88	3.49	3.65	3.03
Western High Grown	1138.22	1177.92	925.52	1091.02	1194.57	1145.90	3.83	3.96	2.94	3.68	3.92	3.49
CTC High Grown	1065.75	1009.56	812.57	1069.08	1112.51	1034.21	3.59	3.39	2.58	3.60	3.66	3.15
High Grown (Summary)	1137.12	1152.54	918.15	1072.79	1167.82	1098.38	3.83	3.87	2.91	3.62	3.84	3.34
Uva Medium Grown	1076.28	1095.83	968.94	1067.51	1148.74	1030.01	3.62	3.68	3.07	3.60	3.77	3.14
Western Medium Grown	990.48	1023.10	872.88	1004.15	1074.90	1000.75	3.33	3.44	2.77	3.38	3.53	3.05
CTC Medium Grown	956.50	973.03	756.90	940.55	980.42	934.87	3.22	3.27	2.40	3.17	3.22	2.85
Medium Grown (Summary)	1015.86	1047.22	905.37	1025.19	1100.12	1010.16	3.42	3.52	2.87	3.46	3.61	3.08
Orthodox Low Grown	1285.66	1278.43	1180.81	1258.10	1386.32	1289.48	4.33	4.29	3.75	4.24	4.55	3.93
CTC Low Grown	971.84	941.84	948.41	979.60	1007.20	958.92	3.27	3.16	3.01	3.30	3.31	2.92
Low Grown(Summary)	1261.67	1262.07	1167.68	1243.11	1361.82	1271.30	4.25	4.24	3.71	4.19	4.47	3.87
Total	1194.44	1198.72	1072.60	1170.30	1275.82	1190.14	4.02	4.03	3.40	3.94	4.19	3.62

Source: Oanda Exchange Rates
Source: MSL - Averages

SRI LANKA TEA PRODUCTION (M/KGS)

JULY 2024-2025

Elevation	CTC		CHANGE 24/25		ORTHODOX		CHANGE 24/25		TOTAL		CHANGE 24/25	
	2025	2024	Actual	%	2025	2024	Actual	%	2025	2024	Actual	%
HIGH	444,673	393,926	0.05	12.88	3,427,076	4,892,263	-1.47	-29.95	3,871,749	5,286,189	-1.41	-26.76
MEDIUM	710,021	749,960	-0.04	-5.33	2,944,549	3,423,905	-0.48	-14.00	3,654,570	4,173,865	-0.52	-12.44
LOW	913,361	918,935	-0.01	-0.61	12,730,671	12,575,876	0.15	1.23	13,644,032	13,494,811	0.15	1.11
GREEN TEA	000	000	0.00	N/A	000	000	0.00	N/A	188,885	236,930	-0.05	-20.28
T/B Adjustment	000	000	0.00	N/A	000	000	0.00	N/A	00	00	00	00
TOTAL	2,068,055	2,062,821	0.01	0.25	19,102,296	20,892,044	-1.79	-8.57	21,359,236	23,191,795	-1.83	-7.90

JANUARY - JULY 2024-2025

Elevation	CTC		CHANGE 24/25		ORTHODOX		CHANGE 24/25		TOTAL		CHANGE 24/25	
	2025	2024	Actual	%	2025	2024	Actual	%	2025	2024	Actual	%
HIGH	3,065,557	3,068,146	0.00	-0.08	30,609,751	29,430,550	1.18	4.01	33,675,308	32,498,696	1.18	3.62
MEDIUM	5,095,026	4,404,116	0.69	15.69	23,701,151	22,855,228	0.85	3.70	28,796,177	27,259,344	1.54	5.64
LOW	5,862,008	6,061,013	-0.20	-3.28	87,390,720	84,013,827	3.38	4.02	93,252,728	90,074,840	3.18	3.53
GREEN TEA	000	000	0.00	N/A	000	000	0.00	N/A	1,395,093	1,315,052	0.08	6.09
T/B Adjustment	000	000	0.00	N/A	000	000	0.00	N/A	00	00	00	00
TOTAL	14,022,591	13,533,275	0.49	3.62	141,701,622	136,299,605	5.40	3.96	157,119,306	151,147,932	5.97	3.95

WORLD TEA PRODUCTION (M/KGS)

				TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
Jul								
Sri Lanka	21.6	23.2	21.3	156.2	151.1	157.1	-5.1	6

				TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
Jun								
Kenya	48.1	46.2	42.4	273.6	323.3	283.2	49.7	-40.1
North India	116.8	121.5	112.5	353.8	313.7	352.8	-40.1	39.1
South India	28.4	25.2	20.9	113.4	100.4	116.9	-13	16.5

				TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
May								
Bangladesh	8.2	4.8	8.6	13.7	11.5	12.6	-2.2	1.1
Malawi	3.9	4.4	4.4	28.9	31.3	29.4	2.4	-1.9

DETAILS OF AWAITING SALE

SALE NO : 33

Scheduled for 26TH/27TH AUGUST 2025

	LOTS	QUANTITY
ExEstate	749	706,423
High & Medium	1,414	584,890
Leafy	2,104	796,831
Semi Leafy	1,587	647,166
Tippy	1,937	882,373
Premium Flowery	442	57,284
OffGrades	2,210	1,132,197
Dust	469	388,137
Total	**10,912**	**5,195,301**
RePrint	1,152	586,077

02/09/2025
Buyers Prompt

03/09/2025
Sellers Prompt

This sale last year
Sale No. 33 | 20TH/21ST AUGUST 2024

Lots	**:11,547**
Re-print Lots	**:1,042**
Quantity	**:5,796,457 kgs**
Re-print Quantity	**:473,218 kgs**

LOW GROWN CATALOGUES

Violations Excluded

07/08/2025

LEAFY	SEMI-LEAFY	TIPPY
Closed	Closed	Closed

OTHER MAIN SALE CATALOGUES

07/08/2025

HIGH & MEDIUM	PREMIUM FLOWERY	OFF GRADES
Closed	Closed	Closed

NO .OF PKGS

141,009

CTC

10,400 Pkgs - 547,168 kgs

ORDER OF SALE

Ex-Estate	LG Large Leaf//Semi Leafy/LG Small Leaf/BOP1A/ Premium	High & Medium/Off Grade /Dust
JK	AS	CTB
LC	LC	LC
MB	JK	BC
EB	BC	**FW**
CTB	EB	MB
FW	CTB	AS
BC	**FW**	JK
AS	MB	EB

BC - Bartleet Produce Marketing (Pvt) Ltd
FW - Forbes & Walker Tea Brokers (Pvt) Ltd
LC - Lanka Commodity Brokers Ltd
AS - Asia Siyaka Commodities PLC
EB - Eastern Brokers Ltd
JK - John Keells PLC
CTB - Ceylon Tea Brokers PLC
MB - Mercantile Produce Brokers (Pvt)Ltd

Approx Selling time of F&W Catalogues

26TH
AUGUST 2025

11.00am	Main Sale - High & Medium
2.30pm	Semi - Leafy Teas
3.30pm	Low Grown - Leafy Teas
4.00pm	Low Grown - Tippy Teas
5.00pm	BOP1A

27TH
AUGUST 2025

9.30am	Premium Flowery
9.30am	Off Grade
10.30am	Ex-Estate
1.30pm	Dust

DETAILS OF AWAITING SALE

SALE NO : 34

Scheduled for 01ST/02ND SEPTEMBER 2025

	LOTS	QUANTITY
ExEstate	672	644,791
High & Medium	1,381	575,134
Leafy	1,947	744,017
Semi Leafy	1,410	585,645
Tippy	1,791	818,511
Premium Flowery	352	44,608
OffGrades	2,556	1,280,176
Dust	510	412,306
Total	**10,619**	**5,105,188**
RePrint	1,039	503,557

08/09/2025
Buyers Prompt

09/09/2025
Sellers Prompt

This sale last year
Sale No. 34 | 27TH/28TH AUGUST 2024

Lots	**:11,130**
Re-print Lots	**:744**
Quantity	**:5,543,854 kgs**
Re-print Quantity	**:361,539 kgs**

LOW GROWN CATALOGUES

Violations Excluded

14/08/2025

LEAFY	SEMI-LEAFY	TIPPY
Closed	Closed	Closed

OTHER MAIN SALE CATALOGUES

14/08/2025

HIGH & MEDIUM	PREMIUM FLOWERY	OFF GRADES
Closed	Closed	Closed

NO .OF PKGS

139,431

CTC

10,030 Pkgs - 531,237 kgs

CATALOGUE CLOSURE DETAILS

01/02
SEPTEMBER 2025

Sale No. 34

The Ex-Estate catalogue closed on 14th August 2025, excluding violations. The Main Sale catalogues too closed on 14th August 2025, excluding violations.

09/10
SEPTEMBER 2025

Sale No. 35

The Ex-Estate and Main Sale catalogues are scheduled to close on 21st August 2025.

16/17
SEPTEMBER 2025

Sale No. 36

The Ex-Estate and Main Sale catalogues are scheduled to close on 28th August 2025.

TEA MARKETS AROUND THE WORLD

MOMBASA AUCTION

18TH and 19th AUGUST 2025 (SALE NO. 33)

Good general demand prevailed for the 151,641 packages (10,271,565.00 kilos) available in the market; 32.13% remained unsold.

MARKETS

Pakistan Packers lent strong support with more enquiry from Yemen and other Middle Eastern countries. Kazakhstan and other CIS states were active but with selective interest on quality. Bazaar maintained participation with increased and strong support from Afghanistan and Egyptian Packers. UK were active with Russia more selective. Sudan and South Sudan were absent with Local Packers barely operating. Somalia were active at the lower end of the market.

OFFERINGS

Leaf Grades - 81,080 packages (5,339,234.00 kilos) - 32.07% unsold.
Dust Grades - 56,201 packages (4,188,429.00 kilos) - 37.87% unsold.
Secondary Grades - 14,360 packages (743,902.00 kilos) - 10.03% unsold.

LEAF GRADES (M2 & M3)

BP1:

Best - Were mostly dearer by up to USC26 with select lines USC50 above previous rates, however a few invoices lost up to USC26.
Brighter - Irregular ranging between firm to USC34 above last levels to easier by up to USC12.
Mediums - KTDA mediums were steady to USC7 dearer to easier by up to USC10 with plantation mediums well sought after advancing by up to USC15.
Lower Medium - Maintained enquiry at irregular levels varying between USC7 dearer for a few lines but were mostly discounted by up to USC14.
Plainer - Met strong support and varied between firm to USC3 dearer to easier by up to USC11.

PF1:

Best - Irregular and ranged between mostly firm to dearer by up to USC30 while some lines were discounted by up to USC44.
Brighter - Dearer by up to USC22.
Mediums - KTDA mediums gained up to USC16 to easier by up to USC3 with plantation mediums well sought after gaining by up to USC16 to easier by USC1.
Lower Medium - Were steady to USC12 above previous levels to USC6 easier.
Plainer - Irregular interest and ranged between USC6 dearer to easier by up to USC12.

CTC QUOTATIONS	BP1 - USC	PF1 - USC
Best	270 - 530	285 - 368
Good	230 - 351	280 - 347
Good Medium	250 - 295	226 - 328
Medium (KTDA)	160 - 200	155 - 276
Medium (Plantations)	148 - 186	190 - 209
Lower Medium	134 - 180	125 - 190
Plainer	094 - 121	080 - 134

DUST GRADES (M1)

PDUST:

Best - Saw irregular enquiry and ranged between USC21 dearer to easier by up to USC23.
Brighter - Mostly dearer by up to USC17 but select invoices shed up to USC5.
Mediums - KTDA mediums were firm to USC4 dearer to mostly easier by up to USC8 with plantation mediums gaining by up to USC13.
Lower Medium - Were mostly dearer by up to USC7 but a few select lines shed up to USC6.
Plainer - Saw strong but irregular support ranging between USC18 above previous rates to easier by up to USC11.

DUST1:

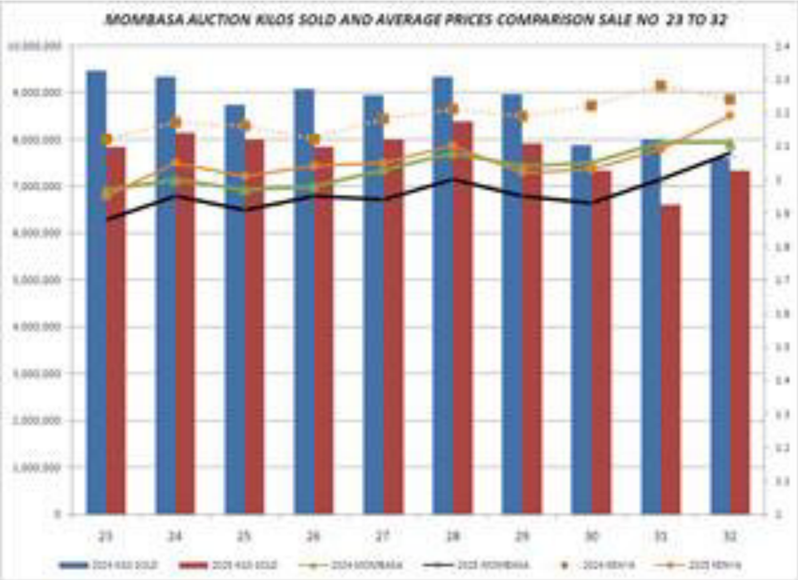
Best - Met irregular interest and varied between firm to USC8 above previous levels to easier by up to USC7.
Brighter - Were dearer by up to USC16.
Mediums - KTDA mediums met more irregular enquiry ranging between USC8 above previous rates to USC12 easier with plantation mediums up to USC4 dearer to USC7 below last levels.
Lower Medium - Up to USC7 dearer to easier by up to USC2.
Plainer - Some irregular interest varying between steady to USC7 dearer to USC5 below previous rates.

CTC QUOTATIONS	PDUST - USC	DUST1 - USC
Best	258 - 356	282 - 368
Good	247 - 289	275 - 305
Good Medium	225 - 268	257 - 300
Medium (KTDA)	165 - 230	170 - 276
Medium (Plantations)	175 - 214	168 - 190
Lower Medium	128 - 196	130 - 168
Plainer	088 - 128	088 - 122

SECONDARY GRADES (S1)

In the Secondary Catalogues, best BPs held value while others were dearer with PFs firm. Clean well sorted coloury Fannings remained steady with similar DUSTs firm. Other Fannings saw irregular interest while DUSTs tended dearer. BMFs were readily absorbed.

SECONDARY QUOTATIONS (USC)	BP / BP2	PF / PF2	FNGS1 / FNGS	DUST / DUST2	BMF
Best / Good	190 - 298	208	126 - 237	136 - 304	-
Good Medium / Medium	-	-	110 - 168	110 - 201	-
Lower Medium	124 - 167	098 - 146	098 - 133	083 - 127	090 - 110
Plainer	090 - 122	084 - 114	080 - 108	084 - 103	084 - 098



Courtesy - Africa Tea Brokers Limited.

BANGLADESH AUCTION

18TH AUGUST 2025 (SALE NO. 15)

CTC LEAF: 51,058 packages of tea on offer met with an improved demand.

BROKENS: All bright liquoring invoices met with a strong demand and prices were firm to dearer following competition. Medium Brokens met with a fairly good demand and were about steady whilst plain varieties were in fair demand at steady rates but there were several withdrawals. BLF teas met with less demand with many withdrawals.

FANNINGS: Good liquoring Fannings met with a strong demand and were generally firm to slightly dearer. Medium types met with a little more interest than last and prices were about steady. Plain types were again in less demand and there were more withdrawals in these categories. BLF teas met with less demand with many withdrawals.

DUST: 13,219 packages of tea on offer met with a fair demand with fewer withdrawals than last. Good liquoring Dusts sold at around last levels. Mediums again were an easier market with Tk.5/- to Tk.8/- less than last. Plain/BLF Dusts met with fair demand and had fewer withdrawals than last. Blenders lent strong support with fair interest from the Loose tea buyers.

COMMENTS: Market commenced on a strong note with greater participation from all sections of the market whereby bright descriptions advanced in line with quality. Both Blenders and Loose tea buyers were more active this week.

Dusts sold well with fewer withdrawals than last.
Our Catalogue: (Sale 15) Avg : Tk 245.81, Sold 74.17% , (Sale 14) Avg : Tk 245.93, Sold 72.47%

QUOTATIONS	*BROKENS*	*QUOTATIONS*	*FANNINGS*
Best	2.13-2.17	*Best*	2.09-2.13
Good	2.06-2.11	*Good*	2.04-2.08
Medium	2.04-2.06	*Medium*	2.02-2.04
Plain	2.02-2.03	*Plain*	2.02-2.03
BLF	1.54-1.85	*BLF*	1.57-1.84

Courtesy - National Brokers Limited.

TEA MARKETS AROUND THE WORLD

COONOOR AUCTION

18TH AUGUST 2025 (SALE NO. 33)

CTC LEAF

The total CTC leaf teas sold this week was 74.79%(1,144,350.11kgs) of the total offering of 1,530,153.07Kgs

DEMAND: - Good general demand.

MARKET: - The offerings in the best category were very modest this week and prices continued to be irregular and easier in line with quality. Good category teas saw a reduction in prices with fair amount of teas remaining unsold. Better medium category teas with irregular prices closely following quality. Medium & Plainer sorts sold at barely steady levels. Larger broken saw an easier trend this week.

BUYING PATTERN: - Major blenders & Western India packer lent fair support. Major blenders picked up 59.92% of the CTC Leaf sold. Regional packers were very choosy on all sorts. Internal buyers were selective. Russian and CIS exporters along with the Middle east shippers continued to be active. Iraqi shippers were fairly active.

ORTHODOX LEAF

Demand:- Selective Demand.
Market:- High grown:- whole leaf continues to sell irregularly following quality. Broken,met with selective demand with prices easier by Rs 2 to 5 or more. Others were Rs 2 to 5 easier. Fanning sold irregular and lower.

Buying Pattern:- CIS buyers were selective on cleaner blacker varieties along with Internal buyers.Middle east continued to fairly operate on select whole leaf grades and broken. Internal continued to be subdued.

CTC DUST

DEMAND: - Good demand.

MARKET: - CTC dust offer this week was at 386,992.95Kgs of which 323,972.78kgs were sold (83.72%). Best liquoring sorts sold irregularly easier in line with quality. Good teas were substantially easier with bolder dust facing withdrawals. Better medium teas sold dearer on blacker sorts, finer dust were barely steady to easier. Others sold firm to dearer.

BUYING PATTERN: - Major blenders were selective. Regional and local packers were selective on the best & good teas. Up country buyers were subdued. Exporters to Russia, Middle east continued to be active on blacker sorts.

ORTHODOX DUST

DEMAND: - Continued selective demand.

MARKET: - High grown primary dust fetched irregularly lower prices following quality with few lots facing out lots baring few select invoices sold dearer on competition. Clean, medium grown teas sold dearer whilst others were discounted. Secondaries were barely steady to easier.

BUYING PATTERN: -Regional & local packateers were selective on primary dusts. Exporters were very choosy at steady to easier prices on the secondary dusts.

Courtesy - J Thomas & Company Private Limited

TEA MARKETS AROUND THE WORLD

KOLKATA AUCTION

20TH AUGUST 2025 (SALE NO. 34)

	2025	2024	DIFFERENCE
CTC	1,08,870	63,710	45,160
ORTHODOX	70,688	43,915	26,773
DUST	54,136	36,086	18,050

KOLKATA SALE CTC MARKET
MARKET REPORT:
Market opened to good demand. Assams tending easier and selling at lower levels than last.
Plainer Dooars seen so far around last.
BUYING PATTERN:
Western India: Supporting the better teas on offer
HUL : Operating
TCPL: Selective
Other internal & Local: Operating
Exporters: Some enquiry
KOLKATA SALE ORTHODOX MARKET
MARKET REPORT:
Market opened to strong demand. Well made Whole Leaf and Brokens irregular around last.
Remainder Whole Leaf and Brokens irregular and at times tending lower following quality.
Fannings and Cleaner Secondaries around last levels.
BUYING PATTERN:
Middle East : Active
CIS: Good Support
HUL: Selective
TCPL: Operating
Courtesy - J Thomas & Company Private Limited

SILIGURI AUCTION

20th AUGUST 2025

	2025-2026	2024-2025	DIFFERENCE
CTC	153,738	136,481	17,257
DARJEELING	-	-	-
GREEN	-	-	-
DUST	19,561	15,520	4,041
TOTAL	173,299	152,001	21,298

STAC OFFERINGS IN PACKAGES (SALE NO 34)
DEMAND / MARKET DETAILS: Market opened to good demand. Nominal quantity of Good and Best sorts selling at irregular levels following quality. Medium and Plainer teas are irregular around last.

BUYING PATTERN:
Internal/ Local Packeteers: Mainstay
TCPL/HUL: Good Support
WI / Duncans: Operating

Courtesy - J. THOMAS & CO. PVT. LTD, SILIGURI

TEA MARKETS AROUND THE WORLD

COCHIN AUCTION

20TH AUGUST 2025 (SALE NO.34)

QUANTITY	2025 kgs	2024 kgs	Difference
ORX	2,41,258	1,67,698	(73,560)
CTC	29,275	32,939	(3,664)
TOTAL	2,70,533	2,00,637	(77,224)

ORTHODOX LEAF

MARKET:
Good demand.
Blacker, well made Whole-leaf types were fully firm to occasionally dearer, following quality;
Primary Brokens were irregular and occasionally lower;
Stalkier Secondarys and Fannings tended to be easier, witnessing few withdrawals. BUYING PATTERN:
M.E. - Active
C.I.S. - Good support HUL - Selective

CTC LEAF

MARKET:
Good demand.
All sorts were firm to dearer, especially the Fannings. BUYING PATTERN:
Major Blender - Absent Internal - Active Exporters - Very selective

Courtesy - J.T. COCHIN

MALAWI AUCTION

20TH AUGUST 2025 (SALE NO.34)

There was fair demand at irregular rates for the 3600 packages on offer.

BP1 - Few on offer sold 1USC above valuation.
PF1 were firm on last to 1USC easier where sold.
PD fetched 12USC below valuation where sold.
D1 were firm to 2USC easier on last.
PF1SC sold 10-15USC below valuation.
Secondary fngs were firm to dearer, respective dusts neglected.

Courtesy -TEA BROKERS CENTRAL AFRICA LIMITED

GUWAHATI AUCTION

11TH AUGUST 2025 (SALE NO.33)

Final Market Report

Market: CTC
There was fair general demand. All categories tended easier commensurate with quality and with noticeable withdrawals.

Buying Pattern: CTC.
There was fair enquiry from HUL and other blenders. Western India participated selectively. North India buyers and exporters operated.

Market: DUST
The dust market followed a similar trend to the leaf, prices being easier and with significant withdrawals.

Buying Pattern: DUST
There was fair support from HUL . Western India, north India buyers, other packeteers operated.

Courtesy -ASSOCIATED BROKERS PVT. LTD