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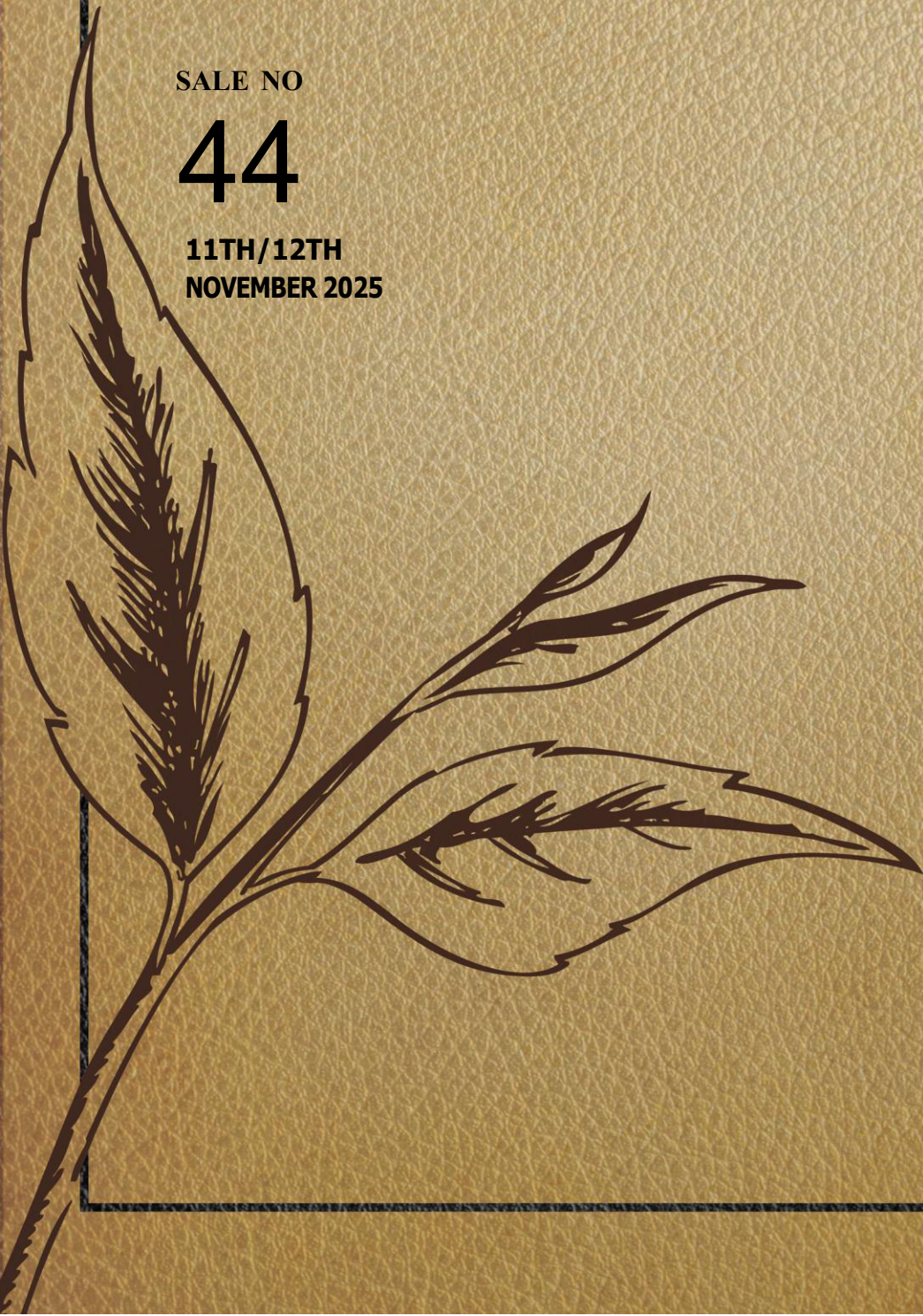
FORBES & WALKER TEA BROKERS PVT LTD

WEEKLY TEA MARKET REPORT

SALE NO

44

**11TH/12TH
NOVEMBER 2025**



Overall Market

	QTY (M/KGS)	DEMAND
Ex Estate	0.61	Good
High & Medium	0.55	Fair
Leafy	0.76	Fair
Semi Leafy	0.68	Fair
Tippy/Small Leaf	0.93	Fair
Premium Flowery	0.06	Fair
Off Grade	1.23	Fair
Dust	0.37	Irregularly Lower
Total	5.19	Fair general

ORDER OF SALE

SALE NO : 44

11TH/12TH NOVEMBER 2025

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

AUCTION DETAILS

AT THIS WEEK'S SALE 10,844 LOTS TOTALLING 5,189,077 KGS WERE ON OFFER. THE BREAKDOWN IS AS FOLLOWS:

	LOTS	QUANTITY
Ex Estate	645	613,866
Main Sale - High & Medium	1,323	553,663
Low Grown - Leafy	2,014	758,916
Low Grown - Semi Leafy	1,624	680,377
Low Grown - Tippy	2,003	927,762
Premium Flowery	409	57,090
Off Grades	2,396	1,229,939
Dust	430	367,464
Total	10,844	5,189,077
Re - Prints	1,017	512,551

SETTLEMENT DATES

14/11/2025 18/11/2025 19/11/2025

10% Payment

Buyers Prompt

Sellers Prompt

Quality

Westerns together with the Nuwara Eliyas were barely maintained, whilst the Uva/Uda Pussellawas and Low Grown were similar to last.

COMMENTS

Auction offerings totalled 5.2 M/Kgs, marginally below the previous week.

Quality: Overall, fairly similar and showed no significant change.

Demand: Improved demand for the liquoring teas, whilst the others met with fair demand.

Ex-Estate offerings totalled 0.61 M/Kgs, marginally below the 0.68 M/Kgs on offer the previous week. Quality of teas were fairly similar to last. Improved demand, more so at the lower end of the market.

Best Western BOP's, where quality was maintained, were firm and appreciated by Rs. 50-100 per kg and more for select large leaf teas. Corresponding BOPF's, where quality was maintained, appreciated by Rs. 50 per kg, whilst the others were generally firm. In the Below Best category, improved BOP's appreciated by Rs. 50 per kg, whilst the others were generally firm. Corresponding BOPF's commenced Rs. 20 per kg dearer and appreciated further by Rs. 20-40 per kg and more towards the close. At the lower end, clean leaf coloury BOP's were Rs. 20-40 per kg dearer, whilst the others were generally firm. Corresponding BOPF's at the commencement were firm and Rs. 20 per kg dearer, and appreciated by a further Rs. 20 per kg as the sale progressed. Nuwara Eliya BOP/BOPF's sold around last levels, whilst the Leafy types were often neglected and remained unsold. Uva/Uda Pussellawa BOP's gained by up to Rs. 100 per kg, whilst the corresponding BOPF's gained by up to Rs. 50 per kg.

High & Medium CTC teas continued to sell around last levels, whilst the corresponding Low Grown types were marginally easier.

Hardly any activity from shippers to the UK and the continent. Improved activity from shippers to China, Japan and the CIS together with some selective interest from shippers to the Middle East.

Low Grown totalled approximately 2.4 M/Kgs with fair demand witnessed in the Leafy, Semi-Leafy, Tippy and Premium categories.

Well-made OP1's and BOP1's continued to sell well, whilst the balance were irregular. OP/OPA's, in general, were firm. High-priced PEK/PEK1's declined, whilst the balance were irregular following quality.

FBOP's sold at last levels, whilst the Tippy teas together with the FF1's appreciated.

Shippers to the CIS and Middle East continued to participate in the usual manner, whilst there was improved activity from shippers to Iran.

World Tea News

Kenyan tea crop fell by 11.5% in first seven months

Kenya's tea production fell by 11.5% in the first seven months of 2025 to 322.29 million kilograms, down from 364.13 million kilograms during the same period in 2024.

The decline was largely attributed to extended dry and cold weather conditions that suppressed yields across major tea-growing regions. In July alone, production dropped by 4.37% year-on-year to 39.04 million kilograms. The East of Rift region saw a sharper decline of 9.8%, while the West of Rift recorded a smaller 2.8% decrease. Factories managed by the Kenya Tea Development Agency (KTDA) experienced the steepest fall of 13.7%.

Rainfall levels averaged below 12 millimeters per day in some tea zones, coupled with low temperatures ranging between 8°C and 21°C, resulting in reduced crop performance.

The impact of lower output extended to the Mombasa auction, where tea sales dropped 25.6% year-on-year to 25.41 million kilograms in July. The average auction price declined to US\$2.05 per kilogram from US\$2.21 a year earlier, while prices in Kenyan shillings averaged Kes 264.89 per kilogram, reflecting a 7.7% decrease.

Despite the price drop, market absorption improved to 55% from 40% in the previous year due to wider quality differentials. Smallholder teas fetched a higher average of US\$2.32 per kilogram but remained below the US\$2.77 recorded in July 2024.

Demand from key markets such as the UK, Russia, and Sudan remained weak, though Pakistan maintained steady purchases, accounting for 36% of Kenya's tea exports at 20.06 million kilograms.

In July, tea exports rose 5% year-on-year to 55.57 million kilograms. However, cumulative exports for the review period declined 7% to 330.19 million kilograms, influenced by reduced global demand, shipping delays along the Red Sea, and lower European buying.

It is projected that total tea production in 2025 will reach about 553 million kilograms, down from 594 million kilograms in 2024.

To boost export earnings, the first-ever auction for orthodox teas was introduced, featuring 2,925 packages, about 91,800 kilograms, expected to attract bids between US\$3 and US\$10 per kilo.

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

HIGHLIGHTS OF SRI LANKA NATIONAL BUDGET FOR 2026

Hon. President Anura Kumara Disanayake, in his capacity as the Minister of Finance presented the 80th National Budget of the Democratic Socialist Republic of Sri Lanka on the 7 November 2025. Broadly it was a budget of staying the course with revenue, reforms and discipline. No significant changes were made with regard to taxes and levies. The granting of concessions was limited to the changes to be legislated in the Strategic Development Projects Act and the Colombo Port City Economic Commission Act. There was emphasis on the digital economy with substantial allocation of funds to that end.

The budget deficit is seen widening as a result of a substantial increase in the planned capital expenditure. The growth in the revenue is marginal and swallowed up by the increase in the recurrent expenditure. The deficit is financed by borrowings which still places the economy on a fragile footing. Therefore, proper revenue administration and SOE reform with cost reflective pricing by the major utility providers is key in 2026 as well.

Macro level budget statistics: (Rs. Bn)

	Budget 2026	Provisional 2025	Inc / (Dec)
Total Revenue	5,300	5,100	3.9%
> Of which Tax Revenue	4,910	4,725	3.9%
> Tax revenue as a % of total revenue	92.6%	92.6%	
Total Expenditure	7,057	6,548	7.7%
> Recurrent expenditure excluding interest	3,071	2,880	6.6%
> Interest expenditure	2,617	2,650	(1.2%)
> Capital expenditure	1,380	1,033	33.5%
Budget Deficit	(1,757)	(1,448)	21.3%
> Of which net foreign borrowing	235	200	
> net local borrowing	1,522	1,248	

The Sri Lankan per capita income which stood at USD 816 in the year 2000, doubled to USD 1,638 in 2010. We were set to double it once again in 2020, with 2019 having ended at USD 3,088. Unfortunately following Covid and the economic crisis, the GDP in 2020 slipped to USD 2,701. However, there is hope that we could still reach USD 4,000 by 2026 with another 5% growth planned for next year.

From a tea industry perspective, the proposals which would have a significant impact are:

- It is proposed to increase the minimum daily wages of the estate workers from Rs. 1,350 to Rs. 1,550, while the Government pays Rs. 200 as a daily attendance incentive. The cost to the state was estimated at Rs. 5 billion next year. On that basis the cost to the RPCs could be estimated at Rs. 6 billion without considering the gratuity top up. The impact on the small and medium estates would also be significant if they are forced to follow the RPC wage rate with no Government subsidy.
- It is proposed to reduce the annual turnover threshold for the registration from Rs. 60 Million to Rs. 36 Million for Value Added Tax (VAT) and Social Security Contribution Levy (SSCL) effective 1 April 2026. This proposal would benefit the local market players with a more level playing field.

(E & OE)

CROP AND WEATHER

FOR THE PERIOD 04 - 11 November 2025

Western/Nuwara Eliya Regions



Bright weather was reported in both regions throughout the week. Showers are expected in the Western and Nuwara Eliya regions in the week ahead according to the Department of Meteorology.

Uva/Udapussellawa Regions



Sunny weather was reported in the Uva and Uda Pussellawa regions throughout the week. According to the Department of Meteorology, showers are expected in both regions in the week ahead.

Low Grown



Bright mornings and evening showers were reported in the Low Grown Region throughout the week. According to the Department of Meteorology, intermittent showers are expected in the Low Grown Region in the week ahead.

Crop

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



HIGH GROWN TEAS

■ Incline from last week
■ Decline from last week
■ Static Market

BOP

Best Western's, where quality was maintained, were firm and appreciated by Rs. 50-100 and more for select large leaf teas. In the Below Best category, improved teas appreciated by up to Rs. 50 per kg, whilst the others were generally firm. At the lower end, clean leaf coloury sorts were Rs. 20-40 per kg dearer, whilst the others were firm. Nuwara Eliya's sold around last week's levels. Uva/Uda Pussellawa's gained by up to Rs. 100 per kg.

BOPF

Best Western's, where quality was maintained, appreciated by up to Rs. 50 per kg, whilst the others were generally firm. Teas in the Below Best category which commenced Rs. 20 per kg dearer, gained by Rs. 20-40 per kg and more towards the close. At the commencement of the sale, teas at the lower end were firm and up to Rs. 20 per kg dearer, and appreciated by a further Rs. 20 per kg by the close. Nuwara Eliya's sold around last. Uva/Uda Pussellawa's gained by Rs. 50 per kg.

OP/OPA

Well-made varieties were firm to easier by Rs. 20 per kg, whilst the Below Best types declined by Rs. 20-40 per kg. Poorer sorts were easier by Rs. 40-60 per kg and more, at times.

PEKOE/PEKOE1

Flavoury PEK/PEK1's were unsellable, whilst the Orthodox Leafy Best PEK's were easier by Rs. 30-50 per kg. Below Best and others were irregularly lower by Rs. 20-40 per kg. Best PEK1's were firm to dearer by Rs. 50 per kg, whilst the Below Best varieties declined by Rs. 20-40 per kg. Rotovane PEK's - A few select Best PEK's gained by Rs. 50 per kg following special inquiry, whilst the others sold at last levels. Below Best gained by Rs. 20-40 per kg, whilst the poorer sorts gained further.

FBOP/FBOPF1

Flavoury FBOP/FBOPF1's were difficult of sale. Better Orthodox FBOP/FBOPF1's were firm on last levels, whilst the others and teas at the lower end were marginally lower by Rs. 20-40 per kg.

QUOTATIONS LKR SALE DTE	BOP		BOPF		PEKOE/FBOP		OP	
	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov
Best Westerns	1280-1380	1340 - 1480	1280-1420	1300 - 1600	1300-1600	1280 - 1500	1100-1240	1140 - 1280
Below Best Westerns	1140-1260	1200 - 1320	1200-1260	1240 - 1280	1180-1280	1200 - 1220	1040-1080	1040 - 1060
Plainer Westerns	1060-1120	1100 - 1180	1080-1180	1100 - 1220	880-1140	1020 - 1060	810	800 -
Nuwara Eliyas	1240	N/A	1200-1220	1200 - 1220	1040	1140 -	N/A	960 -
Brighter Udapussellawas	1080-1100	1160 - 1200	1180-1200	1180 - 1260	1320	1380 - 1420	1020-1140	1000 - 1080
Other Udapussellawas	1040-1060	1020 - 1120	1100-1140	1100 - 1160	900-960	1100 -	810	650 - 960
Best Uvas	1200-1440	1240 - 1420	1140-1200	1220 - 1300	1340-1600	1260 - 1500	1040-1240	1060 - 1220
Other Uvas	800-1080	820 - 1040	850 - 920	850 - 920	790-1320	810 - 1240	900-1020	740 - 1000

MEDIUM GROWN TEAS

■ Incline from last week
■ Decline from last week
■ Static Market

BOP Firm.

BOPF Firm and Rs. 20 per kg dearer.

OP/OPA Well-made teas were firm to easier by Rs. 20 per kg, whilst the Below Best types were easier by Rs. 20-50 per kg. Teas at the lower end declined further.

PEKOE/PEKOE1 Select Best PEK1's were firm on last levels. PEK's were easier by Rs. 40-60 per kg. Best and Below Best PEK1's were firm to dearer by Rs. 50 per kg, whilst the other PEK/PEK1's eased by Rs. 20-30 per kg.

FBOP/FBOPF1 A few Select Best FBOP/FBOPF1's were dearer by Rs. 50-100 per kg, whilst the others were dearer by Rs. 30-50 per kg. Best and Below Best varieties were firm to easier by Rs. 20 per kg, whilst the teas at the lower end declined by Rs. 20-40 per kg.

QUOTATIONS LKR SALE DTE	BOP		BOPF		PEKOE/FBOP		OP	
	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov
Good Mediums	1380-1900	1650 - 1950	1200-1260	1140 - 1280	1380-1800	1340 - 2200	1040-1280	1080 - 1300
Other Mediums	1020-1180	1040 - 1240	880-1020	880 - 1040	820-1360	810 - 1320	610-1020	650 - 1060

UNORTHODOX / CTC TEAS

HIGH GROWN BP1s - Hardly any offerings. PF1s - Sold around last.

MEDIUM GROWN BP1s - Hardly any offerings. PF1s - Better sorts were irregular, whilst the others were generally firm.

LOW GROWN BP1s - Irregular. PF1s - Irregular and Rs. 20 per kg easier.

QUOTATIONS LKR SALE DTE	BP1		PF1	
	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov
High Grown	N/A	N/A	1100-1160	1080 - 1160
Medium Grown	N/A	1100 - 1140	1040-1180	1020 - 1180
Low Grown	1420	1380 -	1260-1460	1800 - 1480

OFF GRADES

■ Incline from last week
■ Decline from last week
■ Static Market

FGS1/FGS

Select Best varieties which commenced firm, appreciated by Rs. 25-50 per kg as the sale progressed, whilst the Best varieties together with the Below Best sorts were dearer by Rs. 20-40 per kg following quality. Teas at the lower end of the market met with good demand. Low Grown - In general were firm to dearer by Rs. 10-20 per kg. CTC- In general, were firm on last.

BROKENS

Reducer varieties in the Best category together with the clean leaf sorts were firm to selectively dearer, whilst the Below Best sorts, where quality was not maintained commenced firm and declined by Rs. 20-30 per kg as the sale progressed. Cleaner bottoms appreciated by Rs. 20 per kg, whilst the others declined sharply.

BOP1A

Main Grade reducer varieties in the Best category gained by Rs. 50-100 per kg, whilst the Below Best sorts where quality was maintained were firm. Mixed varieties were easier by Rs. 10-20 per kg, whilst the poorer sorts maintained.

QUOTATIONS LKR

SALE DTE	HIGH		MEDIUM		LOW	
	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov
Better Fannings (Orthodox)	850-1260	850 - 1260	840-1080	840 - 1160	840-1000	830 - - 980
Better Fannings (CTC)	N/A	N/A	840	840 -	770-1380	850 - 1200
Other Fannings (Orthodox)	600-830	600 - 820	590-830	560 - 830	530-780	530 - - 820
Other Fannings (CTC)	N/A	N/A	600-730	610 - 770	500-720	600 - 770
Good Brokens	730-1000	750 - 1000	730-1040	750 - 1220	750-1300	760 - 1240
Other Brokens	610-720	580 - 740	600-720	600 - 740	450-740	520 - 750
Better BOP1As	800-920	800 - 880	800-1180	800 - 1180	800-1420	800 - - 1600
Other BOP1As	740-790	760 - 790	620-780	630 - 780	620-780	600 - 800

DUSTS

DUST1

Teas in the Select Best and Best categories declined by Rs. 20-40 per kg. Teas in the Below Best category remained firm, whilst the poorer sorts were firm to dearer by Rs. 20 per kg. Low Grown teas remained firm. High and Medium Grown CTC's sold around last week's price levels, whilst the Low Grown were firm to dearer by Rs. 20-40 per kg.

DUST

Clean leaf secondaries were dearer by Rs. 20-30 per kg, whilst the poorer sorts remained firm. Low Grown varieties sold around last week's price levels.

QUOTATIONS LKR

SALE DTE	HIGH		MEDIUM		LOW	
	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov
Better Primary Dust (Orthodox)	1200-1480	1200 - 1550	1060-1200	1040 - 1160	920-1020	900 - 1000
Better Primary Dust (CTC) P. Dust	1100-1140	1120 - 1160	1100-1140	1120 - 1180	1160-1380	1180 - 1480
Below Best Primary Dust (Orthodox)	1000-1180	1100 - 1200	860-1040	870 - 1020	810-900	830 - 900
Other Primary Dust (CTC) P. Dust	1020-1180	1100 - 1120	850-1080	940 - 1100	920-1140	900 - 1160
Other Primary Dust (Orthodox)	780-980	1060 - 1100	540-850	570 - 860	550-800	600 - 820
Better Secondary Dust	1040-1160	1080 - 1320	920-1060	920 - 1020	940-1060	900 - 960
Other Secondary Dust	650-1020	600 - 1060	500-900	550 - 900	550-920	500 - 880

LOW GROWN TEAS

■ Incline from last week
■ Decline from last week
■ Static Market

FBOP/FBOP1	Select Best FBOP's sold around last levels, whilst the Best and Below Best varieties were firm to easier following quality. Teas at the lower end sold around last levels. FBOP1's, in general, were firm.
BOP	BOP's, in general, were dearer.
BOP1	BOP1's, in general, were firm.
OP1	Select Best and Best OP1's together with the cleaner Below Best appreciated, whilst the balance were irregular following quality.
OP	Well-made OP's together with the teas at the bottom were firm, whilst the teas in the Below Best category eased.
OPA	OPA's, in general, were firm.
PEKOE	Well-made PEK's declined, whilst the Below Best and teas at the bottom maintained. High-priced PEK1's were easier, whilst the Best appreciated. However, the Below Best and teas at the bottom were irregularly lower.
BOPF	High-priced BOPF's were firm to dearer, whilst the balance were firm.
FBOPF/FBOPF1	Very Tippy teas met with good demand and were dearer, whilst the Best and Below Best too followed a similar trend. The teas at the bottom were firm. FF1's, in general, were firm to dearer.

QUOTATIONS LKR SALE DTE	SELECT BEST		BEST		BELOW BEST		OTHERS	
	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov	03/04 Nov	11/12 Nov
FBOP 1	1700-1900	1650 - 1800	1400-1450	1450 - 1500	1200-1250	1250 - 1300	900-1000	950 - 1000
FBOP	1900-2500	1900 - 2550	1500-1550	1500 - 1550	1250-1300	1250 - 1300	900-950	900 - 950
BOP 1	2350-3000	2350 - 3000	1750-2250	1750 - 2250	1200-1400	1240 - 1400	900-1100	900 - 1100
BOP	1900-2000	2000 - 2300	1450-1500	1500 - 1550	1200-1250	1200 - 1250	900-1000	900 - 1000
BOPF	1400-1500	1400 - 1600	900-1000	900 - 1000	850-900	850 - 900	800-850	800 - 850
FBOPF (TIPPY)/FBOPF SP	4800-5800	5000 - 6000	3300-4200	3400 - 4300	2400-2800	2500 - 2900	1000-1100	1000 - 1100
FBOPF 1	1550-1700	1550 - 1700	1400-1450	1400 - 1450	1250-1300	1250 - 1320	950-1000	950 - 1000
FBOPF	1550-1650	1600 - 1800	1350-1450	1400 - 1450	1150-1200	1200 - 1250	900-950	900 - 950
OP 1	2700-3400	2700 - 3400	2450-2650	2450 - 2650	1420-2350	1500 - 2350	900-1360	900 - 1420
OP	1480-1600	1480 - 1800	1420-1460	1420 - 1460	1320-1400	1300 - 1400	900-1300	900 - 1280
OPA	1500-1900	1500 - 1900	1360-1480	1360 - 1480	1280-1340	1260 - 1340	900-1260	900 - 1240
PEKOE	1480-2350	1440 - 2250	1360-1460	1360 - 1420	1260-1340	1260 - 1340	900-1260	850 - 1240
PEK 1	1850-2450	1900 - 2400	1550-1800	1600 - 1850	1360-1500	1340 - 1500	1000-1340	900 - 1320

TOP PRICE

WESTERN MEDIUM			
Galgewatta	BOP		1950
Dartry Valley	BOP	@	1850
Harangalla	BOP	@	1700
Ancoombra	BOPSp		1500
Vellai Oya	BOPF/BOPFSp		1280
Dartry Valley	BOP1	@	2150
Harangalla	BOP1	@	1950
Dartry Valley	FBOP/FBOP1	@	2200
Craighead	FBOP/FBOP1	@	1900
Harangalla	FBOP/FBOP1	@	1750
Craighead	FBOPF/FBOPF1	@	1650
Dartry Valley	FBOPF/FBOPF1	@	1600
Harangalla	FBOPF/FBOPF1	@	1550
Meezan	OP/OPA		1300
Hatale	OP/OPA		1300
Galgewatta	OP/OPA		1300
Craighead	OP/OPA	@	1260
New Rothschild	OP/OPA		1260
Dartry Valley	OP1	@	1500
Harangalla	OP1	@	1420
New Rothschild	OP1		1420
Hansagiri Kothmale	OP1		1420
Craighead	PEK/PEK1	@	1950
Dartry Valley	PEK/PEK1	@	1950
Pupuressa	PEK/PEK1		1950
Meezan	PEK/PEK1		1950
Harangalla	PEK/PEK1		1950
Galgewatta	PEK/PEK1		1950
Rilagala	PEK/PEK1	@	1900
Elkaduwa	PEK/PEK1		1900
New Rothschild	PEK/PEK1		1900
WESTERN HIGH			
Gouravilla	BOP		1480
Ingestre	BOP	@	1460
Annfield	BOPSp	@	1650
Bearwell	BOPSp	@	1650
Gouravilla	BOPSp	@	1500
Somerset	BOPSp	@	1500
Kotiyagalla	BOPSp		1500
Ingestre	BOPF/BOPFSp	@	1600
Glenloch	BOP1	@	1440
Inverness	FBOP/FBOP1		1500
Queensberry	FBOP/FBOP1	@	1440
Bambrakelly	FBOP/FBOP1		1440
Glenloch	FBOPF/FBOPF1	@	1480
Inverness	FBOPF/FBOPF1		1480
Venture	OP/OPA		1280
New Meddecombra	OP/OPA		1280
Glenloch	OP1	@	1400
Frotoft Super	PEK/PEK1		1700
NUWARA ELIYAS			
Kenmare	BOPSp		1280

NUWARA ELIYAS			
Lovers Leap	BOPF/BOPFSp		1220
Mahagastotte	BOPF/BOPFSp	@	1200
Kenmare	OP/OPA		1000
Kenmare	PEK/PEK1		1400
UDAPUSSELLAWAS			
High Forest	BOP		1200
Kirklees	BOP		1200
Liddesdale	BOP		1200
Mooloya	BOPSp		1200
Luckyland	BOPF/BOPFSp		1260
Liddesdale	BOPF/BOPFSp	@	1200
High Forest	BOPF/BOPFSp	@	1200
Maha Uva	FBOP/FBOP1	@	1480
Delmar	FBOPF/FBOPF1	@	1380
Maha Uva	OP/OPA	@	1180
Delmar	PEK/PEK1	@	1700
LOW GROWNS			
Rumassala Hills	BOP		2500
Mahaliyadda	BOP		2500
New Nivithigala	BOP		2500
Elaine Super	BOPSp		2700
Uruwala	BOPF	@	1650
Ayagama	BOPFSp		2500
Gunawardana	FBOP	@	2550
Kiruwana ganga	FBOP1	@	1800
New Deniyaya	FBOP1	@	1800
Dullie Ella	FBOP1	@	1800
Navinda	FBOP1		1800
Susantha	FBOP1		1700
New Nivithigala	FBOP1		1700
Morawakkorale	FBOP1	@	1650
Kings Bru	FBOP1		1650
Ganganee	FBOP1		1650
Andaradeniya Super	FBOP1		1650
Katanwila	FBOPF		2050
Rajjuruwatta Super	FBOPF1		2050
Gunawardana	FBOPF1	@	1700
Makandura	FBOPF1		1700
Pothotuwa	FBOPF1	@	1650
Kumudu	FBOPF1		1650
Rain Forest	FBOPF1		1650
Garden Leaf Super	FBOPF1		1650
Pothotuwa	BOP1	@	3000
Pothotuwa	OP1	@	3400
Gunawardana	OP1	@	3100
Kolonna Super	OP1	@	2900
Mulatiyana Hills	OP1		2900
Green Lanka	OP1		2900
Miriswatta	OP		1800
Lions	OPA		1900
Lucky Dais	OPA		1900
Lumbini	PEK		2250
Lions	PEK1		2400

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

UVA MEDIUM			
Pettiagalla	BOP		1420
Maratenne	BOP		1420
Halpewatta Uva	BOPSp		1700
Dickwella	BOPF/BOPFSp	@	1500
El Teb	BOPF/BOPFSp	@	1280
Dickwella	BOP1	@	1850
Misty Uva	FBOP/FBOP1	@	1550
Sarnia Plaiderie	FBOP/FBOP1	@	1500
Aruna Passara	FBOP/FBOP1		1500
Telbedde	FBOP/FBOP1	@	1460
Sarnia Plaiderie	FBOPF/FBOPF1		1480
Misty Uva	FBOPF/FBOPF1	@	1440
Aruna Passara	FBOPF/FBOPF1		1440
Hindagala	FBOPF/FBOPF1		1440
Sarnia Plaiderie	OP/OPA	@	1280
Hindagala	OP/OPA		1280
Misty Uva	OP/OPA	@	1260
Pettiagalla	OP/OPA		1260
High Spring	OP/OPA		1260
Dickwella	OP1		1800
Telbedde	OP1	@	1480
Misty Uva	OP1	@	1420
Dickwella	PEK/PEK1	@	1950

UVA HIGH			
Nayabedde	BOP	@	1260
Bandaraeliya	BOP	@	1260
Battawatte	BOPSp		890
Kelliebedde	BOPF/BOPFSp	@	1300
Nayabedde	BOPF/BOPFSp	@	1260
Bandaraeliya	BOPF/BOPFSp	@	1260
Uva Highlands	BOP1		1650
Uva Highlands	FBOP/FBOP1	@	1500
Gonamotawa	FBOP/FBOP1	@	1440
Uva Highlands	FBOPF/FBOPF1	@	1500
Gonamotawa	FBOPF/FBOPF1	@	1440
Uva Highlands	OP/OPA		1220
Ellathota Uva	OP1		1440

UVA HIGH			
Needwood Super	PEK/PEK1		1950
UNORTHODOX HIGH			
Dunsinane CTC	PF1	@	1160
UNORTHODOX MEDIUM			
Strathdon CTC	PF1	@	1180
Strathdon CTC	BP1		1140
UNORTHODOX LOW			
Hingalgoda CTC	PF1		1480
Ceciliyan CTC	BP1		1380
PREMIUM FLOWERY			
New Batuwangala	FBOPFSp		6350
Samvin	FBOPFSp		6000
Adams View	FBOPFSp	@	5400
New Batuwangala	FBOPFExSp		6350
Dullie Ella	FBOPFExSp	@	5600
New Deniyaya	FBOPFExSp1	@	4800
Fortune	FBOPFExSp1	@	4600
Muswenna	FBOPFExSp1	@	4350
DUSTS			
Mattakelle	DUST1		1550
Ceciliyan CTC	PD	@	1480
OFF GRADES			
Wanarajah	FGS/FGS1	@	1260
Wattegodde	FGS/FGS1	@	1260
Holyrood	FGS/FGS1	@	1260
Gouravilla	FGS/FGS1	@	1220
Henfold	FGS/FGS1	@	1220
Agraouvah	FGS/FGS1	@	1220
Campion	FGS/FGS1		1220
Liyonta CTC	PF		1200
Lakshmi	BM		1180
Chandrika Estate	BP	@	1240
Bogoda	BP		1240
Kothmale Hills	BP	@	1220
Aldora	BP	@	1200
Aldora	BOP1A	@	1600
Chandrika Estate	BOP1A	@	1500

QUANTITY SOLD

DURING THE PERIOD 01ST-04TH NOVEMBER 2025	WEEKLY (KGS)		TODATE (KGS)	
	2025	2024	2025	2024
PRIVATE SALES	134,264	173,299	9,033,346	5,665,178
PUBLIC AUCTION	4,605,134	4,870,545	211,071,443	205,924,381
FORWARD CONTRACTS	20,000	63,050	2,085,259	2,148,336
DIRECT SALES	NIL	NIL	NIL	NIL
TOTAL	4,759,398	5,106,894	222,190,048	213,737,895
BMF EXCLUDED FROM PRIVATE SALE	28,800	7,200	2,688,505	1,953,504

(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
29TH OCTOBER 2025	4.32	4.73	4.31	1193.80	1165.48	1142.89	3.97	4.04	3.56
04TH NOVEMBER 2025	4.60	4.87	4.50	1184.49	1153.97	1142.05	3.94	3.99	3.54

Source: Central Bank of Sri Lanka / Buying Rates

RATES OF EXCHANGE

SRI LANKA RUPEE APPROX PER UNIT OF CURRENCY

YEAR	2025	2024	2023
USD	300.50	288.54	321.59
STG.PD	349.30	371.41	395.57
EURO	345.78	309.42	342.73
YEN	1.93	1.86	2.13

Source: Central Bank of Sri Lanka / Buying Rates

PUBLIC AUCTION/GROSS SALES AVERAGE

SALE NO 43 03RD/ 04TH OCTOBER 2025	WEEKLY(LKR)			TODATE (LKR)			WEEKLY(USD)			TODATE(USD)		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
Uva High Grown	1049.93	1010.05	932.26	1042.37	1105.38	982.75	3.49	3.49	2.89	3.50	3.66	3.01
Western High Grown	1194.92	1158.19	991.96	1118.10	1189.43	1122.62	3.97	4.01	3.08	3.75	3.94	3.43
CTC High Grown	1133.52	1018.64	963.50	1083.24	1094.88	999.81	3.77	3.52	2.99	3.64	3.62	3.06
High Grown (Summary)	1155.48	1113.67	972.12	1093.77	1162.13	1078.46	3.84	3.85	3.02	3.67	3.85	3.30
Uva Medium Grown	1060.24	1019.32	999.48	1069.10	1130.89	1027.79	3.53	3.53	3.10	3.59	3.74	3.14
Western Medium Grown	980.42	953.39	956.32	1007.61	1056.44	990.16	3.26	3.30	2.97	3.38	3.50	3.03
CTC Medium Grown	935.85	916.93	868.02	944.68	969.44	915.84	3.11	3.17	2.69	3.17	3.21	2.80
Medium Grown (Summary)	1001.76	974.22	970.50	1026.97	1081.25	1001.98	3.33	3.37	3.01	3.45	3.58	3.07
Orthodox Low Grown	1261.07	1228.68	1253.08	1263.96	1360.72	1283.11	4.19	4.25	3.89	4.24	4.50	3.93
CTC Low Grown	983.20	932.52	1018.63	980.09	992.70	972.40	3.27	3.23	3.16	3.29	3.29	2.98
Low Grown(Summary)	1243.94	1210.82	1238.08	1247.66	1337.52	1265.50	4.14	4.19	3.84	4.19	4.43	3.87
Total	1184.49	1153.97	1142.05	1178.49	1257.09	1181.48	3.94	3.99	3.54	3.96	4.16	3.62

Source: Oanda Exchange Rates

Source: MSL - Averages

WORLD TEA PRODUCTION (M/KGS)

				TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
Sep								
Sri Lanka	18.9	24.4	22.2	193.5	196.9	199.1	3.4	2.2
North India	143.4	147	138.6	812	754.4	794.9	-57.6	40.5
South India	24.3	23	21.3	178.2	164.4	174.6	-13.8	10.2

				TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
Aug								
Bangladesh	14.5	13.8	13.6	54.7	49.5	49.5	-5.2	0
Malawi	0.9	1.6	1.4	32.7	36.4	34.4	3.7	-2

				TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
	Jul							
Kenya	44.7	40.8	39	318.3	364.1	322.3	45.8	-41.8



DETAILS OF AWAITING SALE

SALE NO : 45

Scheduled for 18TH/19TH NOVEMBER 2025

	LOTS	QUANTITY
ExEstate	687	656,023
High & Medium	1,314	549,744
Leafy	1,930	713,541
Semi Leafy	1,568	656,342
Tippy	1,868	879,111
Premium Flowery	352	47,787
OffGrades	2,135	1,094,373
Dust	452	374,390
Total	10,306	4,971,311
RePrint	759	375,089

25/11/2025

Buyers Prompt

26/11/2025

Sellers Prompt

**This sale last year
Sale No. 45 | 11TH/12TH NOVEMBER 2024**

Lots :10,836
Re-print Lots :1,207
Quantity :5,415,834 kgs
Re-print Quantity :600,144 kgs

LOW GROWN CATALOGUES

Violations Excluded

30/10/2025

LEAFY
Closed

SEMI-LEAFY
Closed

TIPPY
Closed

OTHER MAIN SALE CATALOGUES

30/10/2025

HIGH & MEDIUM
Closed

PREMIUM FLOWERY
Closed

OFF GRADES
Closed

NO .OF PKGS
134,363

CTC
8,565 Pkgs - 457,307 kgs

ORDER OF SALE

Ex-Estate	LG Large Leaf//Semi Leafy/LG Small Leaf/BOP1A/ Premium	High & Medium/Off Grade /Dust	Approx Selling time of F&W Catalogues	
EB	BC	JK	18TH	
BC	CTB	AS	NOVEMBER 2025	
LC	EB	MB	11.00am	Main Sale - High & Medium
CTB	JK	FW	2.30pm	Semi - Leafy Teas
MB	AS	BC	3.30pm	Low Grown - Leafy Teas
JK	LC	LC	3.30pm	Low Grown - Tippy Teas
AS	MB	CTB	5.00pm	BOP1A
FW	FW	EB		
19TH			NOVEMBER 2025	
BC - BPML Produce Marketing (Pvt) Ltd	FW - Forbes & Walker Tea Brokers (Pvt) Ltd		9.30am	Premium Flowery
LC - Lanka Commodity Brokers Ltd	AS - Asia Siyaka Commodities PLC		10.00am	Off Grade
EB - Eastern Brokers Ltd	JK - John Keells PLC		10.45am	Ex-Estate
CTB - Ceylon Tea Brokers PLC	MB - Mercantile Produce Brokers (Pvt)Ltd		1.30pm	Dust

DETAILS OF AWAITING SALE

SALE NO : 46

Scheduled for 25TH/26TH NOVEMBER 2025

	LOTS	QUANTITY
ExEstate	781	753,204
High & Medium	1,557	646,918
Leafy	2,105	805,819
Semi Leafy	1,800	777,765
Tippy	2,103	1,007,946
Premium Flowery	434	56,214
OffGrades	2,400	1,250,106
Dust	550	464,219
Total	11,730	5,762,191
RePrint	825	410,849

02/12/2025

Buyers Prompt

03/12/2025

Sellers Prompt

This sale last year
Sale No. 46 | 19TH/20TH NOVEMBER 2024

Lots	:11,379
Re-print Lots	:1,067
Quantity	:5,639,666 kgs
Re-print Quantity	:573,170 kgs

LOW GROWN CATALOGUES

Violations Excluded

07/11/2025

LEAFY
Closed

SEMI-LEAFY
Closed

TIPPY
Closed

OTHER MAIN SALE CATALOGUES

07/11/2025

HIGH &
MEDIUM
Closed

PREMIUM
FLOWERY
Closed

OFF
GRADES
Closed

NO .OF PKGS
154,987

CTC
10,070 Pkgs - 540,622 kgs

CATALOGUE CLOSURE DETAILS

25/26

NOVEMBER 2025

Sale No. 46

The Ex-Estate catalogue closed on 07th November 2025, excluding violations. The Main Sale catalogues too closed on 07th November 2025, excluding violations.

01/02

DECEMBER 2025

Sale No. 47

The Ex-Estate and Main Sale catalogues are scheduled to close on 13th November 2025.

09/10

DECEMBER 2025

Sale No. 48

The Ex-Estate and Main Sale catalogues are scheduled to close on 20th November 2025.

TEA MARKETS AROUND THE WORLD

MOMBASA AUCTION

10TH AND 11TH NOVEMBER 2025 (SALE NO.45)

There was good but irregular general demand for the 158,261 packages (10,711,554.00 kilos) available in the market with 24.00% unsold.

MARKETS

Pakistan Packers maintained strong support with improved interest from Yemen, other Middle Eastern countries and Bazaar. Kazakhstan and other CIS states lent less enquiry while Afghanistan maintained support with Egyptian Packers active. UK reduced participation and were more selective with Russia barely operating. Sudan were absent with South Sudan showing interest. Local Packers were less active while Somalia showed good enquiry at the lower end of the market.

OFFERINGS

Leaf Grades - 85,040 packages (5,601,024.00 kilos) - 25.59% unsold.

Dust Grades - 57,241 packages (4,289,049.00 kilos) - 25.09% unsold.

Secondary Grades - 15,980 packages (821,481.00 kilos) - 11.64% unsold.

LEAF GRADES (M2 & M3)

BP1:

Best - Mostly easier by up to USC34.

Brighter - Irregularly discounted by USC26 with some lines easing by up to USC50.

Mediums - KTDA mediums were steady to USC8 above previous levels to mostly easier by up to USC12 while Plantation mediums met improved enquiry irregularly advancing by up to USC22.

Lower Medium - Lost up to USC22 but few select lines were USC10 above previous rates.

Plainer - Steady to USC5 dearer to easier by up to USC10.

PF1:

Best - More irregular interest varying between firm to USC16 dearer for some teas while others shed by up to USC17.

Brighter - Steady to USC7 above previous levels to easier by a similar margin.

Mediums - KTDA mediums saw irregular support and varied between firm to mostly dearer by up to USC11 to easier by USC9; plantation mediums mostly eased by up to USC14 while some select invoices met improved interest at USC19 above previous levels.

Lower Medium - Mostly easier by up to USC29 with very few lines gaining up to USC23.

Plainer - Shed by up to USC11.

CTC QUOTATIONS	BP1 - USC	PF1 - USC
Best	265 - 500	297 - 372
Good	245 - 302	220 - 324
Good Medium	250 - 274	280 - 303
Medium (KTDA)	160 - 214	210 - 265
Medium (Plantations)	170 - 218	180 - 217
Lower Medium	140 - 188	135 - 219
Plainer	084 - 135	084 - 142

DUST GRADES (M1)

PDUST:

Best - More irregular interest ranging between firm to USC16 dearer with some teas discounted by up to USC22.

Brighter - Were steady to USC10 dearer to easier by up to USC7.

Mediums - KTDA mediums held value to USC16 dearer but some lines lost up to USC8 with plantation mediums mostly easier by up to USC13 however select invoices were steady to USC3 above previous levels.

Lower Medium - Easier by up to USC10.

Plainer - Were discounted by up to USC8.

DUST1:

Best - Shed by up to USC19.

Brighter - Mostly easier by up to USC13 but a few lines held steady to USC4 above previous levels.

Mediums - KTDA mediums were up to USC8 dearer for select teas to mostly easier by up to USC9 with plantation mediums firm to USC2 dearer to easier by a similar margin.

Lower Medium - With less volumes offered, were easier by up to USC7.

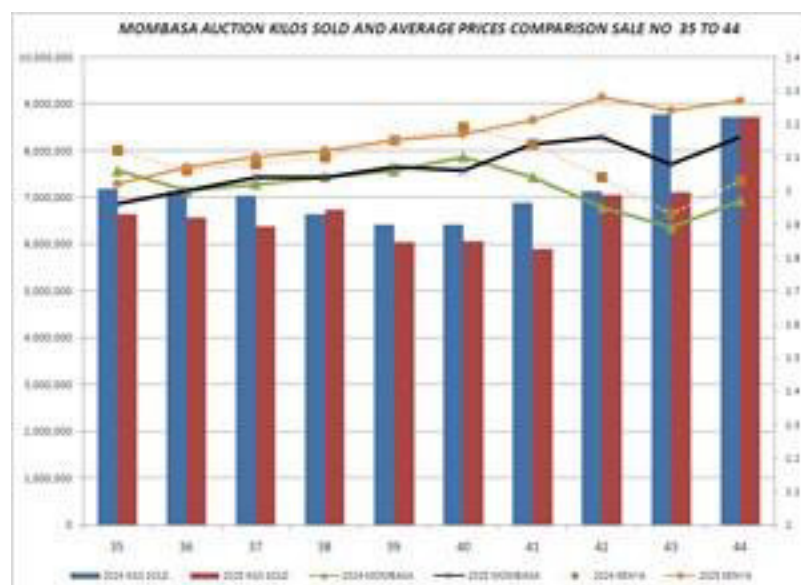
Plainer - Steady to USC8 above last rates to easier by a similar margin.

CTC QUOTATIONS	PDUST - USC	DUST1 - USC
Best	281 - 342	268 - 354
Good	270 - 316	270 - 316
Good Medium	225 - 298	260 - 293
Medium (KTDA)	170 - 246	175 - 262
Medium (Plantations)	160 - 195	150 - 162
Lower Medium	125 - 160	120 - 138
Plainer	075 - 127	084 - 114

SECONDARY GRADES (S1)

In the Secondary Catalogues, BPs eased while PFs held value. Clean well sorted coloury Fannings were firm with similar DUSTs steady. Other Fannings were irregularly firm with some lines dearer while DUSTs sold above last levels. BMFs were readily absorbed at steady rates.

SECONDARY QUOTATIONS (USC)	BP / BP2	PF / PF2	FNGSI / FNGS	DUST / DUST2	BMF
Best / Good	219 - 312	-	150 - 228	130 - 237	-
Good Medium / Medium	-	-	122 - 202	114 - 177	-
Lower Medium	140 - 202	119 - 158	110 - 151	090 - 144	108 - 114
Plainer	090 - 144	084 - 116	083 - 109	080 - 112	084 - 093



Courtesy - Africa Tea Brokers Limited.

BANGLADESH AUCTION

10TH NOVEMBER 2025 (SALE NO.27)

CTC LEAF: 50,246 packages of tea on offer met with a good demand.

BROKEN: Large Broken were a fairly good market but were a little easier whilst bright liquoring smaller types met with a fairly strong demand and were about steady. Medium varieties met with less enquiry and were a little easier. Plainer types were less in demand and withdrawals were more. BLF teas were a good market particularly the better invoices which tended dearer but there were quite a few withdrawals.

FANNINGS: Well made good liquoring Fannings were a strong market and sold at around last levels. Medium types met with a fairly good demand and sold at firm to slightly easier rates. Plainer teas met with less demand with quite a fair withdrawals. BLF teas were a good market particularly the better invoices which tended dearer but there were quite a few withdrawals.

DUST: 10,158 packages of tea on offer again met with a strong demand. Good liquoring Dusts sold well and were firm on last. Their Mediums met with a strong interest and were dearer following quality. Plain/BLF Dusts were of good market and sold around last levels with hardly any withdrawals. Blenders lent good support with fair interest from the Loose tea buyers.

COMMENTS: Market witnessed a good demand following quite good competition for better varieties. Both Blenders and Loose tea buyers operated in good strength particularly for the well made good liquoring types. Once again the reprinted teas suffered heavy withdrawals. Dusts met with an improved demand.

Our Catalogue: (Sale 27) Avg : Tk 256.57, Sold 73.31% , (Sale 26) Avg : Tk 258.58, Sold 69.92%

QUOTATIONS	BROKEN	QUOTATIONS	FANNINGS
Best	2.11-2.18	Best	2.11-2.16
Good	2.08-2.10	Good	2.08-2.10
Medium	2.03-2.07	Medium	2.03-2.07
Plain	2.01-2.02	Plain	2.01-2.02
BLF	1.60-2.00	BLF	1.64-2.03

Courtesy - National Brokers Limited.

TEA MARKETS AROUND THE WORLD

COONOR AUCTION

07TH NOVEMBER 2025 (SALE NO.45)

CTC LEAF

DEMAND: - Continued Good Demand.

MARKET: - The total CTC leaf teas sold this week was 67.00% (1088G87.78kgs) of the total offering of 1122717.11Kgs. Best category sold at erratic prices with select few invoices fetching dearer prices with competition, good category teas sold dearer selectively, whilst the smaller broken in this segment settled at barely steady price levels. Better medium teas sold dearer in the range of Rs 3 to 6. Medium category fetched Rs 6 to 7. Plainer sorts gained largely on all sort in the price range of Rs 4 to 6 or more.

BUYING PATTERN: Major blenders continued to be the mainstay and absorbed 56.68% of the total CTC leaf sold. Regional packers, local C up-country buyers continued to operate on the best and good category teas. CIS, Russia and the middle east buyers were continued to be active on lower medium and plainer teas.

ORTHODOX LEAF

DEMAND: - Good demand.

MARKET: - Whole leaf grades both in the high C medium grown sold firm to dearer following quality, whilst the broken grades in both the categories sold at irregularly around last levels. Fanning too settled at irregularly around last levels.

BUYING PATTERN: - CIS continued to be active on black, cleaner varieties. Middle East continued operate on the whole leaf grades and secondary broken. Upcountry buyers selective on the whole leaf.

CTC DUST

DEMAND: - Continued improved demand.

MARKET: - CTC dust offer this week was at 3GG602.15Kgs of which 346784.4Gkgs were sold (86.78%). Best, good C better medium category teas continue to sell at irregular C dearer levels in line with quality and competition. Medium C plainer sold firm to dearer by up to Rs 2 to 3 or more.

BUYING PATTERN: - Major blenders were fairly active. Regional packers and the up- country buyers improved their buying on good and better medium teas. Exporters were selective on the medium C plainer teas.

ORTHODOX DUST

DEMAND: - Reduced demand.

MARKET: - High grown primary sold irregular and easier with some out lots due to want of bids. Secondaries were barely steady to easier. The other primary and secondary teas sold irregularly easier and faced heavy withdrawals.

BUYING PATTERN: - Internal C regional packers were selective. Exporters were fairly active on the secondary dust.

Courtesy -J.Thomas & Co. Pvt. Ltd

TEA MARKETS AROUND THE WORLD

KOLKATA AUCTION

11TH NOVEMBER 2025 (SALE NO.46)

	2025	2024	DIFFERENCE
CTC	1,16,398	1,12,958	3,440
ORTHODOX	77,047	61,476	15,571
DUST	48,448	42,894	5,554

KOLKATA SALE ORTHODOX MARKET

MARKET REPORT:

Market opened to good demand. Well made Whole Leaf and Brokens maintaining quality selling around last levels. Remainder Whole Leaf and Brokens selling at irregularly lower rates following quality. Secondaries and Fannings selling around last levels.

BUYING PATTERN:

Middle East : Active

CIS: Good Support

HUL: Very Selective

KOLKATA SALE DUST MARKET

MARKET REPORT:

Market opened to good demand. Liquoring teas irregular and at times lower. Browner fibrous sorts easier.

BUYING PATTERN:

HTE: Active

Teloijan: Operating

AV Thomas: Operating

Western India: Operating

Courtesy -J Thomas & Company Private Limited

COCHIN AUCTION

12TH NOVEMBER 2025 (SALE NO.46)

QUANTITY	2025 kgs	2024 kgs	Difference
ORX LEAF	2,65,558	2,57,952	7,606
CTC LEAF	35,639	1,14,116	(78,477)
TOTAL	3,01,197	3,72,068	(70,871)

COCHIN LEAF

Market Report - Orthodox Teas Market Overview

The Orthodox market reflected a steady to firm undertone supported by consistent active participation from CIS and Middle East buyers for quality teas. Whole leaf grades attracted strong export competition, particularly from CIS buyers, maintaining firm to slightly dearer levels. Liquoring grades displayed steady demand, with improved makes commanding premiums. Medium descriptions were irregular while plainer teas faced selective interest and tended easier against last sold.

Withdrawals were mainly confined to lower-end teas where quality and market value did not align. Clearance remained satisfactory among better grades.

Market Report - CTC Teas Market Overview

The CTC market maintained a firm tone, with good liquoring teas continuing to command premiums. The overall sentiment remained positive, supported by steady competition across major buying sections.

Brighter liquoring grades met strong competition and realized firm to dearer levels compared to last sale. Medium teas maintained steady rates with improved lines well supported; plainer types were occasionally easier. Fannings continued to draw fair interest from local Packeteers and Exporters, generally maintaining steady prices.

Unsold quantities were confined to medium and plain grades where reserves were above trade expectations. Overall clearance remained satisfactory.

Courtesy - J.T. COCHIN

TEA MARKETS AROUND THE WORLD

SILIGURI AUCTION

12TH NOVEMBER 2025

	2025-2026	2024-2025	DIFFERENCE
CTC	169,657	149,190	20,467
DARJEELING	-	-	-
GREEN	-	-	-
DUST	14,388	13,709	679
TOTAL	184,045	162,899	21,146

CTC LEAF MARKET REPORT

STAC OFFERINGS IN PACKAGES (SALE NO 46)

DEMAND / MARKET DETAILS: Market opened to good demand. Limited quantity of garden teas seen so far, selling at irregular levels following quality. Medium and Plainer sorts are following a similar trend.

BUYING PATTERN:

Internal/ Local Packeteers: Mainstay

TCPL: Operating W.I/HUL : Good support

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

MALAWI AUCTION

12TH NOVEMBER 2025 (SALE NO.46)

Good demand continued this week at generally firm rates following quality for the 6200 packages on offer.

BP1 were firm on last.

PF1 sold at irregular rates.

PD were not supported.

D1 were firm to 1USC dearer.

PF1SC fetched 1-3USC easier where sold.

Secondaries were firm on last to 7USC easier.

Courtesy - TEA BROKERS CENTRAL AFRICA LIMITED

GUWAHATI AUCTION

04TH NOVEMBER 2025 (SALE NO.45)

Final Market Report

Market: CTC

There was good demand at around last levels following quality.

Buying Pattern: CTC.

There was fair enquiry from HUL, Western India, North India buyers. TCPL participated selectively on the plainer sorts. Other packeteers, exporters operated.

Market: DUST

There was good demand at around last levels.

Buying Pattern: DUST

There was good support from Western India, Pranjivan J Shah/ G Beria consultants. North India buyers operated.

Courtesy - ASSOCIATED BROKERS PVT. LTD.