



**ONE40**

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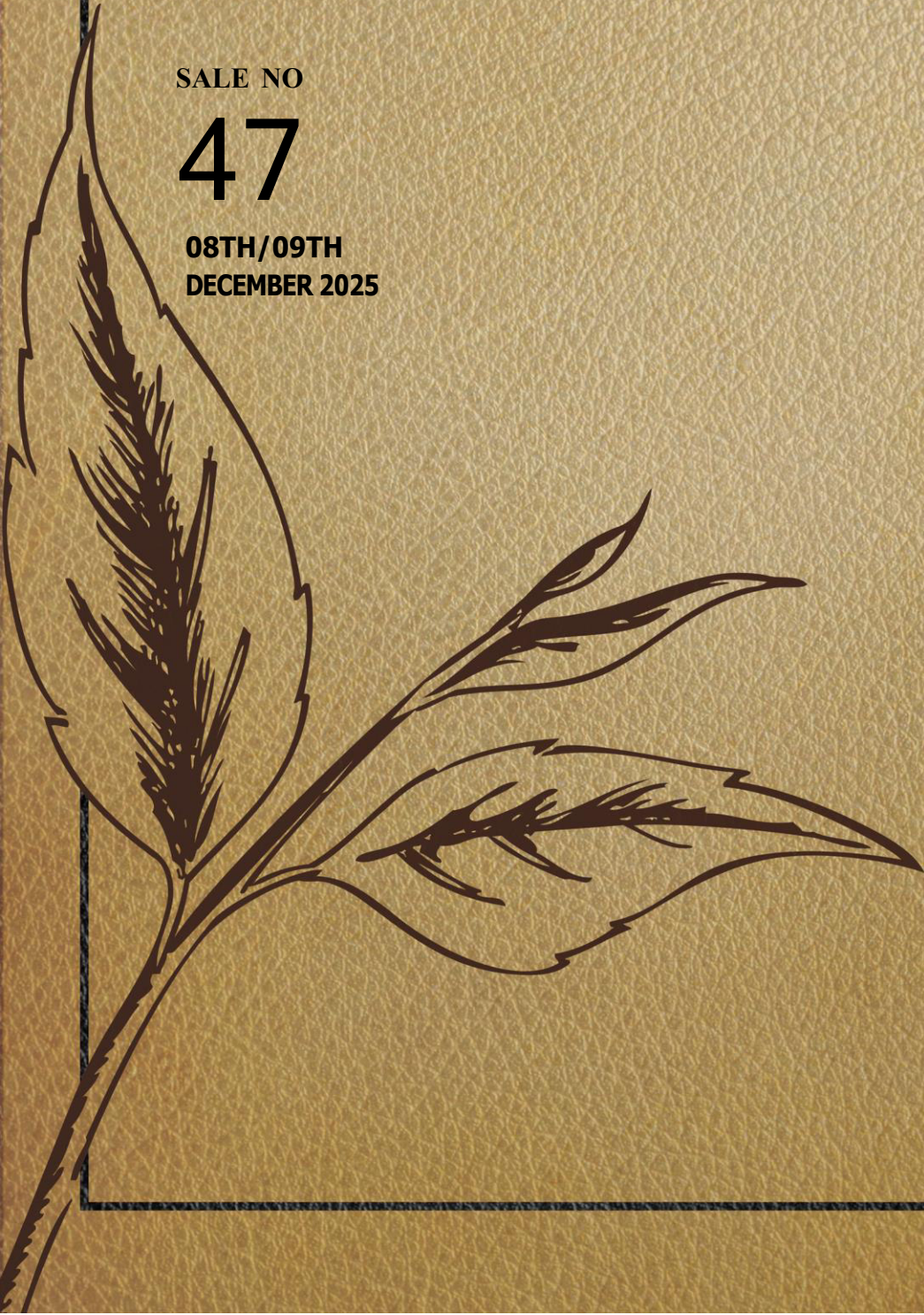
**FORBES & WALKER TEA BROKERS PVT LTD**

# **WEEKLY TEA MARKET REPORT**

**SALE NO**

**47**

**08TH/09TH  
DECEMBER 2025**





## Overall Market

	QTY (M/KGS)	DEMAND
Ex Estate	0.71	Good
High & Medium	0.62	Good
Leafy	0.76	Fair
Semi Leafy	0.63	Fair
Tippy/Small Leaf	0.84	Fair
Premium Flowery	0.04	Fair
Off Grade	1.22	Irregular
Dust	0.44	Firm to Dearer
<b>Total</b>	<b>5.26</b>	<b>Good general</b>

## ORDER OF SALE

SALE NO : 47

08TH/09TH DECEMBER 2025

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

## AUCTION DETAILS

**AT THIS WEEK'S SALE 10,785 LOTS TOTALLING 5,263,732 KGS WERE ON OFFER. THE BREAKDOWN IS AS FOLLOWS:**

	LOTS	QUANTITY
Ex Estate	751	713,458
High & Medium	1,440	616,923
Low Grown - Leafy	1,983	756,716
Low Grown - Semi Leafy	1,527	634,565
Low Grown - Tippy	1,840	842,603
Premium Flowery	312	41,806
Off Grades	2,411	1,221,160
Dust	521	436,501
<b>Total</b>	<b>10,785</b>	<b>5,263,732</b>
Re - Prints	853	411,876
Ex Estate	751	713,458

### SETTLEMENT DATES

12/12/2025 15/12/2025 16/12/2025

10% Payment

Buyers Prompt

Sellers Prompt

### Quality

Overall, fairly similar to last.

## COMMENTS

Cyclone Ditwah, which had a devastating affect on Sri Lanka, caused only limited disruptions to the tea industry which once again demonstrated its resilience with Sale No. 47 which was scheduled for 01/02 December being conducted on 08/09 December. The Auction witnessed a buoyant market all round emanating perhaps partially due to an absence of an auction last week.

In the Ex-Estate catalogue, better liquoring Western BOP/BOPF's often appreciated by Rs. 20-40 per kg, whilst tea at the lower end of the market gained by Rs. 20-40 per kg and more for the cleaner leaf teas. Often the appreciation in prices at the lower end of the market seemed greater, narrowing the parity between teas in the Below Best category and those at the lower end of the market. Nuwara Eliya BOP/BOPF's witnessed better demand and sold at firm to marginally dearer rates, whilst the Uva/Uda Pussellawas' too appreciated by Rs. 50 per kg and Rs. 20-40 per kg for BOP/BOPF's respectively.

High & Medium Grown CTC teas continued to sell at last levels, whilst the Low Grown and particularly the PF1 grade declined by an average Rs. 20 per kg.

Interest from shippers to the UK and the continent appeared subdued. There was fair activity from shippers to China, Japan, Middle East and the CIS, whilst shippers to South Africa appeared selective.

Low Grown totalled approximately 2.24 M/Kgs. All categories met with fair demand.

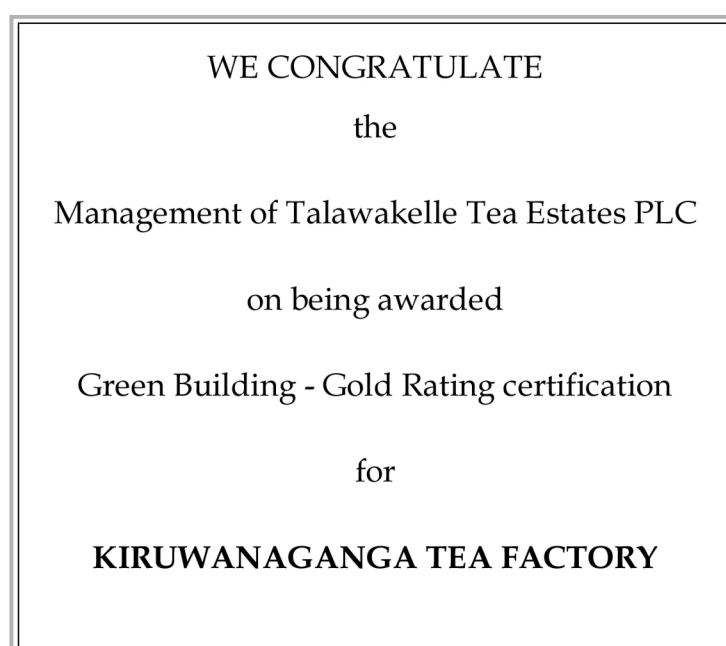
In the Leafy and Semi-Leafy catalogues, well-made BOP1's were firm, whilst the balance together with the OP1's were dearer. High-priced OPA's were irregular, whilst the balance together with the OP's appreciated. Select Best PEK's were dearer, whilst the balance sold around last levels. PEK1's too, in general, sold around last levels.

In the Tippy catalogue, FBOP/FF1's in general were dearer.

In the Premium catalogue, Very Tippy teas met with good demand and were dearer. Best and Below Best too appreciated, whilst the balance were irregular following quality.

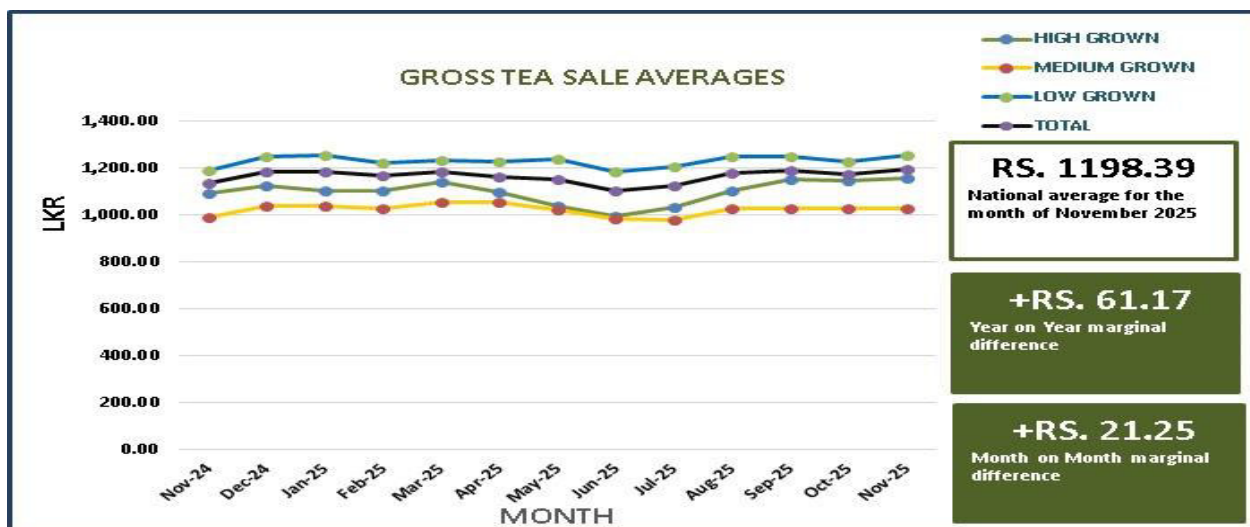
### NOTE

Next week's Auction (Sale No. 48) is scheduled for Monday, 15 December and Tuesday, 16 December 2025



# NATIONAL TEA SALES AVERAGES

## (NOVEMBER 2025)



### Key Highlights:

- Overall elevation average in November appreciated by Rs. 21.25 in comparison to the previous month.
- High and Low Grown elevations recorded positive variances both in LKR and USD terms in comparison with the previous month, whilst the Medium Grown elevation witnessed a marginal decline of Rs. 0.73 and USD terms 0.03
- All elevations gained in LKR terms and in USD terms the High and Low Grown elevations appreciated, whilst the Medium Grown elevation recorded a negative variance of USD 0.03 vis-à-vis November 2024
- All elevations recorded negative variances during the period January-November 2025 in comparison to the cumulative corresponding period of 2024 in both LKR and USD terms

In Sri Lankan Rupees								
	25-Nov	25-Oct	MOM Variance	24-Nov	YOY Variance	To date 2025	To date 2024	YOY Variance
High Grown	1,157.52	1,147.19	10.33	1,092.89	64.63	1,094.32	1,142.68	-48.36
Medium Grown	1,030.24	1,030.97	-0.73	990.25	39.99	1,023.94	1,066.85	-42.91
Low Grown	1,258.93	1,232.18	26.75	1,191.73	67.20	1,233.42	1,308.46	-75.04
Total	1,198.39	1,177.14	21.25	1,137.22	61.17	1,164.97	1,228.46	-63.49
In U.S. Dollars								
	25-Nov	25-Oct	MOM Variance	24-Nov	YOY Variance	To date 2025	To date 2024	YOY Variance
High Grown	3.78	3.77	0.01	3.74	0.04	3.65	3.77	-0.12
Medium Grown	3.36	3.39	-0.03	3.39	-0.03	3.41	3.52	-0.11
Low Grown	4.11	4.05	0.06	4.08	0.03	4.11	4.32	-0.21
Total	3.91	3.87	0.04	3.89	0.02	3.88	4.05	-0.17

Source - Sri Lanka Tea Board (For statistical purposes only)

National Tea Sale average for the month of November 2025 recorded Rs. 1,198.39 (USD 3.91), recording an increase of Rs. 21.25 and USD 0.04 in comparison with the previous month's average of Rs. 1,177.14 (USD 3.87).

\* In comparison to the November 2024 average of Rs. 1,137.22 (USD 3.89), shows an increase of Rs. 61.17 and USD 0.02 YOY.

\* Total National Sale Average for the year 2025 (to date) was recorded at Rs. 1,164.97 (USD 3.88), a decline of Rs. 63.49 (USD 0.17) against the corresponding year's average of Rs. 1,228.46 (USD 4.05).

### Elevation-Wise Analysis - November 2025:

\* High Grown average for the month recorded an increase of Rs. 10.33 and USD 0.01 month on month, whilst an increase of Rs. 64.63 and USD 0.04 was witnessed against the corresponding month in 2024.

\* Medium Grown average for the month recorded a negative variance of Rs. 0.73 and USD 0.03 month on month. In comparison to the corresponding monthly average last year, shows an increase of Rs. 39.99 and decrease of USD 0.03.

\* Low Grown average for the month recorded an increase of Rs. 26.75 and USD 0.06 month on month, whilst against corresponding average of November 2024 shows a positive variance of Rs. 67.20 and USD 0.03.

\* All elevations recorded negative variances during the period January-November 2025 in comparison to the cumulative corresponding period of 2024 in both LKR and USD terms.

(Refer statistical details on Page No. 13)

## World Tea News

### Kenya projects 553 MKG tea crop for 2025

Kenya's tea production declined by 4.5 per cent in August 2025 to 36.87 million kgs, down from 38.6 million kgs recorded during the same period in 2024.

The decline is attributed to prolonged dry and cold weather conditions, as well as reduced rainfall across major tea-growing regions.

Specialty tea output for the month stood at 1.187 million kgs, representing 3.2 per cent of total production, mainly dominated by orthodox teas from plantations and independent processors, with smaller quantities of green and purple tea produced by cottage factories.

Annual output is projected at 553 million kgs significantly lower than the 594 million kgs recorded in 2024 and the 570 million kgs achieved in 2023, owing to continued depressed rainfall expected in the final quarter of the year.

At the Mombasa auction, 22.86 million kgs of Kenyan tea were sold in August, a decrease from the 25.11 million kgs sold during the same month last year.

The weighted average monthly auction price was slightly lower at US\$2.14 per kg, compared to US\$2.20 last year, though marginally higher than the US\$2.05 recorded in July. Premium CTC leaf and Dust grades with superior brightness and appearance fetched better prices.

Tea exports fell from 55.57 million kgs in July to 52.23 million in August, shipped to 59 markets. Local consumption also dipped to 2.96 million kgs, down from 3.28 million kgs last year.

*Source: Business Recorder (Extracts), Courtesy: Tea Exporters' Association Sri Lanka*

### Kenyan works on GI recognition for Tea

Kenyan tea sector stakeholders are working on a feasibility study on Geographical Indications (GI), a tool intended to enhance the global branding and market value of Kenyan tea.

Adopting GI certification could offer several benefits to farmers and the larger tea industry. These include higher earnings through premium pricing for origin-designated tea, stronger global recognition of "Kenya Tea" alongside international counterparts such as Darjeeling and Ceylon, and the promotion of sustainable production.

The initiative could also strengthen collaboration among growers, factories, and marketers., whilst this strategy is expected to enhance product quality, protect reputation, and increase the overall value chain benefits for farmers across the country.

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

# CROP AND WEATHER

FOR THE PERIOD 26 November - 09 December 2025

## Western/Nuwara Eliya Regions



The Western and Nuwara Eliya regions reported heavy rain throughout the week. The Department of Meteorology expects bright mornings and heavy evening showers in both regions in the week ahead.

## Uva/Udapussellawa Regions



The Uva and Uda Pussellawa regions reported bright mornings and evening showers throughout the week. Misty conditions are expected in both regions in the week ahead according to the Department of Meteorology.

## Low Grown



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

## Crop

All regions reported a decrease in the crop intake.

## HIGH GROWN TEAS

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

### BOP

Best Western's, where quality was maintained, gained by Rs. 20-40 per kg, whilst the others sold around last week's levels. In the Below Best category, teas in the higher price bracket gained by Rs. 20 per kg, whilst the others together with the Plainer sorts appreciated by Rs. 20-40 per kg. Nuwara Eliya's were firm and dearer. Uda Pussellawa's gained by Rs. 50 per kg and more for the clean leaf teas. Uva's sold around last.

### BOPF

Best Western's - Select high-priced teas were easier, whilst a wider selection of the better teas appreciated by up to Rs. 50 per kg. In the Below Best category, teas in the higher price bracket appreciated by Rs. 20-40 per kg, whilst the others together with teas at the lower end of the market were firm and Rs. 20 per kg dearer. Nuwara Eliya's were firm and dearer. Uva/Uda Pussellawa's were firm and Rs. 20-40 per kg dearer.

### OP/OPA

Well-made varieties gained by Rs. 20-40 per kg. Below Best types were firm to dearer by Rs. 20 per kg, whilst the poorer sorts were irregularly dearer by Rs. 20-50 per kg.

### PEKOE/PEKOE1

Flavoury PEK/PEK1's were irregular, whilst the Orthodox Leafy Best PEK/PEK1's were dearer by Rs. 30-50 per kg. Below Best and the others were irregularly dearer by Rs. 20-40 per kg. A few Select Best Rotovane PEK's sold at last week's closing levels following special inquiry, whilst the Below Best varieties and poorer sorts gained by Rs. 20-40 per kg.

### FBOP/FBOPF1

Flavoury FBOP's held firm, whilst the FBOPF1's were dearer following quality. Better Orthodox FBOP/FBOPF1's gained by Rs. 50-80 per kg, whilst the others and teas at the lower end were irregularly dearer by Rs. 20-40 per kg.

QUOTATIONS LKR SALE DTE	BOP		BOPF		PEKOE/FBOP		OP	
	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec
Best Westerns	1240-1380	1280 - 1440	1340-1500	1340 - 1440	1300-1800	1320 - 1650	1180-1260	1220 - 1380
Below Best Westerns	1160-1220	1200 - 1260	1260-1320	1280 - 1320	1080-1280	1180 - 1300	1060-1160	1000 - 1080
Plainer Westerns	1120-1140	1160 - 1180	1020-1240	1140 - 1260	940-980	860 - 1120	960-980	830 -
Nuwara Eliyas	N/A	1380 -	N/A	1260 -	1000	900 - 1280	740-920	900 -
Brighter UdaPussellawas	1140-1160	1200 - 1240	1180-1250	1260 - 1280	1260-1460	1280 - 1650	1080-1200	1160 - 1300
Other UdaPussellawas	1080-1120	1160 - 1180	1080-1120	1200 - 1240	810-1200	N/A	740-1040	900 - 1000
Best Uvas	1260-1280	1220 - 1340	1240-1260	1260 - 1360	1260-1650	1300 - 1800	1080-1160	1120 - 1320
Other Uvas	1180-1240	1200 -	1200-1220	1240 -	790-1240	810 - 1280	820-1060	870 - 1100

## MEDIUM GROWN TEAS

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

<b>BOP</b>	Large Leaf teas were irregular though continued to sell reasonably well, whilst the others gained by Rs. 20-40 per kg.
<b>BOPF</b>	Better sorts were firm and Rs. 20 per kg dearer, whilst the others were generally firm.
<b>OP/OPA</b>	Well-made teas gained by Rs. 20-40 per kg, whilst the Below Best types were irregularly dearer. Teas at the lower end were dearer by Rs. 20-50 per kg.
<b>PEKOE/PEKOE1</b>	Select Best and Best PEK/PEK1's were firm to dearer by Rs. 50 per kg, whilst the Below Best and other PEK/PEK1's gained by Rs. 20-40 per kg.
<b>FBOP/FBOPF1</b>	Select Best FBOP's were firm on last levels, whilst the FBOPF1's gained by Rs. 20-40 per kg. Best and Below Best FBOP/FF1's were dearer by Rs. 30-50 per kg, whilst the FBOP's at the bottom end were lower by Rs. 20-40 per kg. FF1's gained by a similar margin.

QUOTATIONS LKR SALE DTE	BOP		BOPF		PEKOE/FBOP		OP	
	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec
Good Mediums	1440-2000	1440 - 2050	1240-1300	1280 - 1320	1340-1850	1460 - 2000	1100-1380	1140 - 1380
Other Mediums	830-1180	880 - 1240	900-1140	920 - 1200	810-1320	840 - 1440	680-1080	740 - 1120

## UNORTHODOX / CTC TEAS

<b>HIGH GROWN</b>	BP1s - Hardly any offerings. PF1s -Firm.
<b>MEDIUM GROWN</b>	BP1s - Irregular. PF1s - Mostly sold around last.
<b>LOW GROWN</b>	BP1s - Hardly any offerings. PF1s - Declined by Rs. 20-40 per kg.

QUOTATIONS LKR SALE DTE	BP1		PF1	
	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec
High Grown	N/A	N/A	1100-1180	1100 - 1160
Medium Grown	1200	1080 - 1120	1020-1160	1020 - 1220
Low Grown	1220	1460 -	1220-1460	1240 - 1440



## OFF GRADES

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

### FGS1/FGS

Select Best sorts were firm to dealer by Rs. 20 per kg, whilst the Best varieties together with the Below Best sort gained by Rs. 20-40 per kg following quality. Teas at the lower end of the market maintained around last week's levels. Low Grown - In general were firm to dealer by Rs. 10-30 per kg. CTC - In general were firm to dealer by Rs. 20 per kg.

### BROKENS

Reducer varieties in the Best category maintained. Clean leaf varieties together with the cleaner Below Best sorts were firm to dealer by Rs. 20 per kg, whilst the poorer sorts declined.

### BOP1A

Main Grade reducer varieties in the Best category maintained. Below Best varieties were firm, whilst the poorer sorts were selectively easier by Rs. 20-30 per kg.

### QUOTATIONS LKR

SALE DTE	HIGH		MEDIUM		LOW	
	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec
Better Fannings (Orthodox)	830-1300	840 - 1280	830-1160	820 - 1240	830-1020	840 - 980
Better Fannings (CTC)	N/A	780 - 850	810-850	810 -	860-1120	860 -- 1140
Other Fannings (Orthodox)	650-820	630 - 830	590-820	560 - 810	540-820	540 -- 830
Other Fannings (CTC)	N/A	N/A	600-760	610 - 770	620-750	600 - 730
Good Brokens	760-980	770 - 1160	780-1200	780 - 1200	790-1420	790 -- 1280
Other Brokens	600-750	660 - 760	530-770	530 - 770	490-780	480 -- 780
Better BOP1As	810-900	810 - 940	780-1020	780 - 1260	820-1600	820 -- 1600
Other BOP1As	750-800	700 - 800	710-760	660 - 760	650-800	620 - 800

## DUSTS

### DUST1

Select Best teas were firm to dealer by Rs. 50 per kg. Teas in the Best category, where quality was maintained, were firm to dealer by Rs. 20-30 per kg, whilst the others declined by Rs. 40 per kg. Teas in the Below Best category together with the poorer sorts were dearer by Rs. 40 per kg. Low Grown remained firm. High and Medium Grown CTC's were dearer by Rs. 40 per kg, whilst the Low Grown CTC's followed a similar trend.

### DUST

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

### QUOTATIONS LKR

SALE DTE	HIGH		MEDIUM		LOW	
	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec
Better Primary Dust (Orthodox)	1200-1650	1240 - 1750	1080-1240	1120 - 1300	900	940 - 1020
Better Primary Dust (CTC) P. Dust	1120-1160	1180 - 1260	1120-1200	1150 - 1220	1180-1440	1200 - 1420
Below Best Primary Dust (Orthodox)	1120-1200	1180 - 1220	850-1060	820 - 1100	810-890	800 - 920
Other Primary Dust (CTC) P. Dust	1100-1120	N/A	850-1100	890 - 1140	800-1160	840 - 1180
Other Primary Dust (Orthodox)	900-1100	1100 - 1160	680-840	630 - 800	600-800	560 - 780
Better Secondary Dust	1060-1220	1080 - 1240	920-1000	980 - 1120	950-1200	960 - 1160
Other Secondary Dust	720-1040	770 - 1060	520-900	540 - 960	600-940	580 - 940

## LOW GROWN TEAS

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

<b>FBOP/FBOP1</b>	Well-made FBOP's were firm to dearer, whilst the others in general sold at last levels. FBOP1's, in general, were firm.
<b>BOP</b>	In general were firm.
<b>BOP1</b>	Select Best and Best BOP1's were firm, whilst the balance together with the clean bolder varieties were firm to dearer.
<b>OP1</b>	OP1's, in general, were dearer.
<b>OP</b>	OP's, in general, appreciated.
<b>OPA</b>	High-priced OPA's were irregular, whilst the balance were firm to dearer.
<b>PEKOE</b>	Select Best PEK's appreciated, whilst the Best, Below Best together with teas at the bottom were firm. PEK1's, in general, were firm.
<b>BOPF</b>	In general were firm.
<b>FBOPF/FBOPF1</b>	Very Tippy teas met with good demand and were dearer. Best and Below Best too appreciated, whilst the balance were irregular following quality. FF1's, in general, were dearer.

QUOTATIONS LKR SALE DTE	SELECT BEST		BEST		BELOW BEST		OTHERS	
	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec	25/26 Nov	08/09 Dec
FBOP 1	1800-2000	1800 - 2000	1450-1500	1450 - 1500	1250-1300	1250 - 1300	950-1000	950 - 1000
FBOP	1900-2600	1900 - 2600	1500-1550	1550 - 1600	1250-1300	1300 - 1350	900-950	950 - 1000
BOP 1	2350-2900	2350 - 3000	1750-2250	1750 - 2250	1300-1550	1320 - 1550	900-1200	900 - 1240
BOP	1900-2200	1950 - 2300	1500-1550	1500 - 1550	1200-1250	1250 - 1300	900-1000	900 - 1000
BOPF	1400-1600	1450 - 1700	900-1000	950 - 1000	850-900	850 - 900	800-850	800 - 850
FBOPF (TIPPY)/FBOPF SP	5200-6200	5200 - 6200	3500-4400	3500 - 4400	2700-3000	2700 - 3000	1000-1100	1000 - 1100
FBOPF 1	1600-1750	1650 - 1800	1450-1500	1500 - 1550	1250-1300	1300 - 1350	950-1000	1000 - 1100
FBOPF	1650-1900	1700 - 2000	1400-1500	1450 - 1550	1200-1250	1250 - 1300	900-950	900 - 950
OP 1	2850-3400	2850 - 3600	2550-2800	2550 - 2800	1550-2500	1600 - 2500	900-1460	900 - 1500
OP	1500-1700	1500 - 1850	1400-1460	1420 - 1480	1280-1380	1280 - 1400	900-1260	900 - 1260
OPA	1480-1900	1480 - 1700	1340-1460	1340 - 1460	1240-1320	1240 - 1320	900-1220	900 - 1220
PEKOE	1440-2450	1480 - 2700	1340-1420	1360 - 1480	1240-1320	1260 - 1340	850-1220	850 - 1240
PEK 1	1850-2600	1850 - 2400	1550-1800	1600 - 1800	1300-1500	1300 - 1500	900-1280	900 - 1280

TOP PRICE

WESTERN MEDIUM				WESTERN HIGH			
Hatale	BOP		2050	Inverness	FBOP/FBOPF1		1500
Ancoombra	BOPSp		1550	Venture	OP/OPA		1380
Doombagastalawa	BOPSp	@	1200	Kirkoswald	OP/OPA	@	1300
Vellai Oya	BOPF/BOPFSp		1320	Venture	OP1		1420
Craighead	BOPF/BOPFSp	@	1200	Torrington	PEK/PEK1	@	1850
Widsorforest	BOPF/BOPFSp	@	1140	NUWARA ELIYAS			
Dartry Valley	BOP1	@	2200	Mahagastotte	BOP	@	1380
Craighead	FBOP/FBOP1	@	1950	Kenmare	BOPSp	@	980
Harangalla	FBOP/FBOP1	@	1850	Mahagastotte	BOPF/BOPFSp	@	1260
Craighead	FBOPF/FBOPF1	@	1650	Kenmare	BOPF/BOPFSp	@	790
Doombagastalawa	FBOPF/FBOPF1	@	1650	Kenmare	FBOP/FBOP1		1080
Harangalla	FBOPF/FBOPF1	@	1650	Court Lodge	OP/OPA		900
Dartry Valley	FBOPF/FBOPF1	@	1650	Court Lodge	PEK/PEK1		1280
Ancoombra	FBOPF/FBOPF1		1650	UDAPUSSELLAWAS			
Hatale	FBOPF/FBOPF1		1650	Kirklees	BOP		1240
Windsorforest	FBOPF/FBOPF1	@	1500	Luckyland	BOPSp		1200
Imboolpitiya	FBOPF/FBOPF1	@	1500	Kirklees	BOPSp		1200
Pupuressa	FBOPF/FBOPF1		1500	Luckyland	BOPF/BOPFSp		1300
New Rothschild	FBOPF/FBOPF1		1500	Blairlomond	BOP1	@	1460
Cooroondoowatte	FBOPF/FBOPF1	@	1480	Delmar	FBOP/FBOP1	@	1650
Hansagiri Kothmale	FBOPF/FBOPF1		1480	Blairlomond	FBOP/FBOP1	@	1650
Orange Field	FBOPF/FBOPF1		1480	Delmar	FBOPF/FBOPF1		1550
Meezan	OP/OPA		1320	Maha Uva	FBOPF/FBOPF1	@	1500
Hatale	OP/OPA		1320	Delmar	OP/OPA	@	1300
Galgewatta	OP/OPA		1320	Blairlomond	OP/OPA	@	1140
Harangalla	OP/OPA	@	1300	Delmar	OP1	@	1440
Dartry Valley	OP/OPA	@	1280	Blairlomond	PEK/PEK1	@	1950
Midfield	OP/OPA		1280	Maha Uva	PEK/PEK1	@	1900
Hatale	OP1		1600	LOW GROWNS			
Harangalla	OP1	@	1500	Green Lanka	BOP		2600
Dartry Valley	OP1	@	1500	Elaine Super	BOPSp		2550
Craighead	PEK/PEK1	@	2000	New Spring View	BOPSp		2350
Inguruwatte Super	PEK/PEK1		2000	Kamarangapitiya	BOPSp	@	2250
New Rothschild	PEK/PEK1		2000	Parakaduwa Super	BOPF		1950
Dartry Valley	PEK/PEK1	@	1950	Uruwala	BOPF	@	1850
Meezan	PEK/PEK1		1950	H P P Tea	BOPFSp		2400
Galgewatta	PEK/PEK1		1950	Sithaka	FBOP		2950
WESTERN HIGH				Kiruwana <span>g</span> anga	FBOP1	@	2100
Wattegodde	BOP	@	1440	Hedigalla	FBOPF		2000
Ingestre	BOP	@	1420	Danawala	FBOPF		1950
Bearwell	BOP	@	1400	Ganganee	FBOPF		1950
Holyrood	BOP	@	1400	Kosgahdola Ella	FBOPF	@	1850
Somerset	BOP	@	1400	Rajjuruwatta Super	FBOPF1		2000
Ingestre	BOPSp		1480	Pothotuwa	FBOPF1	@	1800
Somerset	BOPSp	@	1440	Lumbini	FBOPF1		1800
Wattegodde	BOPSp	@	1420	Gunawardana	BOP1	@	3000
Holyrood	BOPSp		1420	Pothotuwa	BOP1	@	2700
Robgill	BOPF/BOPFSp		1440	Gunawardana	OP1	@	3600
Gouravilla	BOPF/BOPFSp	@	1420	New Vithanakande	OP1		3600
Bambarakelly	BOP1		1220	Pothotuwa	OP1	@	3450
Queensberry	FBOP/FBOP1	@	1650	Miriswatta	OP		1850
Venture	FBOP/FBOP1		1650	Lions	OPA		1700
Torrington	FBOP/FBOP1	@	1500	Liyonta	OPA		1700
Queensberry	FBOPF/FBOPF1	@	1500	Miriswatta	OPA		1700
				Liyonta	PEK		2700
				Lions	PEK1		2400

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



UVA MEDIUM			
Demodera 'S'	BOP		1650
Halpewatta Uva	BOPSp		1600
Dickwella	BOPF/BOPFSp	@	1650
Sarnia Plaiderie	BOPF/BOPFSp	@	1500
Aruna Passara	BOP1		2000
Telbedde	BOP1	@	1700
Sarnia Plaiderie	FBOP/FBOP1	@	1800
Shawlands	FBOP/FBOP1	@	1800
Dickwella	FBOP/FBOP1		1800
Telbedde	FBOP/FBOP1	@	1750
Demodera 'S'	FBOP/FBOP1		1750
Sarnia Plaiderie	FBOP/FBOP1	@	1700
Halpewatta Uva	FBOP/FBOP1		1700
Sarnia Plaiderie	FBOPF/FBOPF1	@	1550
Telbedde	FBOPF/FBOPF1		1550
Roseland Uva	FBOPF/FBOPF1		1550
Sarnia Plaiderie	OP/OPA		1440
Wewesse	OP1		1750
Dickwella	PEK/PEK1	@	2050
Misty-Uva	PEK/PEK1	@	1950
Aruna Passara	PEK/PEK1		1950
Aruna Keppetipola	PEK/PEK1		1950
Halpewatta Uva	PEK/PEK1	@	1850
Demodera 'S'	PEK/PEK1	@	1850
Telbedde	PEK/PEK1		1850
UVA HIGH			
Bandaraeliya	BOP	@	1340
Kelliebedde	BOP	@	1240
Aislaby	BOPSP		1650
Nayabedde	BOPF/BOPFSp	@	1280
Bandaraeliya	BOPF/BOPFSp	@	1280
Pitaratmalie	BOPF/BOPFSp		1280
Kelliebedde	BOPF/BOPFSp	@	1260
Aislaby	BOP1	@	1700
Ranaya	BOP1		1700
Uva Highlands	BOP1	@	1480
Mount Uva	FBOP/FBOP1		1800
Aislaby	FBOP/FBOP1	@	1750
Gonamotawa	FBOP/FBOP1	@	1700
Ellathota Uva	FBOP/FBOP1	@	1700
Uva Highlands	FBOP/FBOP1	@	1700
Ranaya	FBOP/FBOP1		1700

UVA HIGH			
Needwood Super	FBOPF/FBOPF1		1600
Mount Uva	FBOPF/FBOPF1		1600
Gonamotawa	FBOPF/FBOPF1	@	1550
Aislaby	FBOPF/FBOPF1	@	1550
Glenanore	FBOPF/FBOPF1	@	1500
Ellathota Uva	FBOPF/FBOPF1	@	1500
Uvakellie	FBOPF/FBOPF1		1500
Oodoowerre	FBOPF/FBOPF1		1500
Ranaya	FBOPF/FBOPF1		1500
Aislaby	OP/OPA		1320
Ellathota Uva	OP/OPA	@	1300
Ellathota Uva	OP1	@	1550
Aislaby	OP1		1550
Aislaby	PEK/PEK1	@	1900
Battawatte	PEK/PEK1		1900
UNORTHODOX HIGH			
Dunsinane CTC	PF1	@	1160
UNORTHODOX MEDIUM			
Carolina CTC	PF1		1220
Delta CTC	BP1		1120
UNORTHODOX LOW			
Hingalgoda CTC	PF1		1440
Ceciliyan CTC	BP1		1460
PREMIUM FLOWERY			
Rasa	FBOPFSp		6250
Brombil	FBOPFExSp		5000
KDU Super	FBOPFExSp1		4800
DUSTS			
Mattakelle	DUST1		1750
Ceciliyan CTC	PD	@	1420
OFF GRADES			
Holyrood	FGS/FGS1	@	1280
Wattegodde	FGS/FGS1	@	1260
Eildon Hall	FGS/FGS1	@	1260
Adisham	FGS/FGS1		1260
Campion	FGS/FGS1		1260
Wanarajah	FGS/FGS1		1260
Chandrika CTC	PF		1140
Gunawardana	BM	@	1280
Avissawella	BM		1120
Kamarangapitiya	BM	@	1110
Morawakkorale	BM		1100
Falcon Lanka	BM		1100
Laksakanda	BP		1260
Aldora	BOP1A	@	1600
Chandrika Estate	BOP1A	@	1500

## QUANTITY SOLD

DURING THE PERIOD 20TH-26TH NOVEMBER 2025	WEEKLY (KGS)		TODATE (KGS)	
	2025	2024	2025	2024
PRIVATE SALES	303,380	215,272	9,858,706	5,990,642
PUBLIC AUCTION	4,868,461	4,970,232	224,754,260	220,392,490
FORWARD CONTRACTS	46,410	73,300	2,219,339	2,321,156
DIRECT SALES	NIL	NIL	NIL	NIL
<b>TOTAL</b>	<b>5,218,251</b>	<b>5,258,804</b>	<b>236,832,305</b>	<b>228,704,288</b>
BMF EXCLUDED FROM PRIVATE SALE	43,330	42,120	1,781,635	1,996,824

## (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
19TH NOVEMBER 2025	4.32	4.51	4.74	1223.70	1141.00	1107.06	4.03	3.96	3.44
26TH NOVEMBER 2025	4.87	4.97	4.63	1233.85	1161.82	1120.63	4.06	4.05	3.47

Source: Central Bank of Sri Lanka / Buying Rates

## RATES OF EXCHANGE

SRI LANKA RUPEE APPROX PER UNIT OF CURRENCY

YEAR	2025	2024	2023
USD	304.80	286.66	324.15
STG.PD	405.24	357.94	410.81
EURO	353.85	298.48	355.16
YEN	1.95	1.85	2.19

Source: Central Bank of Sri Lanka / Buying Rates

## PUBLIC AUCTION/GROSS SALES AVERAGE

SALE NO 46 25TH/26TH NOVEMBER 2025	WEEKLY(LKR)			TODATE (LKR)			WEEKLY(USD)			TODATE(USD)		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
Uva High Grown	1092.93	1020.09	960.71	1044.43	1099.97	980.15	3.59	3.56	2.97	3.50	3.65	3.00
Western High Grown	1211.17	1131.92	1058.48	1123.05	1186.02	1116.73	3.98	3.95	3.28	3.77	3.94	3.42
CTC High Grown	1144.80	1068.31	999.61	1087.42	1091.14	998.65	3.77	3.73	3.09	3.65	3.62	3.06
High Grown (Summary)	1174.97	1102.11	1026.44	1097.83	1158.31	1073.66	3.86	3.85	3.18	3.68	3.84	3.29
Uva Medium Grown	1116.91	1054.53	1012.85	1069.67	1124.52	1024.92	3.67	3.68	3.14	3.59	3.73	3.14
Western Medium Grown	1022.30	967.94	966.21	1007.22	1050.41	988.75	3.36	3.38	2.99	3.38	3.49	3.03
CTC Medium Grown	978.95	897.55	883.83	946.63	965.96	914.60	3.22	3.13	2.74	3.17	3.21	2.80
Medium Grown (Summary)	1049.13	992.63	980.44	1026.75	1074.92	1000.13	3.45	3.46	3.03	3.44	3.57	3.06
Orthodox Low Grown	1313.81	1241.23	1202.28	1266.66	1350.80	1277.03	4.32	4.33	3.72	4.25	4.48	3.91
CTC Low Grown	983.74	858.19	992.80	979.70	986.75	974.16	3.24	2.99	3.07	3.28	3.27	2.98
Low Grown(Summary)	1296.02	1219.53	1188.70	1250.06	1328.10	1259.78	4.26	4.26	3.68	4.19	4.41	3.86
<b>Total</b>	<b>1233.85</b>	<b>1161.82</b>	<b>1120.63</b>	<b>1181.20</b>	<b>1249.75</b>	<b>1176.86</b>	<b>4.06</b>	<b>4.05</b>	<b>3.47</b>	<b>3.96</b>	<b>4.15</b>	<b>3.60</b>

Source: Oanda Exchange Rates

Source: MSL - Averages

## NATIONAL TEA SALE AVERAGES MONTH OF NOVEMBER 2025

	MONTH(LKR)			TODATE (LKR)			MONTH(USD)			TODATE(USD)		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
Uva High Grown	1081.99	1025.00	956.98	1053.16	1101.77	990.72	3.53	3.51	2.92	3.51	3.64	3.02
Western High Grown	1208.33	1147.84	1042.78	1133.31	1191.04	1124.18	3.94	3.93	3.18	3.78	3.93	3.43
CTC High Grown	1142.01	1052.33	985.42	1088.73	1091.68	1000.18	3.73	3.60	3.00	3.63	3.60	3.05
High Grown (Summary)	1157.52	1092.89	1004.88	1094.32	1142.68	1072.51	3.78	3.74	3.06	3.65	3.77	3.27
Uva Medium Grown	1076.46	1022.90	997.83	1070.83	1119.24	1022.10	3.51	3.50	3.04	3.57	3.69	3.12
Western Medium Grown	1004.85	973.76	974.05	1011.43	1051.40	988.51	3.28	3.33	2.97	3.37	3.47	3.02
CTC Medium Grown	965.73	932.41	891.37	945.60	962.68	910.12	3.15	3.19	2.72	3.15	3.18	2.78
Medium Grown (Summary)	1030.24	990.25	983.98	1023.94	1066.85	1011.96	3.36	3.39	3.00	3.41	3.52	3.09
Orthodox Low Grown	1296.42	1233.91	1210.89	1269.42	1352.64	1279.53	4.23	4.23	3.69	4.23	4.46	3.91
CTC Low Grown	978.51	901.28	992.44	980.13	984.40	971.27	3.19	3.09	3.02	3.27	3.25	2.97
Low Grown(Summary)	1258.93	1191.73	1190.90	1233.42	1308.46	1250.64	4.11	4.08	3.63	4.11	4.32	3.82
<b>Total</b>	<b>1198.39</b>	<b>1137.22</b>	<b>1116.65</b>	<b>1164.97</b>	<b>1228.46</b>	<b>1170.40</b>	<b>3.91</b>	<b>3.89</b>	<b>3.40</b>	<b>3.88</b>	<b>4.05</b>	<b>3.57</b>

Source: Oanda Exchange Rates

Source: SLTB



## WORLD TEA PRODUCTION (M/KGS)

	2023	2024	2025	TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
<b>Oct</b>								
Sri Lanka	23	21.3	21.8	216.5	218.1	220.9	1.6	2.8
North India	169.2	181.5	142.1	981.3	935.9	936.9	-45.4	1
South India	19	24.2	19.9	197.2	188.7	194.5	-8.5	5.8

	2023	2024	2025	TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
<b>Sep</b>								
Bangladesh	14.3	12.2	11.4	68.9	61.8	60.9	-7.1	-0.9
Malawi	1.9	2.6	1.8	34.5	38.9	36.2	4.4	-2.7

	2023	2024	2025	TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
<b>Aug</b>								
Kenya	45.6	38.6	36.9	363.9	402.7	359.2	38.8	-43.5

## DETAILS OF AWAITING SALE

**SALE NO : 48**

**Scheduled for 15TH/16TH DECEMBER 2025**

	LOTS	QUANTITY
ExEstate	826	786,236
High & Medium	1,718	771,422
Leafy	2,094	808,831
Semi Leafy	1,722	724,589
Tippy	1,998	917,888
Premium Flowery	366	48,156
OffGrades	2,409	1,243,689
Dust	515	457,498
<b>Total</b>	<b>11,648</b>	<b>5,758,309</b>
RePrint	756	364,463

**22/12/2025**

**Buyers Prompt**

**23/12/2025**

**Sellers Prompt**

**This sale last year  
Sale No. 48 | 03RD/04TH OF DECEMBER 2024**

**Lots :10,214**  
**Re-print Lots :855**  
**Quantity :4,980,942 kgs**  
**Re-print Quantity :466,119 kgs**

### LOW GROWN CATALOGUES

Violations Excluded

**20/11/2025**

**LEAFY**

**Closed**

**SEMI-LEAFY**

**Closed**

**TIPPY**

**Closed**

### OTHER MAIN SALE CATALOGUES

**20/11/2025**

**HIGH &  
MEDIUM**

**Closed**

**PREMIUM  
FLOWERY**

**Closed**

**OFF  
GRADES**

**Closed**

**NO .OF PKGS**

**156,102**

**CTC**

**9,730 Pkgs - 519,780 kgs**

### ORDER OF SALE

**Approx Selling time of  
F&W Catalogues**

**15TH**

**DECEMBER 2025**

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

8.30am	Main Sale - High & Medium
11.30am	Semi - Leafy Teas
12.30pm	Low Grown - Leafy Teas
12.30pm	Low Grown - Tippy Teas
4.00pm	Off Grade

**16TH**

**DECEMBER 2025**

9.00am	BOP1A
9.30am	Premium Flowery
9.30am	Ex-Estate
11.30am	Dust

BC - BPML 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

DETAILS OF AWAITING SALE

SALE NO : 49  
Scheduled for 22ND/23RD DECEMBER 2025

	LOTS	QUANTITY
ExEstate	796	795,702
High & Medium	1,588	735,552
Leafy	2,216	857,656
Semi Leafy	1,584	656,569
Tippy	2,022	931,649
Premium Flowery	406	53,226
OffGrades	2,428	1,255,300
Dust	536	480,109
Total	11,576	5,765,763
RePrint	1,020	489,352

29/12/2025

Buyers Prompt

30/12/2025

Sellers Prompt

This sale last year  
Sale No. 49 | 10TH/11TH OF DECEMBER 2024

Lots	:12,154
Re-print Lots	:645
Quantity	:6,160,454 kgs
Re-print Quantity	:340,748 kgs

LOW GROWN CATALOGUES

Violations Excluded

28/11/2025

LEAFY  
Closed

SEMI-LEAFY  
Closed

TIPPY  
Closed

OTHER MAIN SALE CATALOGUES

28/11/2025

HIGH &  
MEDIUM  
Closed

PREMIUM  
FLOWERY  
Closed

OFF  
GRADES  
Closed

NO .OF PKGS  
154,554

CTC  
10,610 Pkgs - 564,365 kgs

CATALOGUE CLOSURE DETAILS

22/23

DECEMBER 2025

Sale No. 49

The Ex-Estate catalogue closed on 28th November 2025, excluding violations. The Main Sale catalogues too closed on 28th November 2025, excluding violations.

30

DECEMBER 2025

Sale No. 50

The Ex-Estate/High & Medium/Premium Flowery/Dust catalogues were closed on 08th December 2025, excluding violations. The Leafy/Semi-Leafy/ Tippy/BOP1A catalogues were closed on 06th December 2025, excluding violations. The Off Grades catalogue was closed on 05th December 2025, excluding violations.

06/07

JANUARY 2026

Sale No. 1

The Ex-Estate and Main Sale catalogues are scheduled to close on 15th December 2025.

WAREHOUSE CLOSURE

EMPIRE TEAS (PVT) LTD

Please note that the Empire Teas (Pvt) Ltd Warehouse is closed until further notice.



# TEA MARKETS AROUND THE WORLD

## MOMBASA AUCTION

### 01ST,02ND AND 03RD DECEMBER 2025 (SALE NO.48)

Good general demand prevailed for the 154,774 packages (10,304,573.00 kilos) available in the market; 15.48% was unsold.

#### MARKETS

Pakistan Packers were more active with maintained participation from Yemen and other Middle Eastern countries. Afghanistan and Bazaar lent more support while Kazakhstan and other CIS states were less active. Egyptian Packers maintained absorption with more interest from UK. There was some enquiry from Russia with South Sudan less active. Sudan and Local Packers were absent. Somalia continued active at the lower end of the market.

#### OFFERINGS

Orthodox Grades - 4,600 packages ( 170,154.00 kilos) - 80.00% unsold.

Leaf Grades - 75,120 packages (4,922,925.00 kilos) - 14.32% unsold.

Dust Grades - 57,641 packages (4,318,656.00 kilos) - 13.74% unsold.

Secondary Grades - 17,413 packages ( 892,838.00 kilos) - 9.19% unsold.

#### LEAF GRADES (M2 & M3)

##### BP1:

Best - More irregular interest ranging between USC16, USC44 and USC48 dearer to easier by up to USC10 with a number of lines remaining unsold.

Brighter - Met irregular but strong absorption and mostly gained by USC14, USC43 and USC74 with a few select invoices easing by up to USC10.

Mediums - KTDA mediums met irregular enquiry varying between firm to USC11 above previous rates to easier by USC7. Plantation mediums were well sought after at USC20 dearer but select teas lost up to USC9.

Lower Medium - Were more irregular at mostly easier rates shedding by up to USC11 but a few teas were up to USC9 above previous levels.

Plainer - Irregular with better types dearer by up to USC16 while others were steady to USC6 below last rates.

##### PF1:

Best - Appreciated by up to USC19.

Brighter - Gained by up to USC17.

Mediums - KTDA mediums were dearer by up to USC20 while plantation mediums irregularly advanced by up to USC15.

Lower Medium - Were firm to mostly dearer by up to USC18.

Plainer - More irregular interest ranging between USC6 dearer to easier by up to USC13. Lower Medium - Irregularly shed by up to USC22.

Plainer - Improved absorption at firm to USC7 above last levels.

CTC QUOTATIONS	BP1 - USC	PF1 - USC
Best	265 – 390	306 – 375
Good	225 – 364	296 – 348
Good Medium	245 – 300	289 – 321
Medium (KTDA)	165 – 216	210 – 273
Medium (Plantations)	169 – 202	169 – 221
Lower Medium	120 – 181	140 – 210
Plainer	086 – 148	084 – 150

#### DUST GRADES (M1)

##### PDUST:

Best – Some irregular enquiry at firm to USC23 dearer with select lines up to USC6 below previous rates.

Brighter – Saw irregular interest ranging between steady to USC9 dearer to easier by up to USC8.

Mediums – KTDA mediums were mostly firm to USC10 dearer with select teas easier by a similar margin while plantation mediums gained up to USC11 to USC4 below previous rates.

Lower Medium – Were steady to mostly dearer by up to USC10 to easier by USC2 for some lines.

Plainer – Mostly shed by up to USC9 but some teas were up to USC7 above previous levels.

##### DUST1:

Best – Firm to USC13 dearer to USC6 easier.

Brighter – Held steady to USC14 above last rates while some invoices eased by USC7.

Mediums – KTDA mediums were more irregularly and varied between USC13 dearer to easier by up to USC14 while plantation mediums gained by up to USC8 to USC5 below last rates.

Lower Medium – Steady to USC12 dearer to easier by up to USC5.

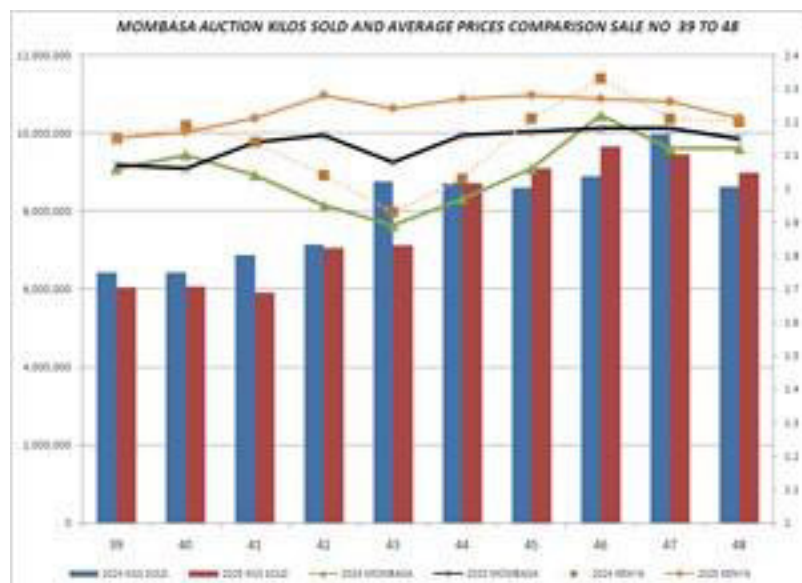
Plainer – Appreciated by up to USC14.

CTC QUOTATIONS	PDUST - USC	DUST1 - USC
Best	290 – 358	280 – 360
Good	272 – 342	266 – 319
Good Medium	250 – 303	267 – 307
Medium (KTDA)	165 – 230	170 – 270
Medium (Plantations)	170 – 194	140 – 185
Lower Medium	125 – 170	124 – 165
Plainer	081 – 126	094 – 131

#### SECONDARY GRADES (S1)

In the Secondary Catalogues, BPs were irregular while best types were dearer with PFs steady. Clean well sorted coloury Fannings held value with similar DUSTs selling at about previous levels. Other Fannings gained while DUSTs were firm. BMFs were well absorbed.

SECONDARY QUOTATIONS (USC)	BP/BP2	PF/PF2	FNGSI/FNGS	DUST/DUST2	BMF
<i>Best / Good</i>	228 – 322	202 – 231	160 – 225	152 – 287	-
<i>Good Medium / Medium</i>	-	-	130 – 189	124 – 191	-
<i>Lower Medium</i>	132 – 170	085 – 146	107 – 146	094 – 146	100 -113
<i>Plainer</i>	090 – 094	086 – 122	084 – 107	082 – 108	085 -106



Courtesy - Africa Tea Brokers Limited.

## BANGLADESH AUCTION

### 08TH DECEMBER 2025 (SALE NO.31)

CTC LEAF: 51,112 packages of tea on offer met with a strong demand.

BROKENS: Well made good liquoring Brokens were a strong market and realised prices around last levels. Their smaller varieties once again attracted good competition and were mostly firm. Medium varieties were a good market and sold at around last levels. Plainer types continued to be a fairly good market and were steady. BLF teas met with a little less demand and withdrawals were a little more than last.

FANNINGS: Well made good liquoring Fannings were again a strong feature and prices were fully firm to occasionally dearer. Medium and plainer types met with a good market and were about steady. BLF teas met with a little less demand and withdrawals were a little more than last.

DUST: 10,244 packages of tea on offer met with strong demand. Good liquoring Dusts were a dearer market and advanced by Tk.3/- to Tk.5/- closely following quality. Their Mediums were firm on last. Likewise, plain/BLF Dusts met with a good market and saw only a few withdrawals. Blenders lent strong support with fair interest from the Loose tea buyers.

COMMENTS: The best varieties on offer continued to meet with a good competition particularly from the Blenders who were the mainstay of the market. Loose tea buyers were selective.

Dusts were a dearer market.

Our Catalogue: (Sale 31) Avg : Tk 265.06, Sold 83.01% , (Sale 30) Avg : Tk 262.99, Sold 89.87%.

QUOTATIONS	BROKENS	QUOTATIONS	FANNINGS
<i>Best</i>	2.24-2.32	<i>Best</i>	2.24-2.32
<i>Good</i>	2.14-2.22	<i>Good</i>	2.14-2.22
<i>Medium</i>	2.07-2.11	<i>Medium</i>	2.08-2.12
<i>Plain</i>	2.01-2.06	<i>Plain</i>	2.01-2.06
<i>BLF</i>	1.97-2.03	<i>BLF</i>	1.97-2.06

Courtesy - National Brokers Limited.

# TEA MARKETS AROUND THE WORLD

## COONNOOR AUCTION

05TH DECEMBER 2025 (SALE NO.49)

### CTC LEAF

DEMAND: Good but erratic pattern.

MARKET: The total CTC leaf teas sold this week was 85.34% (1078105.94kgs) of the total offering of 1263300.39Kgs. Very limited teas were on offer from the best category and prices were irregular and lower, good teas were barely steady barring a few invoices in the medium broken which fetched dearer prices due to competition. Better medium teas prices ruled irregularly around last levels. The medium & Plainer sorts continue with prices at barely steady levels.

BUYING PATTERN: Major blenders continue to be the mainstay and picked up 66.62% of the total CTC leaf sold. Regional packers, local & up-country buyers continued to be selective on the best and good category teas. Exporters to Iraq continued to be active on the larger and medium broken with CIS, Russia and the middle east being selective.

### ORTHODOX LEAF

DEMAND: Reduced demand.

MARKET: Whole leaf grades continue to suffer easier market with prices declining hugely with fair withdrawals. The broken grades too were at easier levels. Fanning sold barely steady to easier.

BUYING PATTERN: CIS selective. Middle East & Russia were selective and more price sensitive on the whole leaf grades and secondary broken. Upcountry buyers were subdued. Internal buyers operated on the fanning.

### CTC DUST

DEMAND: Good demand.

MARKET: CTC dust offer this week was at 346404.39Kgs of which 296357.97kgs were sold (85.55%). Best & good category teas sold at irregular and easier levels in line with quality and competition. Better Medium teas sold firm to dearer. Medium & plainer teas were irregularly around last.

BUYING PATTERN: Major blenders were selective. Regional packers and the up-country buyers operated selectively on good and better medium teas. Exporters to CIS & Russia continued to be active on the medium & plainer blacker sorts.

### ORTHODOX DUST

DEMAND: Selective demand.

MARKET: High grown primary sold irregular with select few invoices fetching dearer prices. Secondaries ruled a firm market.

BUYING PATTERN: Internal & regional packers were selective. Exporters were choosy on the secondary dust.

Courtesy - J.Thomas & Co. Pvt. Ltd



# TEA MARKETS AROUND THE WORLD

## KOLKATA AUCTION

09TH DECEMBER 2025 (SALE NO.50)

	2025	2024	DIFFERENCE
CTC	1,16,728	1,18,856	-2,128
ORTHODOX	65,813	51,958	13,855
DUST	49,832	34,617	15,215

### CTC LEAF

#### MARKET REPORT:

Market opened to good demand. Assams seen so far tending easier and selling at lower levels. Browner/fibrous sorts seeing some withdrawals. Medium and plainer Dooars selling around last levels.

#### BUYING PATTERN:

Western India - Supporting the better teas on offer

HUL - Operating

Teloijan - Operating primarily on the mediums

Other internal/Local - Fair support

Exporters - Operating on bolder broken and fannings

### ORTHODOX LEAF

#### MARKET REPORT:

Market opened to strong demand. Well made Whole Leaf and Broken selling around last levels. Remainder Whole Leaf and Broken tending irregular and at times lower following quality. Cleaner Secondaries irregular around last. Browner stalkier Secondaries tending lower following quality.

#### BUYING PATTERN:

Middle East - Active

CIS - Operating

HUL - Selective

Courtesy - J.Thomas & Co. Pvt. Ltd

## COCHIN AUCTION

02ND DECEMBER 2025 (SALE NO.49)

	2025 Kgs	2024 Kgs	Difference
ORX LEAF	3,42,678	2,22,073	1,20,605
CTC LEAF	38,523	75,808	(37,285)
TOTAL	3,81,201	2,97,881	83,320

### COCHIN LEAF

#### Market Report - Orthodox Teas

#### Market Overview

The Orthodox segment reflected a steady to firm undertone, supported by active participation from the Middle East buyers and fair support from the C.I.S. channel while HUL remained selective. Better-made whole leaf grades received active export support, maintaining firm to slightly dearer levels, while liquoring grades held steady on quality lines, with improved makes commanding small premiums. Medium and plainer types encountered selective enquiry and often sold easier than last sold. Unsold quantities were limited to lower-end teas where quality and market value did not align. Clearance was satisfactory among the better grades.

#### Market Report - CTC Teas

#### Market Overview

The CTC market continued to attract good demand and improved competition for quality teas from Exporters and the Internal segment while the Major Blender's interest were selective but steady. Brighter liquoring teas showed sustained competition, selling at firm to slightly dearer levels over last sale, while medium and plainer grades met irregular demand and occasionally eased, depending on quality. Fannings drew fair interest from domestic Packeteers and Exporters, trading mostly around steady levels. Withdrawals were minimal and confined to plainer or medium lines where reserve limits were above market expectations. The overall clearance remained satisfactory.

Courtesy - J.T. COCHIN

# TEA MARKETS AROUND THE WORLD

## SILIGURI AUCTION

**03RD DECEMBER 2025**

	2025-2026	2024-2025	DIFFERENCE
CTC	162,273	161,114	1,159
DARJEELING	-	-	-
GREEN	-	-	-
DUST	14,869	12,821	2,048
<b>TOTAL</b>	<b>177,142</b>	<b>173,935</b>	<b>3,207</b>

### CTC LEAF MARKET REPORT

STAC OFFERINGS IN PACKAGES (SALE NO 49)

DEMAND / MARKET DETAILS: Market opened to good demand. Good and Best sorts are selling at irregularly easier levels following quality. Medium and Plainer teas are yet to be seen.

### BUYING PATTERN:

Internal/ Local Packeteers : Mainstay

TCPL/HUL : Silent so far

W.I : Selective so far

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

## MALAWI AUCTION

**03RD DECEMBER 2025 (SALE NO.49)**

There was fair demand following quality for the 2120 packages on offer at firm to dearer rates where sold.

BP1/PD- N/A.

PF1 - Single invoice sold 4USC up on last, balance were taken out.

D1 were up to 4USC dearer on last.

PF1SC - Single invoice fetched 6USC dearer, balance were taken out.

Secondaries held firm to 4USC dearer.

Courtesy - TEA BROKERS CENTRAL AFRICA LIMITED

## GUWAHATI AUCTION

**09TH DECEMBER 2025 (SALE NO.50)**

### Opening Market Report

Market: CTC

Fair demand at generally steady to easier rates following quality. (ATB running at 63%).

Buying Pattern: CTC

HUL/ Western India/ North India/ Beria Consultants LLP/ Exporters operating.

Courtesy - ASSOCIATED BROKERS PVT. LTD.



### AMENDED TEA SALE ARRANGEMENTS FOR DECEMBER 2025

Sale No.	Date of Sale	Catalogue Closing Dates Ex-Estate & Main Sale	Prompt Dates		10% Payment	E-Platform Levy Prompt Dates		VAT Summary	VAT Prompt Dates	
			Buyers	Sellers		Buyers	Sellers		Buyers	Sellers
DECEMBER 2025										
47	Mon 08 <sup>th</sup> & Tue 09 <sup>th</sup>	N/A	15-Dec-2025	16-Dec-2025	12-Dec-2025	15-Dec-2025	17-Dec-2025	N/A	N/A	N/A
48	Mon 15 <sup>th</sup> & Tue 16 <sup>th</sup>	N/A	22-Dec-2025	23-Dec-2025	19-Dec-2025	22-Dec-2025	24-Dec-2025	N/A	N/A	N/A
49	Mon 22 <sup>nd</sup> & Tue 23 <sup>rd</sup>	N/A	29-Dec-2025	30-Dec-2025	29-Dec-2025	29-Dec-2025	02-Jan-2026	N/A	N/A	N/A
50	Tue 30 <sup>th</sup>	08/12/2025 at 4.30 p.m.	05-Jan-2026	06-Jan-2026	02-Jan-2026	05-Jan-2026	07-Jan-2026	31-Dec-2025	05-Jan-2026	06-Jan-2026

### HOLIDAYS FOR THE FOURTH QUARTER OF 2025

Thursday, 04<sup>th</sup> December – Unduvap Full Moon Poya Day

Thursday, 25<sup>th</sup> December – Christmas Day



## TEA SALE ARRANGEMENTS FOR THE FIRST QUARTER OF 2026

### JANUARY / FEBRUARY / MARCH

#### APPLICABLE TO BUYERS WITH BANK GUARANTEES - ON VAT

Sale No.	Date of Sale	Catalogue Closing Dates Ex-Estate & Main Sale	Prompt Dates		10% Payment	E-Platform Levy Prompt Dates		VAT Summary	VAT Prompt Dates		Buyer Tins to be delivered to Brokers	Tins available for collection from Brokers
			Buyers	Sellers		Buyers	Sellers		Buyers	Sellers		
JANUARY 2026												
01	Tue 06 <sup>th</sup> & Wed 07 <sup>th</sup>	15/12/2025 at 4.30 p.m.	13-Jan-2026	14-Jan-2026	09-Jan-2026	13-Jan-2026	16-Jan-2026	Nil	Nil	Nil	11-Dec-2025	17/18-Dec 2025
02	Mon 12 <sup>th</sup> & Tue 13 <sup>th</sup>	22/12/2025 at 4.30 p.m.	19-Jan-2026	20-Jan-2026	16-Jan-2026	19-Jan-2026	21-Jan-2026	Nil	Nil	Nil	18-Dec-2025	29/30-Dec-2025
03	Tue 20 <sup>th</sup> & Wed 21 <sup>st</sup>	02/01/2026 at 4.30 p.m.	27-Jan-2026	28-Jan-2026	23-Jan-2026	27-Jan-2026	29-Jan-2026	Nil	Nil	Nil	02-Jan-2026	08/09-Jan-2026
04	Tue 27 <sup>th</sup> & Wed 28 <sup>th</sup>	08/01/2026 at 4.30 p.m.	03-Feb-2026	05-Feb-2026	30-Jan-2026	03-Feb-2026	06-Feb-2026	30-Jan-2026	03-Feb-2026	05-Feb-2026	08-Jan-2026	14/16-Jan-2026
FEBRUARY 2026												
05	Mon 02 <sup>nd</sup> & Tue 03 <sup>rd</sup>	16/01/2026 at 4.30 p.m.	09-Feb-2026	10-Feb-2026	06-Feb-2026	09-Feb-2026	11-Feb-2026	Nil	Nil	Nil	16-Jan-2026	22/23-Jan-2026
06	Tue 10 <sup>th</sup> & Wed 11 <sup>th</sup>	22/01/2026 at 4.30 p.m.	17-Feb-2026	18-Feb-2026	13-Feb-2026	17-Feb-2026	19-Feb-2026	Nil	Nil	Nil	22-Jan-2026	28/29-Jan-2026
07	Tue 17 <sup>th</sup> & Wed 18 <sup>th</sup>	29/01/2026 at 4.30 p.m.	24-Feb-2026	25-Feb-2026	20-Feb-2026	24-Feb-2026	26-Feb-2026	Nil	Nil	Nil	29-Jan-2026	05/06-Feb-2026
08	Tue 24 <sup>th</sup> & Wed 25 <sup>th</sup>	06/02/2026 at 4.30 p.m.	03-Mar-2026	04-Mar-2026	27-Feb-2026	03-Mar-2026	05-Mar-2026	27-Feb-2026	04-Mar-2026	05-Mar-2026	06-Feb-2026	12/13-Feb-2026
MARCH 2026												
09	Tue 03 <sup>rd</sup> & Wed 04 <sup>th</sup>	12/02/2026 at 4.30 p.m.	10-Mar-2026	11-Mar-2026	06-Mar-2026	10-Mar-2026	12-Mar-2026	Nil	Nil	Nil	12-Feb-2026	18/19-Feb-2026
10	Tue 10 <sup>th</sup> & Wed 11 <sup>th</sup>	19/02/2026 at 4.30 p.m.	17-Mar-2026	18-Mar-2026	13-Mar-2026	17-Mar-2026	19-Mar-2026	Nil	Nil	Nil	19-Feb-2026	25/26-Feb-2026
11	Tue 17 <sup>th</sup> & Wed 18 <sup>th</sup>	26/02/2026 at 4.30 p.m.	24-Mar-2026	25-Mar-2026	20-Mar-2026	24-Mar-2026	26-Mar-2026	Nil	Nil	Nil	26-Feb-2026	04/05-Mar-2026
12	Tue 24 <sup>th</sup> & Wed 25 <sup>th</sup>	05/03/2025 at 4.30 p.m.	31-Mar-2026	02-Apr-2026	27-Mar-2026	31-Mar-2026	06-Apr-2025	Nil	Nil	Nil	05-Mar-2026	11/12-Mar-2026
13	Mon 30 <sup>th</sup> & Tue 31 <sup>st</sup>	12/03/2025 at 4.30 p.m.	06-Apr-2026	07-Apr-2026	N/A	06-Apr-2026	08-Apr-2026	31-Mar-2026	06-Apr-2026	07-Apr-2026	12-Mar-2026	18/19-Mar-2026

#### HOLIDAYS FOR THE FIRST QUARTER OF 2026

Saturday, 3<sup>rd</sup> January – Duruthu Full Moon Poya Day

Thursday, 15<sup>th</sup> January – Thai Pongal Day

Sunday, 1<sup>st</sup> February – Nawam Full Moon Poya Day

Wednesday, 4<sup>th</sup> February – Independence Day

Sunday, 15<sup>th</sup> February – Mahasivarathri Day

Monday, 2<sup>nd</sup> March – Medin Full Moon Poya Day

Saturday, 21<sup>st</sup> March – Id-Ul-Fitr (Ramazan Festival Day)

## TEA SALE ARRANGEMENTS FOR THE FIRST QUARTER OF 2026

### JANUARY / FEBRUARY / MARCH

#### APPLICABLE TO BUYERS WHO PAY VAT WEEKLY

Sale No.	Date of Sale	Catalogue Closing Dates Ex-Estate & Main Sale	Prompt Dates		10% Payment	E-Platform Levy Prompt Dates		Buyer Tins to be delivered to Brokers	Tins available for collection from Brokers
			Buyers	Sellers		Buyers	Sellers		
JANUARY 2026									
01	Tue 06 <sup>th</sup> & Wed 07 <sup>th</sup>	15/12/2025 at 4.30 p.m.	13-Jan-2026	14-Jan-2026	09-Jan-2026	13-Jan-2026	16-Jan-2026	11-Dec-2025	17/18-Dec 2025
02	Mon 12 <sup>th</sup> & Tue 13 <sup>th</sup>	22/12/2025 at 4.30 p.m.	19-Jan-2026	20-Jan-2026	16-Jan-2026	19-Jan-2026	21-Jan-2026	18-Dec-2025	29/30-Dec-2025
03	Tue 20 <sup>th</sup> & Wed 21 <sup>st</sup>	02/01/2026 at 4.30 p.m.	27-Jan-2026	28-Jan-2026	23-Jan-2026	27-Jan-2026	29-Jan-2026	02-Jan-2026	08/09-Jan-2026
04	Tue 27 <sup>th</sup> & Wed 28 <sup>th</sup>	08/01/2026 at 4.30 p.m.	03-Feb-2026	05-Feb-2026	30-Jan-2026	03-Feb-2026	06-Feb-2026	08-Jan-2026	14/16-Jan-2026
FEBRUARY 2026									
05	Mon 02 <sup>nd</sup> & Tue 03 <sup>rd</sup>	16/01/2026 at 4.30 p.m.	09-Feb-2026	10-Feb-2026	06-Feb-2026	09-Feb-2026	11-Feb-2026	16-Jan-2026	22/23-Jan-2026
06	Tue 10 <sup>th</sup> & Wed 11 <sup>th</sup>	22/01/2026 at 4.30 p.m.	17-Feb-2026	18-Feb-2026	13-Feb-2026	17-Feb-2026	19-Feb-2026	22-Jan-2026	28/29-Jan-2026
07	Tue 17 <sup>th</sup> & Wed 18 <sup>th</sup>	29/01/2026 at 4.30 p.m.	24-Feb-2026	25-Feb-2026	20-Feb-2026	24-Feb-2026	26-Feb-2026	29-Jan-2026	05/06-Feb-2026
08	Tue 24 <sup>th</sup> & Wed 25 <sup>th</sup>	06/02/2026 at 4.30 p.m.	03-Mar-2026	04-Mar-2026	27-Feb-2026	03-Mar-2026	05-Mar-2026	06-Feb-2026	12/13-Feb-2026
MARCH 2026									
09	Tue 03 <sup>rd</sup> & Wed 04 <sup>th</sup>	12/02/2026 at 4.30 p.m.	10-Mar-2026	11-Mar-2026	06-Mar-2026	10-Mar-2026	12-Mar-2026	12-Feb-2026	18/19-Feb-2026
10	Tue 10 <sup>th</sup> & Wed 11 <sup>th</sup>	19/02/2026 at 4.30 p.m.	17-Mar-2026	18-Mar-2026	13-Mar-2026	17-Mar-2026	19-Mar-2026	19-Feb-2026	25/26-Feb-2026
11	Tue 17 <sup>th</sup> & Wed 18 <sup>th</sup>	26/02/2026 at 4.30 p.m.	24-Mar-2026	25-Mar-2026	20-Mar-2026	24-Mar-2026	26-Mar-2026	26-Feb-2026	04/05-Mar-2026
12	Tue 24 <sup>th</sup> & Wed 25 <sup>th</sup>	05/03/2025 at 4.30 p.m.	31-Mar-2026	02-Apr-2026	27-Mar-2026	31-Mar-2026	06-Apr-2025	05-Mar-2026	11/12-Mar-2026
13	Mon 30 <sup>th</sup> & Tue 31 <sup>st</sup>	12/03/2025 at 4.30 p.m.	06-Apr-2026	07-Apr-2026	N/A	06-Apr-2026	08-Apr-2026	12-Mar-2026	18/19-Mar-2026