

FORBES & WALKER TEA BROKERS PVT LTD

WEEKLY TEA MARKET REPORT

SALE NO

35

09TH/10TH SEPTEMBER 2025



Overall Market

	QTY (M/KGS)	DEMAND
Ex Estate	0.65	Good
High & Medium	0.65	Good
Leafy	0.74	Fair
Semi Leafy	0.64	Fair
Tippy/Small Leaf	0.88	Fair
Premium Flowery	0.05	Fair
Off Grade	1.15	Fair
Dust	0.42	Good
Total	5.18	Good general

ORDER OF SALE

SALE NO: 35

09TH/10TH SEPTEMBER 2025

EX-ESTATE

Mercantile Produce Brokers (Pvt) Ltd

Eastern Brokers Ltd

Ceylon Tea Brokers PLC

Forbes & Walker Tea Brokers (Pvt) Ltd

BPML Produce Marketing (Pvt) Ltd

Asia Siyaka Commodities PLC

John Keells PLC

Lanka Commodity Brokers Ltd

LG LARGE LEAF LG SMALL LEAF/BOP1A/ PREMIUM

John Keells PLC

BPML Produce Marketing (Pvt) Ltd

Ceylon Tea Brokers PLC

Forbes & Walker Tea Brokers (Pvt) Ltd

Eastern Brokers Ltd

Mercantile Produce Brokers (Pvt) Ltd

Asia Siyaka Commodities PLC

Lanka Commodity Brokers Ltd

HIGH & MEDIUM/OFF GRADE /DUST

BPML Produce Marketing (Pvt) Ltd

Forbes & Walker Tea Brokers (Pvt) Ltd

Mercantile Produce Brokers (Pvt) Ltd

Asia Siyaka Commodities PLC

John Keells PLC

Eastern Brokers Ltd

Ceylon Tea Brokers PLC

Lanka Commodity Brokers Ltd

AUCTION DETAILS

AT THIS WEEK'S SALE 10,763 LOTS TOTALLING 5,183,611 KGS WERE ON OFFER. THE BREAKDOWN IS AS FOLLOWS:

LOTS	QUANTITY
697	651,675
1,506	646,734
1,981	744,364
1,544	642,756
1,906	879,740
361	47,666
2,276	1,146,630
492	424,046
10,763	5,183,611
786	416,833
	697 1,506 1,981 1,544 1,906 361 2,276 492 10,763

SETTLEMENT DATES

12/09/2025 16/09/2025 17/09/2025

10% Payment

Buyers Prompt

Sellers Prompt

Quality

Overall, fairly similar to last.

COMMENTS

Overall Auction offerings were barely maintained and totalled 5.18 M/Kgs. There was good general demand although at irregular rates.

Ex-Estate offerings continued to be limited to 0.65 M/Kgs. Overall quality of teas showed no significant change.

Best Western BOP/BOPF's - A few select invoices appreciated by up to Rs. 50 per kg, whilst the others were irregular and often easier following quality. In the Below Best category, clean leaf coloury BOP's were firm and Rs. 20 per kg dearer, whilst the others were lower by Rs. 20-40 per kg. Corresponding BOPF's - Teas in the higher price bracket declined by Rs. 20-40 per kg, whilst the others sold around last week's levels. Plainer BOP/BOPF's were barely steady. Nuwara Eliyas' continued to be a weak feature with a majority of the tea remaining unsold. Uda Pussellawa BOP/BOPF's selling at the lower end of the market and in the backdrop of the limited availability, appreciated by Rs. 20 per kg and more. Uva BOP's sold around last levels, whilst the corresponding BOPF's declined by an average Rs. 20 per kg.

High & Medium Grown CTC teas - BP1's had hardly any offerings. PF1's - A few select invoices, where quality was maintained, sold around last, whilst the others were easier. However, teas at the lower end of the market witnessed better demand and consequently, fewer unsolds this week. Corresponding Low Grown types - BP1's had hardly any offerings. PF1's continued to sell well with a few select invoices appreciating by Rs. 20 per kg.

Low Growns totalled approximately 2.3 M/Kgs, with fair demand witnessed in the Leafy, Semi-Leafy, Tippy and Premium categories.

In the Leafy and Semi-Leafy catalogues, BOP1's in general were firm. Well-made OP1's maintained, whist the balance were irregular. A selection of Select Best OP's appreciated, whilst the balance sold at last levels. Select Best OPA's were firm to selectively dearer, whilst the balance maintained. Well-made PEK/PEK1's appreciated, whilst the mixed/open varieties were irregular. Teas at the bottom sold at last levels.

In the Tippy catalogue, select Best and Best FBOP's were easier, whilst the Below Best together with teas at the bottom were firm. Select Best and Best FF1's were easier, whilst the Below Best together with teas at the bottom sold at last levels.

In the Premium catalogue, a selection of Very Tippy Teas sold around last levels, whilst the balance in general were easier.

World Tea News

Indian tea continues to struggle

The Indian tea industry is battling a tough season in 2025, grappling with multiple challenges – from production shortfalls and falling auction prices to a surge in imports that's hurting domestic producers.

While production figures for the first half of 2025 show a rebound from the dismal 2024 levels, they still fall short of 2023, raising deep concerns about the industry's sustainability.

All-India tea production dropped by nearly 8 per cent in 2024 due to erratic weather and pest attacks. Although there has been a recovery of around 25.76 per cent between January and May this year, much of that growth is relative to last year's poor crop.

West Bengal and Assam – the two major tea-producing states – registered 44 per cent and 14 per cent growth respectively over 2024. However, the recovery has been modest for big growers, with production still down by 12.89 per cent in West Bengal and 8.65 per cent in Assam when compared to 2023 levels.

Darjeeling tea, globally renowned for its distinctive flavour, remains a serious concern. Its production in 2025 lags 10.34 per cent behind 2024 and 18.24 per cent behind 2023. Worsening matters, the June–July 2025 period witnessed

severe climatic stress. A 2°C rise in temperatures and reduced rainfall led to 20–25 per cent crop losses across key tea regions, with July expected to record a further 15–20 per cent decline.

This supply stress has not translated into better prices. Between April and July 2025, CTC leaf and dust auction prices fell by nearly 7 per cent in Assam and 9.5 per cent in the Dooars/Terai regions. The situation has been aggravated by a massive surge in imports – up by 82 per cent in 2024, with Kenya and Nepal

accounting for 74 per cent of the total. The influx of lower-priced teas continues in 2025, depressing price realizations and pressuring Indian producers.

On the export front, India shipped 85.77 million kg of tea from January to April 2025, a marginal dip of 0.22 per cent compared to last year. While North India posted gains, South India saw a sharp fall in volumes.

The industry stands at a critical juncture, and unless urgent steps are taken to address climate impacts, price instability, and unchecked imports, the future of Indian tea remains uncertain.

Source: The Statesman (Extracts), Courtesy: Tea Exporters' Association Sri Lanka

CROP AND WEATHER

FOR THE PERIOD 02 - 08 September 2025

Western/Nuwara Eliya Regions



Both regions reported sunny weather throughout the week. The Department of Meteorology, expects intermitted showers in the Nuwara Eliya and Western regions in the week ahead.

Uva/Udapussellawa Regions



Bright weather was reported in the Uva and Uda Pussellawa regions throughout the week. Showers are expected in both regions in the week ahead, according to the Department of Meteorology.

Low Growns



The Low Grown region reported sunny weather throughout the week. According to the Department of Meteorology, rain is expected in the Low Grown region in the week ahead.

Crop

The Western and Nuwara Eliya regions recorded an increase in the crop intake, whilst the Uva, Uda Pussellawa and Low Grown regions showed a slight decrease.



HIGH GROWN TEAS



BOP Best Western's - A few select invoices were firm and up to Rs. 50 per kg dearer, whilst the others were irregular

following quality. In the Below Best category, clean leaf coloury sorts were firm and Rs. 20 per kg dearer, whilst the others were lower by Rs. 20-40 per kg. Plainer sorts were barely steady. Nuwara Eliya's were mostly unsold. Uda

Pussellawa's were firm and Rs. 20 per kg dearer. Uva's sold around last week's levels.

BOPF Best Western's - A few select invoices appreciated by up to Rs. 50 per kg and more following special inquiry, whilst the

others were irregular following quality. In the Below Best category, teas in the higher price bracket were often easier by Rs. 20-40 per kg, whilst the others and teas at the lower end of the market continued to sell around last week's levels. Nuwara Eliya's were mostly unsold. Uda Pussellawa's were firm and tended dearer. Uva's were firm and Rs. 20

per kg easier, on average.

OP/OPA Well-made varieties were firm to dearer by Rs. 20 per kg, whilst the others and poorer sorts were firm on last levels.

PEKOE/PEKOE1 Flavoury PEK's and Orthodox Leafy PEK's were dearer by Rs. 20-40 per kg. PEK1's were lower by Rs. 30-50 per kg. Best

Rotovane PEK's declined by Rs. 50-100 per kg following quality/special inquiry, whilst the Below Best and poorer sorts

declined to a lesser extent.

FBOP/FBOPF1 Flavoury FBOP/FBOPF1's were dearer by Rs. 20-40 per kg following quality, whilst the poorer sorts were difficult of

sale. Better Orthodox FBOP/FBOPF1's were easier by Rs. 30-50 per kg, whilst the others and teas at the lower end

were firm to easier by Rs. 20 per kg.

QUOTATIONS LKR	ВС	OP	ВО	PF	PEKOE	/FBOP	0	Р
SALE DTE	01/02	09/10	01/02	09/10	01/02	09/10	01/02	09/10
SALE DIE	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep
Best Westerns	1300-1440	1340 - 1480	1360-1550	1340 - 1600	1320-1950	1300 - 1850	1080-1140	1120 - 1220
Below Best Westerns	1200-1280	1200 - 1280	1240-1340	1260 - 1320	1140-1300	1200 - <mark>1280</mark>	1020-1040	1040 - 1060
Plainer Westerns	1000-1180	1060 - 1180	1100-1220	1100 - 1240	840-1100	820 - 920	940	920 - 940
Nuwara Eliyas	N/A	N/A	N/A	N/A	940-1320	1060 - 1300	1000	960 -
Brighter Udapussellawas	1060-1120	1080 - 1160	1120-1220	1180 - 1220	1340-1420	1220 - 1500	1080-1160	1100 - 1160
Other Udapussellawas	940-1040	1000 - 1060	980-1080	1080 - 1140	850-1220	900 - 1180	860-1060	960 - 1000
Best Uvas	1280-1340	1300 - 1340	1240-1300	1200 - 1280	1420-1850	1420 - 1950	1160-1280	1140 - 1280
Other Uvas	1200-1220	1260 - 1280	1200-1220	N/A	820-1400	780 - 1340	810-1100	870 - 1100

MEDIUM GROWN TEAS



Generally firm. **BOP**

Sold around last week's levels. **BOPF**

OP/OPA Well-made teas were dearer by Rs. 20-40 per kg, whilst the others and poorer sorts were firm to dearer.

PEKOE/PEKOE1 Best PEK's were firm to dearer by Rs. 20-40 per kg. PEK1's eased by Rs. 30-50 per kg, whilst the Below Best and others

were firm to easier by Rs. 20-30 per kg.

FBOP/FBOPF1 A few Select Best FBOP/FBOPF1's were firm, whilst the others eased by Rs. 30-50 per kg. Teas at the lower end were

firm to dearer by Rs. 20-30 per kg.

QUOTATIONS LKR	ВС)P	ВО	PF	PEKOE	/FBOP	0	Р
SALE DTE	01/02	09/10	01/02	09/10	01/02	09/10	01/02	09/10
JALE DIE	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep
Good Mediums	1440-1900	1380 - 1800	1180-1260	1140 - 1240	1460-2100	1440 - 2000	1160-1300	1200 - 1400
Other Mediums	800-1120	940 - 1160	900-1080	940 - 1040	870-1440	810 - 1420	700-1140	710 - 1180

UNORTHODOX / CTC TEAS

HIGH GROWN BP1s - Hardly any offerings. PF1s - Where quality was maintained, were firm, whilst the others were irregular.

BP1s - Irregular. PF1s - Better sorts were irregular and easier following quality, whilst the others witnessed better **MEDIUM GROWN**

demand to last though sold at irregular rates following quality.

LOW GROWN BP1s - Hardly any offerings. PF1s - Continued to sell well around last with select invoices appreciating by Rs. 20 per kg.

QUOTATIONS LKR	BP1		PF1		
SALE DTE	01/02	09/10	01/02	09/10	
JALL DIL	Sep	Sep	Sep	Sep	
High Grown	N/A	N/A	1000-1180	1020 - <mark>1180</mark>	
Medium Grown	N/A	N/A	980-1180	<mark>960</mark> - 1200	
Low Grown	1380-1420	1400 - 1420	1220-1460	1240 - <mark>1460</mark>	

OFF GRADES

Incline from last week
Decline from last week
Static Market

FGS1/FGS Teas in the Best category appreciated by Rs. 40 per kg and more as the sale progressed. Below Best varieties were

dearer by Rs. 40- 60 per kg and more as the sale progressed, whilst teas at the lower end of the market were selectively dearer. Low Growns - Clean leaf varieties were firm to dearer, whilst the others maintained. Teas at the bottom end of the market were firm on last. CTC - In general maintained at last levels, whilst the poorer varieties

declined by Rs. 20 per kg and more.

BROKENS Reducer varieties in the Best category were firm on last week's levels. Below Best sorts were irregularly lower by Rs.

20 per kg, whilst the poorer sorts were firm.

BOP1A Main Grade reducer varieties in the Best category maintained, whilst the balance where quality was maintained

gained by Rs. 10-20 per kg. Below Best varieties declined by Rs. 20 per kg. Poorer sorts were firm, whilst select

invoices eased by Rs. 10-20 per kg.

QUOTATIONS LKR	HIGH		MEDIUM		LOW	
SALE DTE	01/02	09/10	01/02	09/10	01/02	09/10
SALE DIE	Sep	Sep	Sep	Sep	Sep	Sep
Better Fannings (Orthodox)	800-1280	810 - <mark>1280</mark>	790-1060	790 - 1020	780-1000	790 - <mark>940</mark>
Better Fannings (CTC)	900	N/A	N/A	770 - 790	730-1240	770 - 840
Other Fannings (Orthodox)	600-790	600 - 800	560-780	550 - 780	520-770	550 - 780
Other Fannings (CTC)	N/A	N/A	580-690	610 - 710	540-690	530 740
Good Brokens	770-1000	760 - 1000	770-1260	760 - 1100	790-1300	780 1240
Other Brokens	580-760	640 - 750	600-760	600 - 750	550-780	550 770
Better BOP1As	780-920	780 - 920	780-1080	780 - 1060	780-1550	780 1500
Other BOP1As	730-760	710 - 760	740-760	720 - 760	620-770	610 770

DUSTS

DUST1 Select Best Dust1's were dearer by Rs. 50 per kg, whilst the Best varieties were firm to dearer by Rs. 20 per kg. The

Below Best and poorer sorts were dearer by Rs. 40-60 per kg. A few select invoices in the Low Grown Best category gained substantially following special inquiry, whilst the others remained firm. The Below Best varieties together with the poorer sorts were irregularly lower by Rs. 20 per kg. High and Medium Grown CTC's gained by Rs. 20-40 per kg,

whilst the Low Grown varieties remained firm.

DUST Clean leaf secondaries were dearer by Rs. 20-30 per kg, whilst the poorer sorts were irregularly dearer by Rs. 20 per

kg. The Low Grown Best varieties and poorer sorts were irregularly easier by Rs. 20 per kg.

QUOTATIONS LKR	HIG	Н	MEDIUM		LOW	
SALE DTE	01/02	09/10	01/02	09/10	01/02	09/10
SALE DIE	Sep	Sep	Sep	Sep	Sep	Sep
Better Primary Dust (Orthodox)	1220-1800	1220 - 1650	1080-1280	1080 - 1280	1050-1300	1080 - 1440
Better Primary Dust (CTC) P. Dust	1060-1200	1100 - 1220	1100-1200	1080 - 1160	1120-1480	1100 - 1460
Below Best Primary Dust (Orthodox)	1000-1200	1020 - 1200	860-1060	940 - 1060	810-1040	920 - 1060
Other Primary Dust (CTC) P. Dust	890-1040	1060 - 1080	960-1080	1020 - 1060	800-1100	940 - 1080
Other Primary Dust (Orthodox)	700-980	840 - 1000	540-850	890 - 920	520-800	850 - 900
Better Secondary Dust	980-1180	1000 - 1200	N/A	810 - 1020	950-1060	940 - 1020
Other Secondary Dust	600-960	580 - 980	600-780	620 - 800	560-940	490 - 920

LOW GROWN TEAS



FBOP/FBOP1 Select Best and Best FBOP's were easier, whilst the Below Best together with teas at the bottom were firm. The

bolder varieties together with the FBOP1's declined.

BOP In general, were firm to easier.

BOP1 In general, were firm.

OP1 Well-made OP1's were firm, whist the balance were irregular.

OP A selection of Select Best OP's appreciated, whilst the balance were fully firm.

OPA Select Best OPA's were firm to selectively dearer, whilst the balance were firm on last.

PEKOE Well-made PEK/PEK1's appreciated, whilst the mixed/open varieties were irregular. Teas at the bottom sold at last

levels.

BOPF's were firm on last.

FBOPF/FBOPF1 A selection of Very Tippy Teas sold around last levels, whilst the balance in general were easier. Select Best and Best

FF1's were easier, whilst the Below Best together with teas at the bottom sold at last levels.

QUOTATIONS LKR	SELECT	Γ BEST	ВЕ	ST	BELOV	/ BEST	ОТН	ERS
SALE DTE	01/02	09/10	01/02	09/10	01/02	09/10	01/02	09/10
JALE DIE	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep
FBOP 1	1800-1900	1700 - 1800	1400-1450	1400 - 1450	1200-1300	1200 - 1300	950-1000	900 - 1000
FBOP	1800-2400	1800 - 2400	1500-1550	1500 - 1550	1250-1300	1200 - 1300	900-950	900 - 950
BOP 1	2400-2950	2400 - 2900	1850-2350	1850 - 2350	1200-1400	1200 - 1400	850-1180	850 - 1180
ВОР	1900-2300	1900 - 2300	1450-1500	1400 - 1500	1200-1300	1200 - 1300	900-1000	900 - 1000
BOPF	1400-1600	1400 - 1600	950-1050	950 - 1050	850-900	850 - 900	800-850	800 - 850
FBOPF (TIPPY)/FBOPF SP	4300-5500	4000 - 5200	3600-4000	3400 - 3800	2400-2800	2200 - 2700	1000	1000 -
FBOPF 1	1600-1750	1600 - 1700	1400-1500	1400 - 1500	1280-1300	1250 - 1300	900-950	900 - 950
FBOPF	1700-1800	1600 - 1800	1450-1550	1400 - 1500	1150-1200	1150 - 1200	900-950	900 - 950
OP 1	2450-3100	2550 - 3150	2200-2400	2250 - 2500	1400-2150	1360 - 2200	900-1380	900 - 1340
ОР	1440-1550	1460 - 1550	1380-1420	1400 - 1440	1240-1360	1260 - 1380	880-1220	900 - 1240
OPA	1420-2000	1460 - 2000	1280-1400	1300 - 1440	1200-1260	1220 - 1280	880-1180	900 - 1200
РЕКОЕ	1600-2500	1650 - 3000	1480-1550	1500 - 1600	1280-1460	1300 - 1480	900-1260	900 - 1280
PEK 1	1800-2850	1850 - 3000	1650-1750	1700 - 1800	1400-1600	1420 - 1650	1000-1380	1000 - 1400

TOP PRICE

	WESTERN MEDI	LIM	
Ancoombro	WESTERN MEDI	JIVI	1900
Ancoombra	BOP		1800
Harangalla	BOP	@	1750
Dartry Valley	BOP	@	1750
Craighead	BOP	@	1550
Kenilworth	BOPSp		1400
Ancoombra	BOPSp		1400
Rilagala	BOPSp	@	1320
Dartry Valley	BOPF/BOPFSp	@	1320
Harangalla	BOPF/BOPFSp	@	1260
Vellai Oya	BOPF/BOPFSp	@	1240
Dartry Valley	BOP1	@	1750
Dartry Valley	FBOP/FBOP1	@	2000
Craighead	FBOP/FBOP1	@	1950
Craighead	FBOPF/FBOPF1	@	1650
Harangalla	FBOPF/FBOPF1	@	1650
Dartry Valley	FBOPF/FBOPF1	@	1600
Hatale	FBOPF/FBOPF1		1600
Greenwood	OP/OPA		1440
Dartry Valley	OP1	@	1480
Harangalla	OP1	@	1460
Hatale	OP1		1460
Craighead	PEK/PEK1	@	2000
Harangalla	PEK/PEK1	@	1950
Dartry Valley	PEK/PEK1	@	1950
Meezan	PEK/PEK1		1950
	WESTERN HIG	Н	
Inverness	ВОР		1480
Inverness Ingestre	BOP BOP	@	1480 1400
		@	
Ingestre	ВОР	_	1400
Ingestre Norwood	BOP	@	1400 1400
Ingestre Norwood Wanarajah	BOP BOP	@	1400 1400 1400
Ingestre Norwood Wanarajah Great Western	BOP BOP BOP	@ @ @	1400 1400 1400 1400
Ingestre Norwood Wanarajah Great Western Dessford	BOP BOP BOP BOP	@ @ @	1400 1400 1400 1400 1400
Ingestre Norwood Wanarajah Great Western Dessford Waltrim	BOP BOP BOP BOP BOP	@ @ @ @	1400 1400 1400 1400 1400 1400
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood	BOP BOP BOP BOP BOP	@ @ @ @	1400 1400 1400 1400 1400 1400
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western	BOP BOP BOP BOP BOPSP	@ @ @ @	1400 1400 1400 1400 1400 1400 1400
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness	BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1	@ @ @ @	1400 1400 1400 1400 1400 1400 1600 1800
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru	BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOP/FBOP1	@ @ @ @	1400 1400 1400 1400 1400 1400 1600 1800
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru	BOP BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOPF/FBOPF1	@ @ @	1400 1400 1400 1400 1400 1400 1600 1800 1850 1420
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru	BOP BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOP/FBOP1 FOP/FBOP1	@ @ @	1400 1400 1400 1400 1400 1400 1600 1800 1850 1420
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture	BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOP/FBOP1 CP/OPA OP1	@ @ @ @	1400 1400 1400 1400 1400 1400 1600 1800 1850 1420 1220
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture	BOP BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOPI FBOP/FBOP1 COP/OPA OP1 PEK/PEK1	@ @ @ @	1400 1400 1400 1400 1400 1400 1600 1800 1850 1420 1220
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture Frotoft Super	BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOPF/FBOPF1 OP/OPA OP1 PEK/PEK1	@ @ @ @	1400 1400 1400 1400 1400 1400 1600 1800 1850 1420 1220 1320 1850
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture Frotoft Super	BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOPI FBOP/FBOP1 FBOP/FBOPF1 OP/OPA OP1 PEK/PEK1 NUWARA ELIY/FBOP/FBOP1	@ @ @ @	1400 1400 1400 1400 1400 1400 1600 1850 1420 1220 1320 1850
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture Frotoft Super Court Lodge Kenmare	BOP BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOPF/FBOP1 OP/OPA OP1 PEK/PEK1 NUWARA ELIY/FBOP/FBOP1 OP/OPA	@ @ @ @	1400 1400 1400 1400 1400 1400 1400 1600 1850 1420 1220 1320 1850
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture Frotoft Super Court Lodge Kenmare Court Lodge	BOP BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOPI FBOP/FBOP1 OP/OPA OP1 PEK/PEK1 NUWARA ELIYA FBOP/FBOP1 OP/OPA OP/OPA	@ @ @ @	1400 1400 1400 1400 1400 1400 1400 1600 1850 1420 1320 1350 1300 1000 980
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture Frotoft Super Court Lodge Kenmare Court Lodge	BOP BOP BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOPF/FBOPF1 OP/OPA OP1 PEK/PEK1 NUWARA ELIYA FBOP/FBOP1 OP/OPA OP/OPA OP/OPA OP/OPA	@ @ @ @	1400 1400 1400 1400 1400 1400 1400 1600 1850 1420 1320 1350 1300 1000 980
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture Frotoft Super Court Lodge Kenmare Court Lodge Kenmare	BOP BOP BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOP/FBOP1 FBOP/FBOP1 OP/OPA OP1 PEK/PEK1 NUWARA ELIYA FBOP/FBOP1 OP/OPA OP/OPA OP/OPA OP/OPA OP/OPA UDAPUSSELLAW	@ @ @ @	1400 1400 1400 1400 1400 1400 1400 1600 1850 1420 1320 1350 1300 1300
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture Frotoft Super Court Lodge Kenmare Court Lodge Kenmare High Forest	BOP BOP BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOPF/FBOPF1 OP/OPA OP1 PEK/PEK1 NUWARA ELIYA FBOP/FBOP1 OP/OPA OP/OPA OP/OPA OP/OPA DP/OPA PEK/PEK1 UDAPUSSELLAW BOP	@ @ @ @	1400 1400 1400 1400 1400 1400 1400 1400
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture Frotoft Super Court Lodge Kenmare Court Lodge Kenmare High Forest Luckyland	BOP BOP BOP BOP BOP BOP BOP BOPSp BOPF/BOPFSp BOP1 FBOPF/FBOPF1 OP/OPA OP1 PEK/PEK1 NUWARA ELIY/ FBOP/FBOP1 OP/OPA OP/OPA DPI OP/OPA DPI OP/OPA BOPSP	@ @ @ @	1400 1400 1400 1400 1400 1400 1400 1600 1800 1850 1420 1320 1320 1300 1300 1280 1120
Ingestre Norwood Wanarajah Great Western Dessford Waltrim Norwood Great Western Inverness Cymru Cymru Cymru Venture Frotoft Super Court Lodge Kenmare Court Lodge Kenmare High Forest Luckyland	BOP BOP BOP BOP BOP BOP BOPS BOPF/BOPFSP BOPF/FBOPF1 OP/OPA OP1 PEK/PEK1 NUWARA ELIYA FBOP/FBOP1 OP/OPA OP/OPA OP/OPA DP/OPA BOPSP BOPSP BOPF/BOPFSP	@ @ @ @ ASS	1400 1400 1400 1400 1400 1400 1400 1400

	JDAPUSSELLAWAS		
Gonapitiya	FBOPF/FBOPF1		1380
Delmar	FBOPF/FBOPF1	@	1360
Maha Uva	OP/OPA	@	1200
Maha Uva	OP1	@	1320
Maha Uva	PEK/PEK1	@	1800
Delmar	PEK/PEK1		1700
	PEK/PEK1	@	1700
Gonapitiya	LOW GROWNS		1700
Andaradeniya Super	BOP		2900
New Spring View	BOPSp		2250
Kamarangapitiya	BOPSp	@	2200
	BOPF	w	1950
Kings Bru Sithaka			
	BOPF		1650
Ceciliyan	BOPF		1650
Pothotuwa	BOPF	@	1480
Rajjuruwatta Super	BOPFSp		2000
Sithaka	FBOP	_	2500
Kiruwanaganga	FBOP	@	2450
Wattahena	FBOP1		1900
Katanwila	FBOPF		2000
Gunawardana	FBOPF	@	1700
Pothotuwa	FBOPF1	@	1750
Sunrise	FBOPF1		1750
Lumbini	FBOPF1		1700
Kelani	FBOPF1	@	1650
Gunawardana	FBOPF1	@	1650
Adams View	FBOPF1	@	1650
New Batuwangala	FBOPF1		1650
Lakvinka	FBOPF1		1650
Hedigalla	FBOPF1		1650
Makandura	FBOPF1		1650
Hidellana	FBOPF1		1650
Sithaka	FBOPF1		1650
Alhewana Super	FBOPF1		1650
Sunrise	BOP1		2900
Pothotuwa	OP1	@	3150
Lucky Dais	OP		1550
Miriswatta	OP		1550
Sunrise	ОР		1550
Graceland	OP		1550
Ceyenta	OP		1550
Mulatiyana Hills	OP		1550
Nilgiri	OP		1550
Temple View Super	OP		1550
Win Hills	OP		1550
Sinara	OP		1550
Liyonta	OPA		2000
Lumbini	PEK		3000
202011			2000
Andaradeniva Sunor	PFK1		3000
Andaradeniya Super	PEK1		3000

	UVA MEDIUM		
Misty Uva	ВОР	@	1440
Hindagala	BOPSp		1420
Demodera	BOPSp	@	1420
Haputale Super	BOPSp	@	1380
Dickwella	BOPF/BOPFSp	@	1420
Telbedde	BOPF/BOPFSp	@	1420
Dickwella	BOP1		2000
Demodera	BOP1		2000
Roseland Uva	FBOP/FBOP1		1750
High Spring	FBOP/FBOP1		1750
Telbedde	FBOP/FBOP1	@	1600
Demodera	FBOPF/FBOPF1		1600
Hindagala	OP/OPA		1360
Dickwella	OP/OPA	@	1300
Misty Uva	OP/OPA	@	1280
Telbedde	OP1	@	1480
Uva Samovar	OP1	@	1380
Hindagala	OP1		1380
Halpewatta Uva	PEK/PEK1	@	1950
Misty Uva	PEK/PEK1	@	1900
High Spring	PEK/PEK1		1900
Aruna Keppetipola	PEK/PEK1		1900
	UVA HIGH		
Kelliebedde	ВОР	@	1300
Pitaratmalie	ВОР		1300
Nayabedde	ВОР	@	1280
Bandaraeliya	ВОР	@	1280
Craig	BOPSp		1420
Nayabedde	BOPF/BOPFSp	@	1280
Uva Highlands	BOP1	@	1480
Aislaby	FBOP/FBOP1		1950

	UVA HIGH						
Mount Uva	FBOPF/FBOPF1		1550				
Ellathota Uva	OP/OPA	@	1280				
Uva Highlands	OP1	@	1600				
Gonamotawa	PEK/PEK1	@	1900				
Ranaya	PEK/PEK1		1900				
ı	UNORTHODOX HI	GH					
Dunsinane CTC	PF1	@	1180				
Ulugedara CTC	PF1		1180				
UI	NORTHODOX MED	IUM					
Strathdon CTC	PF1	@	1200				
Park Side CTC	BP1		640				
Park Side CTC	BPS		600				
	UNORTHODOX LO	w					
Hingalgoda CTC	PF1		1460				
Ceciliyan CTC	BP1		1420				
PREMIUM FLOWERY							
Mulatiyana Hills	FBOPFSp		4300				
Greenwin Super	FBOPFSp		4300				
Ivy Hills	FBOPFExSp		5500				
Muswenna	FBOPFExSp1	@	4800				
	DUSTS						
Mattakelle	DUST1		1650				
Great Western	DUST1		1650				
Ceciliyan CTC	PD	@	1460				
	OFF GRADES						
Wanarajah	FGS/FGS1		1280				
Wattegodde	FGS/FGS1		1280				
Mattakelle	FGS/FGS1		1280				
Clydesdale	FGS/FGS1		1280				
Ceciliyan CTC	PF		840				
Allen Valley	BM		1240				
Gunawardana	ВМ	@	1200				
Allen Valley	ВР		1240				
Chandrika Estate	BOP1A		1500				

QUANTITY SOLD

	WEEKL	Y (KGS)	TODAT	E (KGS)
DURING THE PERIOD 01ST-06TH SEPTEMBER 2025	2025	2024	2025	2024
PRIVATE SALES	158,059	89,524	7,269,244	4,276,319
PUBLIC AUCTION	4,398,633	4,757,310	170,649,871	163,069,606
FORWARD CONTRACTS	26,008	73,980	1,641,239	1,507,230
DIRECT SALES	NIL	NIL	NIL	NIL
TOTAL	4,582,700	4,920,814	179,560,354	168,853,155
BMF EXCLUDED FROM PRIVATE SALE	NIL	83,401	1,263,511	1,542,895

(QUANTITY SOLD AND THE AVERAGE PRICE PER AUCTION)

	Quantity (M/kgs)			A۱	AVG Price (LKR)			Avg Price (USD)		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	
27TH AUGUST 2025	4.54	5.03	4.92	1221.77	1212.16	1178.62	4.09	4.11	3.75	
02ND SEPTEMBER 2025	4.39	4.76	4.38	1188.35	1219.34	1205.21	3.98	4.11	3.79	

Source: Central Bank of Sri Lanka / Buying Rates

RATES OF EXCHANGE

SRI LANKA RUPEE APPROX PER UNIT OF CURRENCY

YEAR	2025	2024	2023
USD	298.25	294.48	314.81
STG.PD	403.35	384.50	396.18
EURO	349.79	323.87	338.13
YEN	2.01	2.01	2.13

Source: Central Bank of Sri Lanka / Buying Rates

PUBLIC AUCTION/GROSS SALES AVERAGE

SALE NO 34	W	EEKLY(LK	R)	TO	TODATE (LKR)			WEEKLY(USD)			TODATE(USD)		
01ST/ 02ND SEPTEMBER 2025	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023	
Uva High Grown	1037.78	1148.87	931.96	1038.73	1115.08	989.71	3.48	3.88	2.93	3.50	3.67	3.02	
Western High Grown	1203.87	1145.33	1064.07	1096.15	1191.77	1135.77	4.04	3.86	3.35	3.69	3.92	3.46	
CTC High Grown	1070.91	1018.45	930.28	1059.36	1104.02	1019.27	3.59	3.44	2.93	3.57	3.63	3.11	
High Grown (Summary)	1148.16	1146.57	1020.39	1077.33	1167.02	1089.12	3.85	3.87	3.21	3.63	3.84	3.32	
Uva Medium Grown	1069.13	1105.33	1071.94	1068.69	1143.50	1030.69	3.58	3.73	3.37	3.60	3.76	3.14	
Western Medium Grown	999.36	1001.93	1011.18	1004.25	1068.81	997.52	3.35	3.38	3.18	3.38	3.52	3.04	
CTC Medium Grown	918.58	936.86	881.40	939.49	976.86	927.84	3.08	3.16	2.77	3.16	3.21	2.83	
Medium Grown (Summary)	1018.49	1033.93	1026.40	1025.46	1094.23	1008.11	3.41	3.49	3.23	3.45	3.60	3.08	
Orthodox Low Grown	1259.06	1313.25	1314.05	1260.50	1378.86	1289.59	4.22	4.43	4.13	4.24	4.54	3.93	
CTC Low Grown	974.50	961.45	1056.41	979.88	1001.53	963.20	3.27	3.24	3.32	3.30	3.30	2.94	
Low Grown(Summary)	1240.63	1293.67	1300.67	1245.00	1354.66	1271.67	4.16	4.37	4.09	4.19	4.46	3.88	
Total	1188.35	1219.34	1205.21	1172.95	1270.02	1188.39	3.98	4.11	3.79	3.95	4.18	3.63	

Source: Oanda Exchange Rates Source: MSL - Averages



WORLD TEA PRODUCTION (M/KGS)

				TODATE			DIFFERE	NCE +/-		
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025		
Jul										
Sri Lanka	21.6	23.2	21.3	156.2	151.1	157.1	-5.1	6		
North India	150.3	127.6	151.4	504.1	441.3	504.2	-62.8	62.9		
South India	21.2	22.8	20.4	134.5	123.2	137.3	-11.3	14.1		

				TODATE			DIFFERE	NCE +/-		
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025		
Jun										
Bangladesh	10.7	12.8	9.8	26.4	24.3	22.5	-2.1	-1.8		
Kenya	48.1	46.2	42.4	273.6	323.3	283.2	49.7	-40.1		
Malawi	1.6	2.2	2.1	30.5	33.4	31.5	2.9	-1.9		

DETAILS OF AWAITING SALE

SALE NO: 36

Scheduled for 16TH/17TH SEPTEMBER 2025

	LOTS	QUANTITY
ExEstate	705	652,564
High & Medium	1,375	580,731
Leafy	1,877	700,732
Semi Leafy	1,473	609,841
Тірру	1,863	862,383
Premium Flowery	415	53,841
OffGrades	2,316	1,179,185
Dust	538	443,392
Total	10,562	5,082,669
RePrint	741	368,812

24/09/2025 23/09/2025 **Buyers Prompt Sellers Prompt**

This sale last year Sale No. 36 | 09TH/10TH SEPTEMBER 2024

Re-print Lots :917 :5,491,766 kgs :419,291 kgs Quantity Re-print Quantity

LOW GROWN CATALOGUES Violations Excluded 28/08/2025 **LEAFY SEMI-LEAFY** TIPPY Closed Closed Closed

OTHER MAIN SALE CATALOGUES

28/08/2025

HIGH & **PREMIUM** OFF **MEDIUM FLOWERY GRADES** Closed Closed Closed

NO .OF PKGS 136,285

СТС

9,687 Pkgs - 513,959 kgs

Approx Selling time of

ORDER OF SALE

Ex-Estate	LG Large Leaf//Semi Leafy/LG Small Leaf/BOP1A/ Premium	High & Medium/Off Grade /Dust	F&W Catalogu	es
EB CTB	BC CTB	FW MB	16TH SEPTEMBER 202:	5
FW	FW	AS	8.30am	Main Sale - High & Medium
BC	EB	JK	10.30am	Semi - Leafy Teas
AS	MB	EB	11.00am	Low Grown - Leafy Teas
JK	AS	СТВ	11.30am	Low Grown - Tippy Teas
LC	LC	LC	3.30pm	Off Grade
MB	JK	BC	4.00pm	BOP1A

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 17TH

SEPTEMBER 2025

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

DETAILS OF AWAITING SALE

SALE NO: 37

Scheduled for 23RD/24TH SEPTEMBER 2025

	LOTS	QUANTITY
ExEstate	710	682,114
High & Medium	1,430	618,683
Leafy	1,837	692,083
Semi Leafy	1,560	654,818
Tippy	1,900	887,182
Premium Flowery	413	56,256
OffGrades	2,240	1,167,988
Dust	500	418,697
Total	10,590	5,177,821
RePrint	790	395,682

30/09/2025 01/10/2025 Buyers Prompt Sellers Prompt

This sale last year

Sale No. 37 | 18TH SEPTEMBER 2024

Lots :8,374 Re-print Lots :042

Quantity :4,026,455 kgs Re-print Quantity :18,771 kgs LOW GROWN CATALOGUES

Violations Excluded

04/09/2025

LEAFY SEMI-LEAFY TIPPY

Closed Closed Closed

OTHER MAIN SALE CATALOGUES

04/09/2025

HIGH & PREMIUM OFF
MEDIUM FLOWERY GRADES
Closed Closed Closed

NO .OF PKGS 138,187

СТС

10,110 Pkgs - 534,705 kgs

CATALOGUE CLOSURE DETAILS

23/24

SEPTEMBER 2025

Sale No. 37

The Ex-Estate catalogue closed on 04th September 2025, excluding violations. The Main Sale catalogues too closed on 04th September 2025, excluding violations.

29/30

SEPTEMBER 2025

Sale No. 38

The Ex-Estate and Main Sale catalogues are scheduled to close on 11th September 2025.

07/08

OCTOBER 2025

Sale No. 39

The Ex-Estate and Main Sale catalogues are scheduled to close on 18th September 2025.

MOMBASA AUCTION

08TH AND 09TH SEPTEMBER 2025 (SALE NO.36)

Improved general demand prevailed for the 121,181 packages (8,179,301.00 kilos) offered in the market; 20.61% remained unsold.

Pakistan Packers and Bazaar lent more enquiry and were strong with improved interest from Yemen, other Middle Eastern countries and Afghanistan. Kazakhstan and other CIS states although selective, were less active while Egyptian Packers maintained interest. UK continued to lend selective support with some enquiry from Russia. Sudan re-entered the market showing some interest with maintained participation from South Sudan. Local Packers were absent while Somalia maintained good absorption at the lower end of the market.

OFFERINGS

Leaf Grades - 61,240 packages (4,012,198.00 kilos) - 23.84% unsold.

Dust Grades - 46,881 packages (3,495,477.00 kilos) - 21.33% unsold.

Secondary Grades - 13,060 packages (671,626.00 kilos) - 2.91% unsold.

LEAF GRADES (M2 & M3)

BP1:

Best - More irregular enquiry ranging between USC22 dearer to easier by up to USC12 and some teas were heavily discounted by USC90 and USC103.

Brighter - Appreciated by USC28 with other lines substantively dearer by USC108 and USC113.

Mediums - KTDA mediums were irregular and varied between firm to dearer by up to USC60, USC62 and USC83 to easier by up to USC5 with plantation mediums discounted by up to USC16.

Lower Medium - Gained by up to USC20.

Plainer - Shed up to USC6.

DF1

Best - Saw strong enquiry at steady to USC30 dearer but some invoices were selectively discounted by up to USC4.

Brighter - Mostly dearer by up to USC27.

Mediums - KTDA mediums mostly gained by up to USC19 with plantation mediums up to USC13 above previous rates to easier by up to USC4.

Lower Medium - Firm to USC22 dearer to selectively easier by up to USC6.

Plainer - Gained up to USC12 for the better categories with others steady to easier by up to USC9.

CTC QUOTATIONS	BP1 - USC	PF1 - USC
Best	260 - 396	320 - 430
Good	270 - 401	290 - 356
Good Medium	185 - 299	280 - 360
Medium (KTDA)	155 - 281	160 - 278
Medium (Plantations)	162 - 190	182 - 215
Lower Medium	137 - 178	140 - 194
Plainer	096 - 144	082 - 134

DUST GRADES (M1)

PDUST:

Best - Gained by up to USC24 but a few lines lost up to USC2.

Brighter - Advanced by up to USC28 with select invoices USC48 above previous rates.

Mediums - KTDA mediums were irregular ranging between USC10 dearer to easier by a similar margin while plantation mediums saw improved interest gaining by up to USC10 dearer for most teas.

Lower Medium - Mostly appreciated by up to USC8 but a few select lines shed up to USC5.

Plainer - Saw irregular interest and ranged between USC8 dearer to USC5 below last levels .

DUST1:

Best - Were dearer by up to USC26.

Brighter - Saw improved enquiry gaining by up to USC22.

Mediums - KTDA mediums were irregular varying between firm to USC10 dearer to easier by up to USC16 with plantation mediums mostly easier by up to USC14 but a few invoices were up to USC5 dearer.

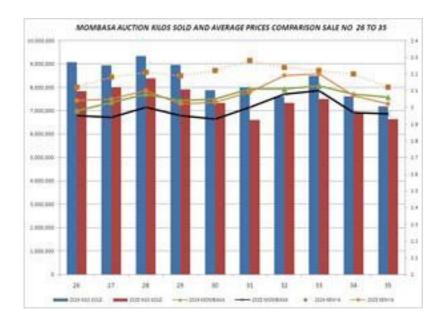
Lower Medium - Dearer by up to USC8.

Plainer - Were up to USC14 above last rates to easier by up to USC11.

CTC QUOTATIONS	PDUST - USC	DUST1 - USC
Best	255 - 368	320 - 376
Good	240 - 341	320 - 349
Good Medium	250 - 332	294 - 349
Medium (KTDA)	165 - 250	172 - 290
Medium (Plantations)	188 - 220	160 - 203
Lower Medium	125 - 212	130 - 172
Plainer	090 - 130	085 - 124

In the Secondary Catalogues, best BPs gained with others about firm while PFs held value. Clean well sorted coloury Fannings tended dearer with similar DUSTs appreciating. Other Fannings were generally steady while some lines advanced with DUSTs selling above previous levels. BMFs were well absorbed.

SECONDARY QUOTATIONS (USC)	BP/BP2	PF/PF2	FNGS1/ FNGS	DUST/ DUST2	BMF
Best/Good	192 - 310	217 - 244	130 - 229	140 - 270	-
Good Medium / Medium	27		110 - 150	110 - 142	- 2
Lower Medium	110 - 172	118 - 144	105 - 140	090 - 140	106 - 112
Plainer	085 - 098	084 - 119	085 - 112	084 - 104	086 - 108



Courtesy - Africa Tea Brokers Limited.

BANGLADESH AUCTION

08TH SEPTEMBER 2025 (SALE NO.18)

CTC LEAF: 47,695 packages of tea on offer met with a good demand.

BROKENS: Well made good liquoring Brokens again met with a strong demand and mostly sold at slightly dearer rates following competition. Medium varieties met with quite a fair market and were mostly firm. Plainer varieties met with only a fair demand at around last levels with some withdrawals. BLF teas were again quite a good market at around last levels.

FANNINGS: Good liquoring Fannings met with a good demand and were fully firm to occasionally dearer following competition. Medium and plainer varieties met with a fair demand at around last levels with some withdrawals for the plainer types. BLF teas were again quite a good market at around last levels. DUST: 10,856 packages of tea on offer met with a good demand. Select few good liquoring Dusts met with a good competition and sold at dearer rates. Others also sold well at around last levels. Mediums also met with a good demand and sold in line with quality. Plain/BLF Dusts witnessed less demand with more withdrawals. Blenders lent strong support with fair interest from the Loose tea buyers.

COMMENTS: There was a little more demand this week mainly emanating from the Blenders who were active for all varieties on offer. Loose tea buyers lent little more support.

Dusts were a dearer market.

Our Catalogue: (Sale 18) Avg : Tk 248.19, Sold 74.67% , (Sale 17) Avg : Tk 247.21, Sold 66.60%

QUOTATIONS	BROKENS	QUOTATIONS	2.10-2.15 2.06-2.10 2.02-2.04 2.02-2.04 1.65-1.86	
Best	2.10-2.19	Best		
Good	2.06-2.10	Good		
Medium	2.02-2.04	Medium		
Plain	2.02-2.04	Plain		
BLF	1.65-1.90	BLF		

Courtesy - National Brokers Limited.

COONOOR AUCTION

05TH SEPTEMBER 2025 (SALE NO.36)

The total CTC leaf teas sold this week was 87.27% (1,283,630.14kgs) of the total offering of 1,470,845.26Kgs DEMAND: - Good general demand prevailed this week with prices for all sorts maintaining at last levels.

MARKET: - Best & good teas continued with irregular prices. All other sorts witnessed teas selling at irregularly firm to slightly dearer prices. Fanning grade in all sorts, especially blacker types faced a surge in prices by Rs 3 to 5 or more.

BUYING PATTERN: - Major packers continued to be the mainstay of the market picking up 51.01% of CTC leaf teas sold. Increased buying was witnessed from exporters. Russia, Iraq, Middle East and CIS were the mainstay. Regional and up country showed some increased buying but with price and quality sensitive.

ORTHODOX LEAF

Demand: - Fair Demand.

Market: - High grown whole leaf & broken types irregular and easier. Fanning was dearer by Rs 3 to 5. Others sold barely steady to easier however fanning sold steady to dearer.

Buying Pattern: - CIS fair support on cleaner blacker varieties with selective buying from internal buyers. Shippers to Middle East operated on whole leaf grades and broken grades. Internal continued to be subdued.

CTC DUST

DEMAND: - Good demand.

MARKET: - CTC dust offer this week was at 361,573.50Kgs of which 337,446.32kgs were sold (93.33%). Best category dust sold barely steady to easier with few lots remaining unsold. Good and better medium teas sold dearer following quality especially the finer dust in the better medium teas fetched some handsome gains. Medium & plainer teas sold Rs 2 to 4 dearer.

BUYING PATTERN: - Regional and local packers were selective on the best & good teas. Middle East continued to be active on blacker sorts with selective buying from Russia. Other up country buyers were continued to be selective.

ORTHODOX DUST

DEMAND: - Continued selective demand.

MARKET: - High grown primary dust sold steady with few lots remaining unsold. Medium grown teas sold barely steady. Secondary's sold firm.

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

Courtesy - J Thomas & Company Private Limited

KOLKATA AUCTION

09TH SEPTEMBER 2025 (SALE NO.37)

	2025	2024	DIFFERENCE
CTC	1,06,696	65,193	41,503
ORTHODOX	69,774	45,122	24,652
DUST	56,220	34,684	21,536

KOLKATA SALE CTC MARKET

MARKET REPORT:

Market opened to good demand. Liquoring Assams selling readily around last levels.

Mediums and plainer Dooars seen so far irregular around last.

BUYING PATTERN:

Western India: Supporting the better teas on offer

HUL: Good support

Teloijan: Operating on the mediums primarily

Exporters: Operating

Other Internal/Local: Fair support KOLKATA SALE ORTHODOX MARKET

MARKET REPORT:

Market opened to strong demand. Nominal quantity of tippy teas on offer sold readily. Well made Whole Leaf and Brokens firm around last. Remainder

Whole Leaf and Brokens irregular around last. Few Fannings and

Secondaries selling around last levels.

BUYING PATTERN:
Middle East: Active
CIS: Operating
HUL/TCPL: Selective
KOLKATA SALE DUST MARKET

MARKET REPORT:

Market opened to good demand. All sorts easier. Fibrous secondaries witnessing limited demand and facing withdrawals.

BUYING PATTERN: HUL: Operating Teloijan: Active

Western India: Operating

Courtesy - J Thomas & Company Private Limited

COCHIN AUCTION

10TH SEPTEMBER 2025 (SALE NO.37)

QUANTITY	2025 kgs	2024 kgs	Difference 25,287 (36,814)	
ORX	1,97,833	1,72,546		
CTC	25,205	62,019		
TOTAL	2,23,038	2,34,565	(11,527)	

Market Report - Orthodox Teas

The Orthodox sale witnessed fair overall demand.

Liquoring lines with brighter appearance attracted consistent competition, while plainer and medium varieties saw selective interest. A few lots failed to find buyers, primarily due to reserve levels being above market acceptance or lack of demand for that style.

Withdrawals were mainly confined to plainer and medium lines where reserve prices were above trade levels, reflecting selective buyer interest, with exporters and blenders choosing only better-made teas. The unsold position underscores a cautious approach from buyers in lower-end categories. Overall, the market showed a steady undertone. Liquoring Orthodox grades remained the focus of demand led by the ME channel, while the CIS shippers provided fair support. Plainer teas struggled, leading to isolated withdrawals, but quality lines continued to fetch firm to dearer levels. Market Report - CTC Teas

The CTC market showed a generally steady to firm trend.

There was selective improvement in demand for well-made liquoring lines which were well absorbed. Plainer and medium sorts witnessed fair absorption at easier rates, while certain marks faced resistance, resulting in a few withdrawals.

Courtesy - J.T. COCHIN

SILIGURI AUCTION

10TH SEPTEMBER 2025

	2025-2026	2024-2025	DIFFERENCE 32,984	
CTC	169,763	136,779		
DARJEELING		-	:50	
GREEN	-	1-11	180	
DUST	19,548	16,300	3,248	
TOTAL	189,311	153,079	36,232	

STAC OFFERINGS IN PACKAGES (SALE NO 37)

DEMAND / MARKET DETAILS: Market opened to good demand. Good and Best sorts are irregular around last. Medium teas easier following quality. Plainer varieties selling around last.

BUYING PATTERN:

Internal/Local Packeteers: Mainstay

TCPL/HUL: Operating WI: Operating

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

MALAWI AUCTION

10TH SEPTEMBER 2025 (SALE NO.37)

There was less and selective interest for the 3380 packages on offer.

BP1 - Single invoice on offer fetched 5USC up on last.

PF1 - Selected invoices sold up to 8USC below valuation, balance were taken out.

PD/ were not supported.

 ${\it PF1SC-Single\ invoice\ on\ offer\ sold\ 11USC\ below\ valuation.}$

D1 - N/A

Secondary fngs held firm on last, respective dusts neglected.

Courtesy- TEA BROKERS CENTRAL AFRICA LIMITED

GUWAHATI AUCTION 10TH SEPTEMBER 2025 (SALE NO.37)

Guwahati Opening CTC Market Report

Market:

Good demand for the good and better medium Assams at steady to occasionally dearer rates. Fair demand for the remainder at steady to easier rates following quality and with some withdrawals.

(ETB- 57%, PTM running at 85%)

Buying Pattern:

HUL / Western India / North India / other packeteers / Exporters operating.

Courtesy - ASSOCIATED BROKERS PVT. LTD



TEA SALE ARRANGEMENTS FOR THE FOURTH QUARTER OF 2025 OCTOBER/NOVEMBER/DECEMBER

Sale No.	No. Closing Dates		Prompt Dates		10% Payment	E-Platform Levy Prompt Dates			
		Ex-Estate & Main Sale	Buyers	Sellers		Buyers	Sellers		
	OCTOBER 2025								
39	Tue 07th & Wed 08th	18/09/2025 at 4.30 p.m.	14-Oct-2025	15-Oct-2025	10-Oct-2025	14-Oct-2025	16-Oct-2025		
40	Tue 14 th & Wed 15 th	25/09/2025 at 4.30 p.m.	21-Oct-2025	22-Oct-2025	17-Oct-2025	21-Oct-2025	23-Oct-2025		
41	Tue 21st & Wed 22nd	02/10/2025 at 4.30 p.m.	28-Oct-2025	29-Oct-2025	24-Oct-2025	28-Oct-2025	30-Oct-2025		
42	Tue 28 th & Wed 29 th	09/10/2025 at 4.30 p.m.	04-Nov-2025	06-Nov-2025	31-Oct-2025	04-Nov-2025	07-Nov-2025		
	NOVEMBER 2025								
43	Mon 03 rd & Tue 04 th	16/10/2025 at 4.30 p.m.	10-Nov-2025	11-Nov-2025	07-Nov-2025	10-Nov-2025	12-Nov-2025		
44	Tue 11 th & Wed 12 th	23/10/2025 at 4.30 p.m.	18-Nov-2025	19-Nov-2025	14-Nov-2025	18-Nov-2025	20-Nov-2025		
45	Tue 18th & Wed 19th	30/10/2025 at 4.30 p.m.	25-Nov-2025	26-Nov-2025	21-Nov-2025	25-Nov-2025	27-Nov-2025		
46	Tue 25th & Wed 26th	07/11/2025 at 4.30 p.m.	02-Dec-2025	03-Dec-2025	28-Nov-2025	02-Dec-2025	05-Dec-2025		
	DECEMBER 2025								
47	Mon 1st & Tue 02nd	13/11/2025 at 4.30 p.m.	08-Dec-2025	09-Dec-2025	05-Dec-2025	08-Dec-2025	10-Dec-2025		
48	Tue 09th & Wed 10th	20/11/2025 at 4.30 p.m.	16-Dec-2025	17-Dec-2025	12-Dec-2025	16-Dec-2025	18-Dec-2025		
49	Mon 15 th & Tue 16 th	27/11/2025 at 4.30 p.m.	22-Dec-2025	23-Dec-2025	19-Dec-2025	22-Dec-2025	29-Dec-2025		
50	Mon 22 nd	05/12/2025 at 4.30 p.m.	29-Dec-2025	30-Dec-2025	29-Dec-2025	29-Dec-2025	02-Jan-2026		

HOLIDAYS FOR THE FOURTH QUARTER OF 2025

Monday, 06th October - Vap Full Moon Poya Day

Monday, 20th October - Deepavali Festival Day

Wednesday, 05th November - Ill Full Moon Poya Day

Thursday, 04th December - Unduvap Full Moon Poya Day

Thursday, 25^{th} December – Christmas Day

