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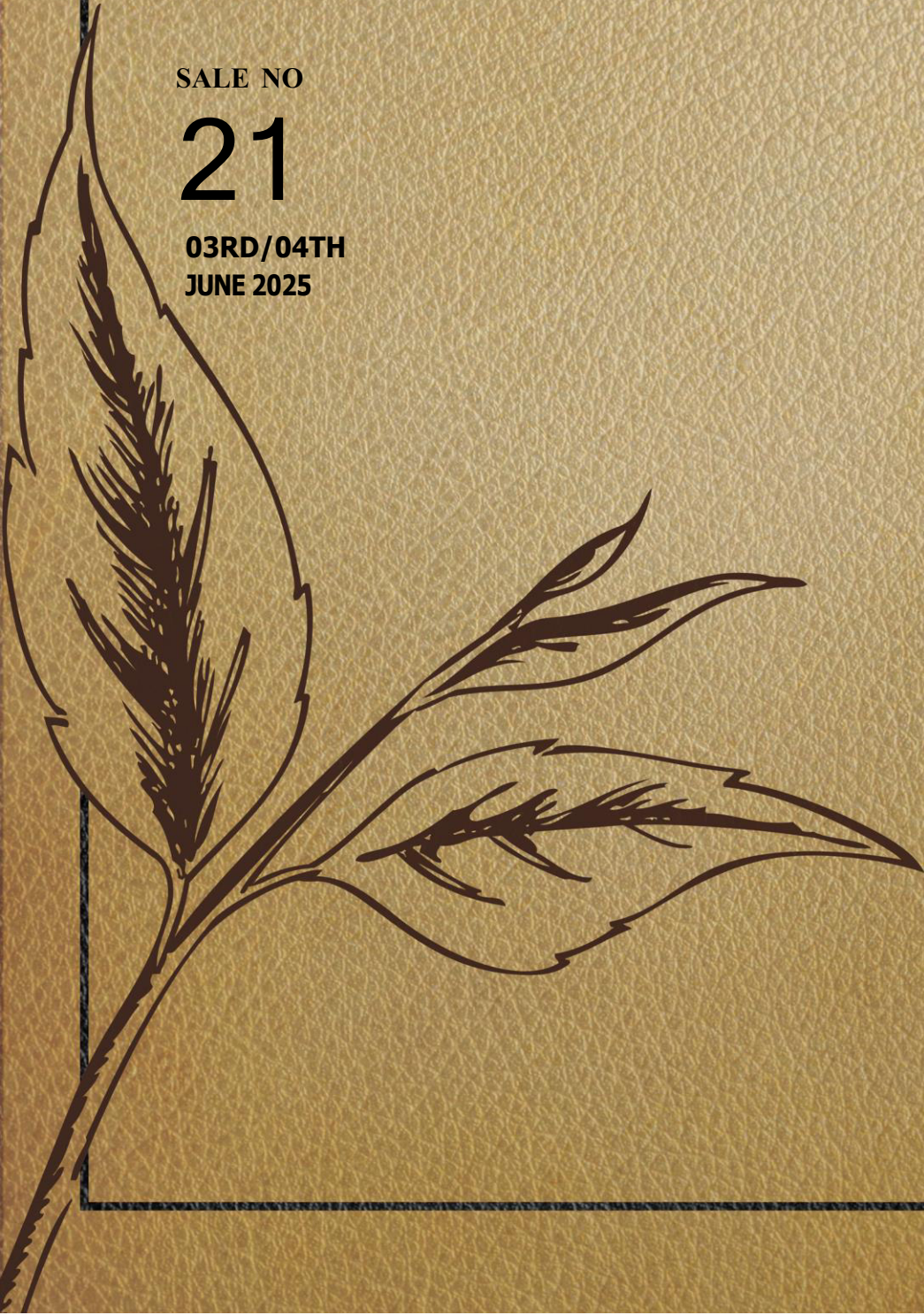
FORBES & WALKER TEA BROKERS PVT LTD

WEEKLY TEA MARKET REPORT

SALE NO

21

**03RD/04TH
JUNE 2025**



Overall Market

	QTY (M/KGS)	DEMAND
Ex Estate	0.91	Weak
High & Medium	0.90	Less
Leafy	0.82	Fair
Semi Leafy	0.70	Fair
Tippy/Small Leaf	0.94	Fair
Premium Flowery	0.05	Fair
Off Grade	1.65	Irregular
Dust	0.75	Irregular
Total	6.72	Fair General

ORDER OF SALE

SALE NO : 21

03RD/04TH JUNE 2025

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

AUCTION DETAILS

AT THIS WEEK'S SALE 12,400 LOTS TOTALLING 6,716,104 KGS WERE ON OFFER. THE BREAKDOWN IS AS FOLLOWS:

	LOTS	QUANTITY
Ex Estate	857	908,776
Main Sale - High & Medium	1,938	898,013
Low Grown - Leafy	1,935	818,253
Low Grown - Semi Leafy	1,599	697,935
Low Grown - Tippy	1,968	943,437
Premium Flowery	310	51,812
Off Grades	3,011	1,647,851
Dust	782	750,027
Total	12,400	6,716,104
Re - Prints	1,108	565,319

SETTLEMENT DATES

06/06/2025 11/06/2025 12/06/2025

10% Payment

Buyers Prompt

Sellers Prompt

Quality

High & Mid Grown were barely maintained, whilst the Low Grown were lower to last.

COMMENTS

Overall Auction offerings were maintained around 6.7 M/Kgs. Large Leaf/Low Grown type teas continued to witness a somewhat firm market, whilst the High & Mid Grown liquoring Small Leaf teas continued to encounter a bearish market sentiment.

Ex-Estate offerings totalled 0.9 M/Kgs, marginally lower from the 1.0 M/Kgs on offer the previous week. Marginal improvement in quality though market sentiment still continued weak.

A selection of the Better Westerns' were firm and dearer, whilst the others were barely maintained. Marginal improvement in the price of teas at the lower end of the market, particularly for the cleaner sorts. Demand for Nuwara Eliyas' continued sluggish with only a few select invoices realising a reasonable price in keeping with the overall market. Uva/Uda Pussellawa BOP/BOPF's were barely maintained with a few select clean leaf teas gaining marginally in value.

High & Mid Grown CTC teas showed no significant change in its overall price structure, whilst the Low Grown types gained by Rs. 20-40 per kg for the better teas and that too, particularly for the PF1 grade.

Less demand from shippers to the UK and the continent. Fair activity from shippers to Japan, the CIS and the Middle Eastern sector, whilst there was selective buying from South Africa and perhaps China.

The current crop intake in most plantations record a decline which is likely to show up in the auction availability perhaps in the next 2 to 3 weeks.

Low Grown's comprised of 2.5 M/Kgs. All categories met with fair demand.

In the Leafy and Semi-Leafy catalogues, Select Best and Best BOP1's maintained at firm levels, whilst the balance were irregular following quality. OP1's were generally easier. Well-made OP's and the Below Best varieties maintained, whilst the others declined. OPA's were mostly lower. PEK's held firm, whilst the high-priced PEK1's were easier. Balance sold around last levels.

In the Tippy catalogue, well-made FBOP's were firm to dearer, whilst the balance were irregular following quality. A few Select Best FBOPF1's appreciated, whilst the balance were firm.

In the Premium catalogue, Very Tippy teas met with good demand and were dearer. Best and Below Best varieties too followed a similar trend, whilst teas at the lower end teas were easier.

NOTE

Next week's Auction (Sale No. 22) is scheduled for Monday, 9 June and Wednesday, 11 June 2025

NATIONAL TEA SALES AVERAGES

(MAY 2025)



Key Highlights:

- Total Elevation Average declined by Rs. 15.43 in comparison to the previous month
- Cumulative variance recorded a negative Rs. 115.48 and USD 0.38 against January-May 2024
- Low Grown Elevation recorded a gain in LKR and USD terms month on month, whilst the High & Mid Grown elevations declined in both rupee and USD terms vis-a-vis April 2025
- Cumulatively, all elevations witnessed a decline both in LKR and USD terms in comparison with the corresponding year

In Sri Lankan Rupees								
	25-May	25-Apr	MOM Variance	24-May	YOY Variance	To date 2025	To date 2024	YOY Variance
High Grown	1,038.64	1,101.21	-62.57	1,162.31	-123.67	1,097.04	1,157.41	-60.37
Medium Grown	1,024.08	1,058.03	-33.95	1,074.79	-50.71	1,040.40	1,101.12	-60.72
Low Grown	1,240.70	1,228.65	12.05	1,367.80	-127.10	1,237.54	1,363.55	-126.01
Total	1,151.32	1,166.75	-15.43	1,266.80	-115.48	1,170.73	1,270.21	-99.48
In U.S. Dollars								
	25-May	25-Apr	MOM Variance	24-May	YOY Variance	To date 2025	To date 2024	YOY Variance
High Grown	3.49	3.69	-0.20	3.90	(0.41)	3.71	3.79	-0.07
Medium Grown	3.44	3.54	-0.10	3.61	(0.17)	3.52	3.60	-0.08
Low Grown	4.17	4.12	0.05	4.59	(0.42)	4.19	4.46	-0.27
Total	3.87	3.91	-0.04	4.25	(0.38)	3.96	4.15	-0.19

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

- * National tea sales average for the month of May 2025 recorded Rs. 1,151.32 (USD 3.87), recording a decline of Rs. 15.43 (USD 0.04) in comparison with the April 2025 average of Rs. 1,166.75 (USD 3.91).
- * In comparison to the May 2024 average of Rs. 1,266.80 (USD 4.25), shows a decline of Rs. 115.48 (USD 0.38) YOY.
- * Total National Sale Average for the year 2025 (to-date) was recorded at Rs. 1,170.73 (USD 3.96), a decline of Rs. 99.48 (0.19) against the corresponding year's average of Rs. 1,270.21 (USD 4.15).

Elevation-Wise Analysis - May 2025:

- * High Grown average for the month recorded a decrease of Rs. 62.57 and USD 0.20 month on month, whilst a decline of Rs. 123.67 and USD 0.41 was witnessed against the corresponding to-date period in the year 2024.
- * Medium Grown average for the month recorded a decline of Rs. 33.95 and USD 0.10 month on month. In comparison to the corresponding cumulative average last year, shows a decrease of Rs. 50.71 and USD 0.17.
- * Low Grown average for the month recorded an increase of Rs. 12.05 and USD 0.05 month on month, whilst the YOY average shows a decrease of Rs. 127.10 and USD 0.42 vis-à-vis the corresponding period in 2024.
- * All regions recorded negative variances during the period January-May 2025 in comparison to the cumulative corresponding period of 2024 both in LKR and USD terms.

(Refer statistical details on Page Nos. 13)

Kenyan tea exports fell by 20% in 1Q 2025

Revenue from Kenya's tea exports fell by 20 percent in the first quarter (Q1) of 2025 due to lower shipment volumes. The country earned 46.07 billion Kenyan shillings (about 356 million U.S. dollars) between January and March, down from 446 million dollars in the same period last year.

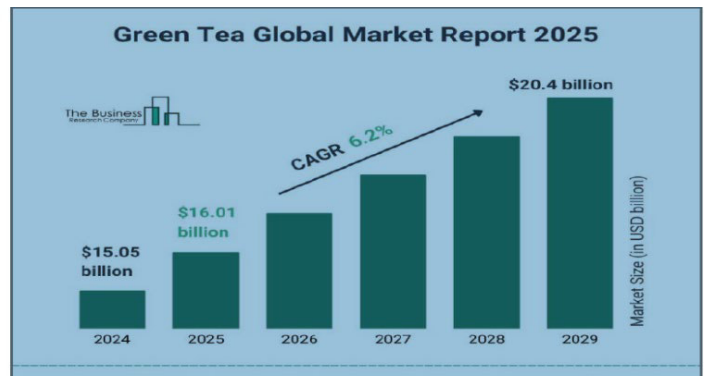
Export volumes declined to 157,514 tons in the quarter, down from 169,830 tons a year earlier, a 7.3 percent drop attributed to reduced production following a prolonged dry spell.

The three months were characterized by unusually dry weather. This had a significant impact on tea production, mainly in February, with output falling by 21 percent in the east of the Rift and 18.6 percent in the west.

Kenya is seeking to expand its tea export markets beyond traditional destinations such as Pakistan, the United Kingdom, Russia, and Chad.

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

Green Tea Market hits \$ 16 Billion in 2025



The global green tea market just leapt by an astonishing USD 1 billion in growth year-over-year, reaching new heights in 2025 to USD \$16.01 billion and predicts a trajectory that shows no signs of slowing, with the market expected to reach USD 29.2 billion by 2033, growing at a CAGR of 5.56% from 2025 to 2033.

It's more than just health hype. Consumers are shifting from sugary beverages to functional, plant-based hydration. Green tea, rich in catechins, L-theanine, and natural polyphenols, has emerged as the wellness worlds' quiet champion, touted for antioxidants properties, weight control support, and a connection to longevity. And it is not just Western consumers driving demand. Asia's premium tea segment is booming, with a surge in export interest from wellness brands, boutique retailers are looking for the next-generation beverages.

With global demand surging, the competition for quality green tea is reaching an all-time high. The largest producer of green tea globally is China, followed by Japan, Vietnam, Indonesia, and India are now in a race to position themselves as the world's top green tea origin in quality, and only a handful will make the cut

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

CROP AND WEATHER

FOR THE PERIOD 28 May - 03 June 2025

Western/Nuwara Eliya Regions



Adverse weather conditions were reported throughout the week in the Western and Nuwara Eliya regions. The Department of Meteorology expects heavy showers in both regions in the week ahead.

Uva/Udapussellawa Regions



The Uva and Uda Pussellawa regions reported bright weather and strong winds throughout the week. According to the Department of Meteorology, rain and strong winds are expected in both regions in the week ahead.

Low Grown



The Low Grown Region reported showers throughout the week. Rain is expected in the Low Grown Region in the week ahead according to the Department of Meteorology.

Crop

The crop intake was maintained in the Nuwara Eliya, Uva, Uda Pussellawa and Low Grown regions, whilst the Western Region reported a decrease.

HIGH GROWN TEAS

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

BOP

Better Western's - A few select clean leaf coloury teas appreciated by Rs. 50-100 per kg, whilst the others were irregular and easier. At the lower end, clean leaf teas were generally firm, whilst the poorer sorts were often irregular and easier. Nuwara Eliya's were difficult of sale. Uva/Uda Pussellawa's - Clean leaf teas were generally firm, whilst the others were Rs. 10-20 per kg easier.

BOPF

Better Western's - A selection of teas gained by Rs. 50-100 per kg following special inquiry, whilst the others were irregular following quality. At the lower end, clean leaf teas were firm and dearer, whilst the others were barely steady. Nuwara Eliya's were difficult of sale. Uva/Uda Pussellawa's were generally firm.

OP/OPA

Well-made varieties declined by Rs. 20-40 per kg, whilst the others and poorer sorts were easier by Rs. 20 per kg.

PEKOE/PEKOE1

Flavoury PEK's declined in demand and were mostly unsold, whilst the Orthodox Leafy PEK's were lower by Rs. 40-60 kg. Best PEK1's were easier by Rs. 60-80 per kg, whilst the others declined by Rs. 40-60 per kg. Best Rotovane PEK's gained by Rs. 20-40 per kg following special inquiry, whilst the others sold around last levels. Below Best and poorer varieties were easier by Rs. 40-50 per kg.

FBOP/FBOPF1

Select Best flavoury FBOP's declined in demand and were mostly unsold. Better Orthodox FBOP's were firm to marginally easier, whilst the FBOPF1's were lower by Rs. 20 per kg and more at times. Below Best FBOP/FBOPF1's were easier by Rs. 40 per kg, whilst the teas at the lower end declined by Rs. 40-60 per kg.

QUOTATIONS LKR

SALE DTE	BOP		BOPF		PEKOE/FBOP		OP	
	27/28 May	03/04 Jun	27/28 May	03/04 Jun	27/28 May	03/04 Jun	27/28 May	03/04 Jun
Best Westerns	1100-1360	1160 - 1360	1140-1380	1180 - 1360	1250-1550	1320 - 1700	1100-1140	1060 - 1180
Below Best Westerns	1000-1080	1020 - 1120	1020-1120	1040 - 1160	1120-1200	1160 - 1260	1040-1080	1020 - 1040
Plainer Westerns	820 - 980	840 - 1000	800-1000	810 - 1020	900-1100	920 - 1100	980-1020	940 -
Nuwara Eliyas	1200	N/A	1200-1240	N/A	N/A	920 - 1360	1000	940 - 1040
Brighter Udupussellawas	1040-1100	N/A	850 - 870	850 - 880	1220-1380	1260 - 1420	1060	1040 -
Other Udupussellawas	830 - 900	840 - 880	800 - 830	810 - 840	N/A	900 - 1160	940	940 - 980
Best Uvas	1120-1220	1060 - 1160	960-1040	960 -	1300-1650	1320 - 1850	1060-1160	1080 - 1180
Other Uvas	890 - 940	900 -	840 - 900	830 - 920	1000-1220	920 - 1280	980-1040	980 - 1060

MEDIUM GROWN TEAS

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

BOP	Large Leaf teas continued to sell well, whilst the others were barely steady.
BOPF	Better teas were firm, whilst the others declined by Rs. 50 per kg and more.
OP/OPA	Well-made OP/OPA's declined by Rs. 20 per kg, whilst the others at the lower end were easier by Rs. 20 per kg.
PEKOE/PEKOE1	Bold PEK's were lower by Rs. 20-40 per kg, whilst the others were easier by Rs. 40 per kg. A few Select Best PEK1's were selectively dearer following special inquiry, whilst the others were lower by Rs. 60 per kg. Below Best and bottom end types declined by Rs. 40-60 per kg.
FBOP/FBOPF1	A few Select Best and Best FBOP's were lower by Rs. 20 per kg, whilst the others were easier by Rs. 20-40 per kg and more at times. Better FF1's were lower by Rs. 20 per kg, whilst the others in the Best and Below Best categories were easier by Rs. 40 per kg. Teas at the lower end declined by a similar margin.

QUOTATIONS LKR SALE DTE	BOP		BOPF		PEKOE/FBOP		OP	
	27/28 May	03/04 Jun	27/28 May	03/04 Jun	27/28 May	03/04 Jun	27/28 May	03/04 Jun
Good Mediums	1160-1600	1180 - 1750	980-1020	1000 - 1060	1440-1900	1460 - 2200	1060-1180	1080 - 1160
Other Mediums	820-1000	830 - 1020	750 - 940	760 - 940	900-1280	900 - 1360	1000-1040	760 - 1060

UNORTHODOX / CTC TEAS

HIGH GROWN	BP1s - The limited quantum on offer sold well. PF1s - Teas in the higher price bracket were barely steady, whilst the others were irregular.
MEDIUM GROWN	BP1s - Better teas sold well, whilst the others were irregular. PF1s - Teas in the higher price bracket were generally firm, whilst the others were irregular following quality.
LOW GROWN	BP1s - Irregular. PF1s - Better teas were Rs. 20-40 per kg dearer, whilst the others were firm and lower by a similar margin.

QUOTATIONS LKR SALE DTE	BP1		PF1	
	27/28 May	03/04 Jun	27/28 May	03/04 Jun
High Grown	N/A	1220 -	900-1220	940 - 1100
Medium Grown	1120-1200	1220 -	840-1120	870 - 1100
Low Grown	1080	1100 - 1160	1080-1550	1100 - 1460

OFF GRADES

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

FGS1/FGS

Teas in the Best category were easier by Rs. 20-40 per kg. Below Best varieties were lower by Rs. 40-60 per kg. Teas at the lower end of the market were irregularly easier following quality. Low Grown - Clean leaf varieties were firm on last, whilst the balance declined by Rs. 20 per kg. CTC - In general, were firm to easier following quality.

BROKENS

In general, maintained.

BOP1A

Main Grade reducer varieties in the Best category maintained around last week's levels, whilst select invoices gained by Rs. 20-30 per kg following quality. Below Best varieties were firm, whilst the poorer sorts by gained Rs. 10-20 per kg and more, on occasion.

QUOTATIONS LKR

SALE DTE	HIGH		MEDIUM		LOW	
	27/28 May	03/04 Jun	27/28 May	03/04 Jun	27/28 May	03/04 Jun
Better Fannings (Orthodox)	810-1120	790 - 1160	810-930	810 - 880	820-890	810 - - 940
Better Fannings (CTC)	N/A	790 -	810-820	N/A	800-1100	800 - - 1040
Other Fannings (Orthodox)	700-800	650 - 780	670-800	670 - 800	660-810	620 - 800
Other Fannings (CTC)	N/A	N/A	740-770	730 - 780	700-780	650 - 780
Good Brokens	880-1140	870 - 1180	870-1180	860 - 1240	880-1320	870 - - 1320
Other Brokens	750-870	800 - 860	810-860	800 - 850	750-870	720 - 860
Better BOP1As	920-960	920 - 980	920-980	920 - 1200	940-1360	940 - - 1400
Other BOP1As	890-900	860 - 900	880-900	850 - 900	820-920	820 - - 920

DUSTS

DUST1

Select Best Dust1's, where quality was maintained, were dearer by Rs. 20-40 per kg and more at times, whilst the others were irregularly easier. The Best varieties were dearer by Rs. 40-60 per kg, whilst the Below Best types and the poorer sorts declined by Rs. 20-40 per kg. Low Grown varieties were firm. Best High and Mid Grown CTC teas declined by Rs. 20-40 per kg, whilst the Below Best varieties together with the poorer sorts were easier by a similar margin. Best Low Grown CTC teas appreciated by Rs. 40-60 per kg, whilst the others were firm to easier by Rs. 20 per kg.

DUST

Clean leaf secondaries were firm, whilst the poorer sorts were firm to easier by Rs. 20 per kg. The Low Grown varieties were firm.

QUOTATIONS LKR

SALE DTE	HIGH		MEDIUM		LOW	
	27/28 May	03/04 Jun	27/28 May	03/04 Jun	27/28 May	03/04 Jun
Better Primary Dust (Orthodox)	1100-1500	1120 - 1700	960-1040	980 - 1060	950-1320	980 - 1120
Better Primary Dust (CTC) P. Dust	1000-1120	1000 - 1060	1000-1080	1000 - 1160	1050-1320	1100 - 1420
Below Best Primary Dust (Orthodox)	950-1080	960 - 1100	830-950	840 - 960	760-940	770 - 960
Other Primary Dust (CTC) P. Dust	830-980	860 - 980	760-980	780 - 980	690-1040	690 - 1080
Other Primary Dust (Orthodox)	680-940	700 - 950	700-820	670 - 820	690-750	690 - 760
Better Secondary Dust	N/A	900 - 960	800-860	820 - 870	920-1140	940 - 1100
Other Secondary Dust	680-850	660 - 880	670-780	690 - 800	670-900	680 - 920

LOW GROWN TEAS

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

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

QUOTATIONS LKR SALE DTE	SELECT BEST		BEST		BELOW BEST		OTHERS	
	27/28 May	03/04 Jun	27/28 May	03/04 Jun	27/28 May	03/04 Jun	27/28 May	03/04 Jun
FBOP 1	1750-2100	1750 - 2150	1500-1600	1500 - 1600	1300-1350	1300 - 1350	1000-1100	1000 - 1100
FBOP	2100-2400	2150 - 2400	1600-1700	1600 - 1700	1250-1300	1250 - 1350	1000-1100	1000 - 1100
BOP 1	2100-3000	2100 - 3000	1700-2000	1700 - 2000	1000-1360	1100 - 1380	850-980	850 - 1060
BOP	1800-2100	1700 - 2100	1350-1400	1350 - 1420	1000-1300	1100 - 1300	950-1000	950 - 1000
BOPF	1200-1400	1200 - 1450	900-1000	900 - 1000	850-900	850 - 900	800-850	800 - 850
FBOPF (TIPPY)/FBOPF SP	4200-4500	4200 - 4600	3500-4000	3500 - 4000	2400-3250	2400 - 3200	1000	1000 -
FBOPF 1	1600-1700	1650 - 1700	1450-1500	1450 - 1500	1300-1350	1300 - 1350	1000-1100	1000 - 1100
FBOPF	1600-1850	1650 - 1850	1400-1500	1400 - 1500	1250-1350	1200 - 1300	950-1000	900 - 1000
OP 1	2400-3300	2350 - 3250	2250-2350	2200 - 2300	1650-2200	1600 - 2150	900-1600	900 - 1550
OP	1360-1600	1340 - 1550	1240-1340	1220 - 1320	1160-1220	1160 - 1200	920-1140	920 - 1140
OPA	1300-1750	1300 - 1650	1140-1280	1120 - 1280	1040-1120	1020 - 1100	860-1020	860 - 1000
PEKOE	1460-2450	1500 - 2550	1300-1440	1320 - 1480	1180-1280	1180 - 1300	800-1160	800 - 1180
PEK 1	1650-2400	1650 - 2250	1360-1600	1360 - 1600	1260-1340	1260 - 1340	850-1240	850 - 1240

TOP PRICE

WESTERN MEDIUM			
Craighead	BOP	@	1750
Craighead	BOPSp	@	1260
Vellai Oya	BOPF/BOPFSp		1060
Craighead	BOP1	@	2200
Craighead	FBOP/FBOP1	@	2200
Dartry Valley	FBOP/FBOP1	@	1900
Harangalla	FBOP/FBOP1	@	1700
Kenilworth	FBOP/FBOP1		1700
Craighead	FBOPF/FBOPF1	@	1700
Harangalla	FBOPF/FBOPF1	@	1600
Dartry Valley	FBOPF/FBOPF1	@	1600
Ancoombra	FBOPF/FBOPF1		1600
Imboolpittia	FBOPF/FBOPF1	@	1480
Orange Field	FBOPF/FBOPF1		1480
Dartry Valley	OP/OPA	@	1260
Dartry Valley	OP1	@	1600
Dartry Valley	PEK/PEK1	@	1700
WESTERN HIGH			
Inverness	BOP		1360
Wattegodde	BOP	@	1320
Somerset	BOP	@	1300
Great Western	BOPSp	@	1600
Wanarajah	BOPSp	@	1460
Great Western	BOPF/BOPFSp	@	1360
Wattegodde	BOPF/BOPFSp		1360
Robgill	BOPF/BOPFSp		1360
Alton	BOPF/BOPFSp	@	1300
Glenloch	BOP1	@	1500
Fairlawn	FBOP/FBOP1		1700
Torrington	FBOP/FBOP1	@	1650
Fairlawn	FBOPF/FBOPF1		1550
Venture	OP/OPA		1180
Kirkoswald	OP/OPA	@	1120
Glenloch	OP/OPA	@	1100
Bambarakelly	OP/OPA	@	1100
Bogahawatte	OP/OPA		1100
Glenloch	OP1	@	1550
Torrington	OP1	@	1420
Fairlawn	PEK/PEK1		1550
Bogahawatte	PEK/PEK1		1550
NUWARA ELIYAS			
Lovers Leap	BOPSp		1040
Court Lodge	BOPF/BOPFSp	@	800
Kenmare	FBOP/FBOP1	@	1360
Court Lodge	OP/OPA	@	1080
Lovers Leap	PEK/PEK1		1000
UDAPUSSELLAWAS			
High Forest	BOP		880
Kirklees	BOPSp		890
Mooloya	BOPF/BOPFSp		880

UDAPUSSELLAWAS			
Blairlomond	BOP1	@	1550
Blairlomond	FBOP/FBOP1	@	1440
Delmar	FBOPF/FBOPF1	@	1340
Blairlomond	OP/OPA	@	1160
Maha Uva	OP/OPA	@	1100
Delmar	OP/OPA	@	1040
Delmar	OP1	@	1420
Blairlomond	OP1	@	1300
Blairlomond	PEK/PEK1	@	1460
LOW GROWNS			
Lions	BOP		2300
Lellopitiya Super	BOPSp		1900
Sithaka	BOPF		1650
Chandrika Estate	BOPF	@	1260
Rajjuruwatta Super	BOPFSp		2300
Palmgarden	BOPFSp	@	1550
Sithaka	FBOP		2600
Adams View	FBOP	@	2450
Pothotuwa	FBOP	@	2400
Lumbini	FBOP1		2250
Gunawardena	FBOP1	@	2200
Dullie Ella	FBOP1	@	2150
Stream Line	FBOPF		2450
New Laksakanda	FBOPF		1950
Gunawardena	FBOPF	@	1850
Pothotuwa	FBOPF1	@	1750
Wilehena	FBOPF1		1700
Dellawa	FBOPF1	@	1650
Gunawardena	FBOPF1	@	1650
New hopewell	FBOPF1	@	1650
Gangaboda	FBOPF1	@	1650
Fourtune	FBOPF1	@	1650
Pothotuwa	BOP1	@	3000
Dampahala	OP1		3250
Pothotuwa	OP1	@	2850
Kiruwanaganga	OP1	@	2800
Gunawardena	OP1		2800
Bogoda Group	OP		1550
Captain Garden	OP		1550
Nilgiri	OP		1550
Miriswatta	OP		1550
Liyonta	OPA		1650
Lumbini	PEK		2550
Hidellana	PEK1		2250
Mulatiyana Hills	PEK1		2250
Dampahala	PEK1		2250

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

UVA MEDIUM			
Halpewatte Uva	BOP	@	1320
Tinioya	BOP		1320
Hindagala	BOPSp		1380
Dickwella	BOPF/BOPFSp		1460
Ury	BOP1		1600
Sarnia Plaiderie	FBOP/FBOP1	@	1700
Shawlands	FBOP/FBOP1	@	1650
Telbedde	FBOP/FBOP1		1650
Dickwella	FBOP/FBOP1	@	1600
Ury	FBOP/FBOP1		1600
Roseland Uva	FBOP/FBOP1		1600
Dickwella	FBOPF/FBOPF1	@	1500
Sarnia Plaiderie	FBOPF/FBOPF1	@	1500
Dickwella	OP/OPA	@	1180
Misty-Uva	OP/OPA	@	1180
Glen Alpin	OP/OPA		1180
Shawlands	OP/OPA	@	1140
Hindagala	OP/OPA		1140
Sarnia Plaiderie	OP/OPA	@	1120
Telbedde	OP/OPA	@	1120
Kinellan	OP/OPA		1120
Wewesse	OP/OPA		1120
Hindagala	OP1		1550
Dickwella	OP1	@	1500
Uva Samovar	OP1	@	1500
Halpewatte Uva	OP1	@	1460
Sarnia Plaiderie	OP1		1460
Wewesse	OP1		1460
Ury	OP1		1460
Sarnia Plaiderie	PEK/PEK1	@	1650
UVA HIGH			
Uvakellie	BOP		1180
Gonamotawa	BOPSp	@	1320
Ranaya	BOPF/BOPFSp		1000
Bandaraeliya	BOPF/BOPFSp	@	960
Kelliebedde	BOPF/BOPFSp	@	920
Ellathota Uva	BOP1	@	1550
Glenanore	BOP1	@	1480
Uva Highlands	BOP1		1480
UVA HIGH			
Gonamotawa	FBOP/FBOP1	@	1850
Gonamotawa	FBOPF/FBOPF1	@	1440
Mount Uva	FBOPF/FBOPF1		1440
Glenanore	FBOPF/FBOPF1	@	1420
Ranaya	OP/OPA		1180
Ranaya	OP1		1600
Gonamotawa	OP1	@	1550
Ellathota Uva	OP1	@	1550
Gonamotawa	PEK/PEK1	@	1650
UNORTHODOX HIGH			
Ulugedara CTC	PF1		1100
Dunsinane CTC	BP1		1220
Mount Vernon CTC	BPS		850
UNORTHODOX MEDIUM			
New Peacock CTC	PF1		1100
Rothschild CTC	PF1		1100
New Peacock CTC	BP1		1220
Aultmore CTC	BPS		760
UNORTHODOX LOW			
Hingalgoda CTC	PF1		1550
Ceciliyan CTC	BP1		1160
Ross Feld CTC	BPS		740
PREMIUM FLOWERY			
Lumbini	FBOPFSp		4350
New Falcon Lanka	FBOPFExSp		4800
Kamarangapitiya	FBOPFExSp1	@	4600
DUSTS			
Great Western	PD		1700
Hingalgoda CTC	PD		1420
OFF GRADES			
Clydesdale	FGS/FGS1	@	1160
Liyonta CTC	PF		1040
Wilehena	BM		1240
Gunawardena	BM	@	1160
Chandrika Estate	BM	@	1140
Kosgahadola Ella	BM	@	1140
Bogoda	BM		1140
Arbour Valley	BP		1320
Ransegoda	BP		1300
Subhagya	BP	@	1280
Renukanda	BP		1280
Aldora	BOP1A	@	1400
Chandrika Estate	BOP1A		1400

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

QUANTITY SOLD

DURING THE PERIOD 26TH-31ST MAY 2025	WEEKLY (KGS)		TODATE (KGS)	
	2025	2024	2025	2024
PRIVATE SALES	250,979	98,623	4,569,202	2,326,700
PUBLIC AUCTION	5,698,830	5,738,117	99,083,108	93,420,131
FORWARD CONTRACTS	51,040	61,280	1,200,911	650,220
DIRECT SALES	NIL	NIL	NIL	NIL
TOTAL	6,000,849	5,898,020	104,853,221	96,397,051
BMF EXCLUDED FROM PRIVATE SALE	17,200	44,878	803,384	984,594

(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
21ST MAY 2025	6.14	5.06	5.89	1153.35	1319.02	1067.57	3.90	4.45	3.53
28TH MAY 2025	5.69	5.74	5.79	1166.92	1284.42	980.70	3.95	4.36	3.28

Source: Central Bank of Sri Lanka / Buying Rates

RATES OF EXCHANGE

SRI LANKA RUPEE APPROX PER UNIT OF CURRENCY

YEAR	2025	2024	2023
USD	295.37	296.83	290.67
STG.PD	398	377.09	358.17
EURO	335.68	320.22	309.96
YEN	2.05	1.87	2.06

Source: Central Bank of Sri Lanka / Buying Rates

PUBLIC AUCTION/GROSS SALES AVERAGE

SALE NO 20 27TH/ 28TH MAY 2025	WEEKLY(LKR)			TODATE (LKR)			WEEKLY(USD)			TODATE(USD)		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
Uva High Grown	1000.61	1117.98	839.51	1050.03	1119.31	1130.04	3.39	3.79	2.81	3.55	3.66	3.35
Western High Grown	994.86	1187.01	922.70	1120.06	1202.37	1328.72	3.37	4.02	3.08	3.79	3.93	3.93
CTC High Grown	1008.35	1096.83	869.02	1084.58	1129.20	1168.11	3.41	3.72	2.90	3.67	3.69	3.46
High Grown (Summary)	996.93	1159.32	894.83	1098.24	1176.98	1270.90	3.37	3.93	2.99	3.72	3.85	3.76
Uva Medium Grown	1073.59	1150.05	874.54	1090.66	1158.85	1123.30	3.63	3.90	2.92	3.69	3.79	3.33
Western Medium Grown	990.13	1043.50	844.84	1028.99	1093.08	1106.97	3.35	3.54	2.82	3.48	3.57	3.28
CTC Medium Grown	928.26	999.46	810.76	955.22	972.93	1063.92	3.14	3.39	2.71	3.23	3.18	3.15
Medium Grown (Summary)	1018.82	1085.97	855.05	1048.47	1114.56	1112.09	3.45	3.68	2.86	3.55	3.64	3.29
Orthodox Low Grown	1285.21	1410.10	1065.69	1269.95	1405.33	1394.47	4.35	4.78	3.56	4.30	4.60	4.13
CTC Low Grown	967.59	1014.20	854.21	984.16	1035.39	1005.42	3.28	3.44	2.86	3.33	3.39	2.98
Low Grown(Summary)	1265.66	1384.74	1054.04	1256.40	1379.86	1372.81	4.28	4.70	3.52	4.25	4.51	4.06
Total	1166.92	1284.42	980.70	1188.60	1292.27	1310.17	3.95	4.36	3.28	4.02	4.23	3.88

Source: Oanda Exchange Rates

Source: MSL - Averages

NATIONAL TEA SALE AVERAGES MONTH OF MAY 2025

	MONTH(LKR)			TODATE (LKR)			MONTH(USD)			TODATE(USD)		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
Uva High Grown	1028.97	1126.17	935.56	1059.89	1119.20	1117.78	3.44	3.76	3.02	3.56	3.64	3.32
Western High Grown	1037.91	1206.00	1028.18	1130.78	1208.57	1312.77	3.47	4.02	3.31	3.80	3.93	3.89
CTC High Grown	1019.85	1124.33	922.71	1085.48	1129.39	1153.33	3.41	3.75	2.97	3.65	3.67	3.42
High Grown (Summary)	1038.64	1162.31	996.79	1097.04	1157.41	1240.79	3.47	3.88	3.21	3.69	3.76	3.68
Uva Medium Grown	1077.86	1144.52	938.67	1091.26	1149.84	1097.56	3.60	3.82	3.03	3.67	3.74	3.26
Western Medium Grown	1008.05	1043.92	904.71	1028.93	1093.69	1089.75	3.37	3.48	2.92	3.46	3.55	3.23
CTC Medium Grown	921.32	975.88	857.69	952.92	968.09	1037.65	3.08	3.26	2.77	3.20	3.15	3.08
Medium Grown (Summary)	1024.08	1074.79	924.84	1040.40	1101.12	1106.48	3.42	3.59	2.98	3.50	3.58	3.28
Orthodox Low Grown	1272.94	1412.74	1141.24	1273.27	1408.07	1381.03	4.25	4.71	3.68	4.28	4.58	4.10
CTC Low Grown	1007.52	1005.82	912.70	981.77	1032.43	999.73	3.37	3.36	2.94	3.30	3.36	2.97
Low Grown(Summary)	1240.70	1367.80	1120.52	1237.54	1363.55	1345.20	4.14	4.56	3.61	4.16	4.43	3.99
Total	1151.32	1266.80	1055.45	1170.73	1270.21	1283.34	3.85	4.23	3.40	3.94	4.13	3.81

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
Apr								
Sri Lanka	25.2	21.5	26.4	84.8	79.8	88.4	-5	8.6

	2023	2024	2025	TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
Mar								
Kenya	30.5	54.3	37.9	118.1	168.8	136.9	50.7	-31.9
Malawi	6.5	7.3	6.1	19.1	20.8	18.2	1.7	-2.6
North India	65.8	46.9	49.4	69	49.2	60.4	-19.8	11.2
South India	13.8	16.9	15.7	40.8	48.9	47.5	8.1	-1.4

	2023	2024	2025	TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
Feb								
Bangladesh	0.05	0.04	0.02	0.41	0.22	0.33	-0.19	0.11

DETAILS OF AWAITING SALE

SALE NO : 22

Scheduled for 09TH/11TH JUNE 2025

	LOTS	QUANTITY
ExEstate	920	961,447
High & Medium	2,079	989,951
Leafy	2,354	970,414
Semi Leafy	1,589	700,371
Tippy	1,945	945,165
Premium Flowery	349	56,923
OffGrades	2,392	1,294,087
Dust	750	747,178
Total	12,378	6,665,536
RePrint	1,203	692,095

17/06/2025

Buyers Prompt

18/06/2025

Sellers Prompt

This sale last year
Sale No. 22 | 04TH/05TH JUNE 2024

Lots :11,760
Re-print Lots :515
Quantity :6,220,049 kgs
Re-print Quantity :241,269 kgs

LOW GROWN CATALOGUES

Violations Excluded

22/05/2025

LEAFY
Closed

SEMI-LEAFY
Closed

TIPPY
Closed

OTHER MAIN SALE CATALOGUES

22/05/2025

HIGH & MEDIUM
Closed

PREMIUM FLOWERY
Closed

OFF GRADES
Closed

NO .OF PKGS

178,883

CTC

10,158 Pkgs - 549,861 kgs

ORDER OF SALE

Approx Selling time of
F&W Catalogues

09TH

JUNE 2025

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

11.30am	Semi - Leafy Teas
2.30pm	Low Grown - Leafy Teas
2.30pm	Low Grown - Tippy Teas
4.30pm	Premium Flowery
5.00pm	Main Sale - High & Medium

11TH

JUNE 2025

9.00am	BOP1A
10.30am	Ex-Estate
10.30am	Off Grade
3.30pm	Dust

BC - Bartleet Produce Marketing (Pvt) Ltd FW - Forbes & Walker Tea Brokers (Pvt) Ltd

LC - Lanka Commodity Brokers Ltd AS - Asia Siyaka Commodities PLC

EB - Eastern Brokers Ltd JK - John Keells PLC

CTB - Ceylon Tea Brokers PLC MB - Mercantile Produce Brokers (Pvt)Ltd

DETAILS OF AWAITING SALE

SALE NO : 23

Scheduled for 17TH/18TH JUNE 2025

	LOTS	QUANTITY
ExEstate	875	912,773
High & Medium	1,870	907,059
Leafy	2,163	907,969
Semi Leafy	1,713	773,403
Tippy	2,225	1,080,468
Premium Flowery	440	69,184
OffGrades	2,483	1,347,882
Dust	650	621,221
Total	12,419	6,619,959
RePrint	869	454,148

24/06/2025

Buyers Prompt

25/06/2025

Sellers Prompt

This sale last year
Sale No. 23 | 11TH/12TH JUNE 2024

Lots	:10,236
Re-print Lots	:862
Quantity	:5,322,138 kgs
Re-print Quantity	:425,449 kgs

LOW GROWN CATALOGUES

Violations Excluded

29/05/2025

LEAFY	SEMI-LEAFY	TIPPY
Closed	Closed	Closed

OTHER MAIN SALE CATALOGUES

29/05/2025

HIGH & MEDIUM	PREMIUM FLOWERY	OFF GRADES
Closed	Closed	Closed

NO .OF PKGS

178,183

CTC

10,055 Pkgs - 543,989 kgs

CATALOGUE CLOSURE DETAILS

17/18

JUNE 2025

Sale No. 23

The Ex-Estate catalogue closed on 29th May 2025, excluding violations. The Main Sale catalogues too closed on 29th May 2025, excluding violations.

24/25

JUNE 2025

Sale No. 24

The Ex-Estate and Main Sale catalogues are scheduled to close on 05th June 2025.

01/02

JULY 2025

Sale No. 25

The Ex-Estate and Main Sale catalogues are scheduled to close on 12th June 2025.

TEA MARKETS AROUND THE WORLD

MOMBASA AUCTION

26TH AND 27TH MAY 2025 (SALE NO.21)

Fair general demand prevailed for the 213,819 packages (14,533,510.50 kilos) available in the market with 26.84% remaining unsold.

MARKETS

Pakistan Packers maintained good enquiry with Yemen and other Middle Eastern countries active but at lower levels. There was strong support from Kazakhstan and other CIS states with maintained activity from Bazaar and Afghanistan. UK were active but selective while Egyptian Packers showed more interest. Russia improved participation while Sudan remained absent. South Sudan were less active with Local Packers showing interest based on price. Somalia maintained enquiry at the lower end of the market.

OFFERINGS

Leaf Grades - 113,440 packages (7,451,852.00 kilos) - 30.02% unsold.

Dust Grades - 80,280 packages (6,018,045.00 kilos) - 24.84% unsold.

Secondary Grades - 20,099 packages (1,063,613.50 kilos) - 16.92% unsold.

LEAF GRADES (M2 & M3)

BP1:

Best - Firm to mostly dearer by up to USC46 but some lines shed up to USC30.

Brighter - Irregularly gained up to USC44 with some teas discounted by up to USC15.

Mediums - KTDA mediums mostly appreciated by up to USC50 but a few lines lost up to USC17 with plantation mediums steady to USC12 above previous rates. Lower Medium - Saw irregular interest and ranged between firm to mostly dearer by up to USC26 to easier by up to USC5.

Plainer - Were steady to USC6 dearer to easier by up to USC2.

PF1:

Best - Irregular and varied between USC19 dearer to USC12 below previous rates.

Brighter - Met irregular enquiry and ranged between USC16 dearer to easier by up to USC10.

Mediums - KTDA mediums were steady to mostly dearer by up to USC19 but select lines lost up to USC3 while plantation mediums gained up to USC11 with a few invoices USC15 below last rates. Lower Medium - Improved absorption and varied between firm to USC12 dearer to easier by up to USC3.

Plainer - Steady to USC8 above previous rates to easier by up to USC10.

CTC QUOTATIONS	BP1 - USC	PF1 - USC
Best	217 - 448	280 - 388
Good	200 - 294	263 - 321
Good Medium	190 - 270	268 - 301
Medium (KTDA)	130 - 212	135 - 244
Medium (Plantations)	125 - 216	134 - 169
Lower Medium	110 - 158	110 - 146
Plainer	096 - 120	080 - 124

DUST GRADES (M1)

PDUST:

Best - Met irregular interest varying between steady to USC13 above previous levels to easier by a similar margin with some teas discounted by up to USC20 and USC28.

Brighter - Irregular enquiry at mostly dearer levels by up to USC19 to easier by up to USC8 with some teas further discount by up to USC23.

Mediums - KTDA mediums were steady to mostly dearer by up to USC22 to easier by up to USC5 while plantation mediums lost up to USC16. Lower Medium - Mostly shed up to USC10 with select lines up to USC5 above last rates.

Plainer - Saw irregular enquiry ranging between firm to USC9 above previous rates to easier by up to USC4.

DUST1:

Best - Mostly advanced by up to USC14 but some invoices shed up to USC2.

Brighter - Gained by up to USC17 with select lines discounted by up to USC6.

Mediums - KTDA mediums were firm to USC22 above previous levels to easier by up to USC14 with plantation mediums discounted by up to USC10. Lower Medium - Firm to USC3 dearer to easier by USC1.

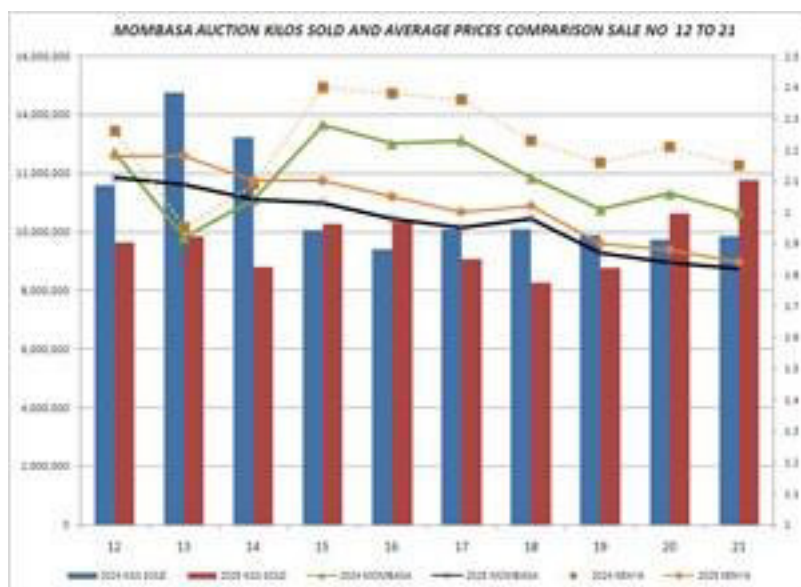
Plainer - Ranged between steady to USC5 dearer to easier by up to USC7

CTC QUOTATIONS	PDUST - USC	DUST1 - USC
Best	226 - 300	287 - 350
Good	205 - 276	282 - 306
Good Medium	204 - 257	224 - 308
Medium (KTDA)	126 - 226	130 - 248
Medium (Plantations)	140 - 200	135 - 170
Lower Medium	110 - 164	120 - 141
Plainer	107 - 124	108 - 119

SECONDARY GRADES (S1)

In the Secondary Catalogues, BPs held value while PFs were irregular. Clean well sorted coloury Fannings were firm with similar DUSTs mostly steady while some lines were up to USC16 dearer. Other Fannings sold at around previous levels with DUSTs firm. BMFs were readily absorbed at steady rates.

SECONDARY QUOTATIONS (USC)	BP/BP2	PF/PF2	FNGS1/FNGS	DUST/DUST2	BMF
Best/Good	146 - 264	151 - 238	126 - 230	116 - 252	092
Good Medium/Medium	-	-	100 - 156	100 - 180	-
Lower Medium	102 - 163	095 - 128	084 - 129	072 - 120	079 - 094
Plainer	093 - 135	076 - 105	078 - 096	070 - 1100	078 - 088



Courtesy - Africa Tea Brokers Limited.

BANGLADESH AUCTION

02ND JUNE 2025 (SALE NO.05)

CTC LEAF: 32,690 packages of tea on offer met with less demand.

BROKENS/FANNINGS: Well made good liquoring varieties were a good market and were mostly firm to slightly easier selling between Tk.260/- and Tk.300/-. Below best were also a good market and were around last levels selling between Tk.240/- and Tk.250/-. Medium varieties sold between Tk.220/- and Tk.230/-. Plain varieties were about steady and could be quoted between Tk. 190/- and Tk.200/-. BLF teas sold fairly well between Tk. 160 and 217/-.

DUST: 7,425 packages of tea on offer met with a good demand. Well made good liquoring Dusts sold well at slightly easier rates. Their Mediums were fully firm to slightly dearer closely following quality. Plain/BLF Dusts sold quite well with several withdrawals. Blenders lent good support with fair interest from the Loose tea buyers.

COMMENTS: Market witnessed a little competition this week. Blenders continued to lend good support whilst Loose tea buyers were much less active compared to last. As a result, there was a progressive decline in value.

Dusts sold well.

Our Catalogue: (Sale 5) Avg : Tk 245.36, Sold 70.68% , (Sale 4) Avg : Tk 249.32, Sold 44.44%

QUOTATIONS	BROKENS	QUOTATIONS	FANNINGS
Best	2.14-2.47	Best	1.65-2.42
Good	1.90-2.06	Good	1.69-2.48
Medium	1.81-1.90	Medium	2.14-2.36
Plain	1.57-1.65	Plain	2.14-2.60
BLF	1.32-1.79	BLF	1.32-2.02

Courtesy - National Brokers Limited.

TEA MARKETS AROUND THE WORLD

COONOR AUCTION

24TH MAY 2025 (SALE NO.21)

CTC LEAF

The total CTC leaf teas sold this week was 82.59 %(1,571,731.19kgs) of the total offering of 1,903,159.86Kgs

DEMAND:- Good on the best & good categories, selective on the other categories.

Market:- Best & good teas maintaining quality fetched dearer prices in line with quality. Other categories continued to decline in prices in the range of Rs 3 to 5 compared to last week. Fanning grade suffered heavy withdrawals especially with progress of the sale. Buying Pattern:- Select Western India and local packateers along with few up country buyers actively absorbed the best & good teas. Major blenders along with Western India Packateer were fairly active on the remainders. There was fair participation from internal buyers but were very price sensitive. Exporters operated on the larger and medium broken actively at easier prices. The major blenders off take was 44.50% of the total CTC leaf sold.

ORTHODOX LEAF

DEMAND:- Good

Market:- Whole leaf, particularly the well made high grown continues to witness firm to dearer prices in line with both quality and competition . Broken and fanning grades ruled a barely steady prices. Dust grades continues to fetch firm to dearer prices.

Buying Pattern:- Exporters were the mainstay of the buying with fair support from internal buyers.

CTC DUST

DEMAND: - Good general demand.

MARKET: - CTC dust offer this week was at 485,366.71Kgs of which 352,098.71kgs were sold (72.54%). Best category teas sold at irregular levels following quality. Good category teas sold irregularly easier. Better medium & medium teas were barely steady to easier by Rs 2 to 3. Plainer teas sold easier by Rs 2 to 4. Browner sorts were discounted.

BUYING PATTERN: - Major blenders were fairly active. Regional and local packateers were selective along with the Up country and the local buyers . Exporters were fairly active on the bolder dust especially on cleaner and blacker sorts.

ORTHODOX DUST

DEMAND: - Good demand.

MARKET: - Primary dusts sold at irregular and dearer levels following quality, secondary teas too sold dearer on competition..

BUYING PATTERN: - Regional & local packateers were fairly active on primary dusts. Exporters were active on the secondary dusts.

Courtesy - J.Thomas & Co. Pvt. Ltd

TEA MARKETS AROUND THE WORLD

KOLKATA AUCTION

20TH MAY 2025 (SALE NO.21)

	2025	2024	DIFFERENCE
CTC	47,854	38,132	9,722
ORTHODOX	45,962	34,584	11,378
DUST	20,037	18,092	1,945

KOLKATA SALE CTC MARKET

MARKET REPORT:

Assams meeting with good enquiry at irregularly easier levels. Medium and plainer Dooars tending easier and seeing some withdrawals.

BUYING PATTERN:

Western India: Supporting the better teas

HUL: Operating

TCPL: Better support than last

Exporters: Fair enquiry on bolder broken and fannings

Other Internal/Local: Operating

KOLKATA SALE ORTHODOX MARKET

MARKET REPORT:

Market opened to strong demand. Clean well made Whole leaf and Larger Broken maintaining quality selling irregular around last. Similar Smaller Broken and cleaner Secondaries irregular and at times tending lower. Bolder Broken (BPS/BOP) tending irregularly lower and seeing lesser competition. Remainder Whole leaf, Broken and browner stalkier Secondaries showing a seasonal decline selling at irregularly lower rates. Leafy Fannings selling readily.

BUYING PATTERN:

Middle East : Active

CIS: Good Support

KOLKATA SALE DUST MARKET

MARKET REPORT:

Liquoring dusts and selected PDs are selling well with few lines appreciating. The medium category PDs are irregularly easier, dust around last levels.

BUYING PATTERN:

HUL: Mainstay

Western India: Operating

Other internal and local: Fair Support

Courtesy - J Thomas & Company Private Limited

COCHIN AUCTION

21ST MAY 2025 (SALE NO.21)

QUANTITY	2025 kgs	2024 kgs	Difference
ORX	3,35,423	1,12,830	2,22,593
CTC	31,986	29,688	2,298
Total	3,67,409	1,42,518	2,24,891

ORTHODOX LEAF

MARKET:

Good demand.

Clean, black, well made Whole-leaf and Larger Broken were tending to be fully firm to dearer; The remainder was irregular and occasionally lower, following quality.

BUYING PATTERN:

M.E. - Active

C.I.S. - Good support HUL - Absent

CTC LEAF

MARKET:

Good demand.

Broken were irregular and occasionally lower by Re.1 -2; Blacker Fannings were irregular around last.

BUYING PATTERN:

Major Blenders - Absent Internal - Active

Exporters - Active on Fannings

Courtesy - J.T. COCHIN

TEA MARKETS AROUND THE WORLD

SILIGURI AUCTION

21ST MAY 2025

	2025-2026	2024-2025	DIFFERENCE
CTC	98,372	39,092	59,280
DARJEELING	-	-	-
GREEN	-	-	-
DUST	9,262	8,078	1,184
TOTAL	107,634	47,170	60,464

CTC LEAF MARKET REPORT -21ST MAY 2025 STAC

OFFERINGS IN PACKAGES (SALE NO 21)

DEMAND / MARKET DETAILS: Market opened to good demand. Improved Good and Best teas selling at dearer levels. Medium and Plainer sorts sold at irregular levels following quality, Browner sorts witnessing withdrawals.

BUYING PATTERN:

Internal / Local Packeteers:

Mainstay TCPL: Selective

W.I: Operating

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

MALAWI AUCTION

21ST MAY 2025 (SALE NO.21)

LIMBE MARKET REPORT SALE 21 HELD ON 21/05/2025

Less and selective interest continued this week for the 6860 packages on offer at generally firm to easier where sold.

BP1 met selective interest and were firm on last where sold.

PF1 - Selected invoices held firm with the majority taken out.

PD/D1 were not supported.

PF1SC - Single invoice sold on last level but the rest were neglected.

Secondaries sold 5-9USC below valuation where sold.

Courtesy - TEA BROKERS CENTRAL AFRICA LIMITED

GUWAHATI AUCTION

20TH MAY 2025 (SALE NO.21)

Market: CTC

There was fair demand. Nominal weight of improved varieties tended dearer with competition. Remainder were irregular and easier. Plainer/ browner sorts witnessed noticeable withdrawals.

Buying Pattern: CTC.

There was fair support from HUL/ Western India buyers. TCPL participated selectively. North India buyers operated. Exporters enquiry was seen on the larger broken in the better medium segments.

Market: DUST

The dust market witnessed improved demand. Good liquoring Assams were mostly dearer with competition. Remainder varieties were irregular following quality.

Buying Pattern: DUST

HUL/ Western India participated actively on the better liquoring sorts. TCPL/ North India buyers operated.

Courtesy -ASSOCIATED BROKERS PVT. LTD -GUWAHATI