



ONE40

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of produce broking...*

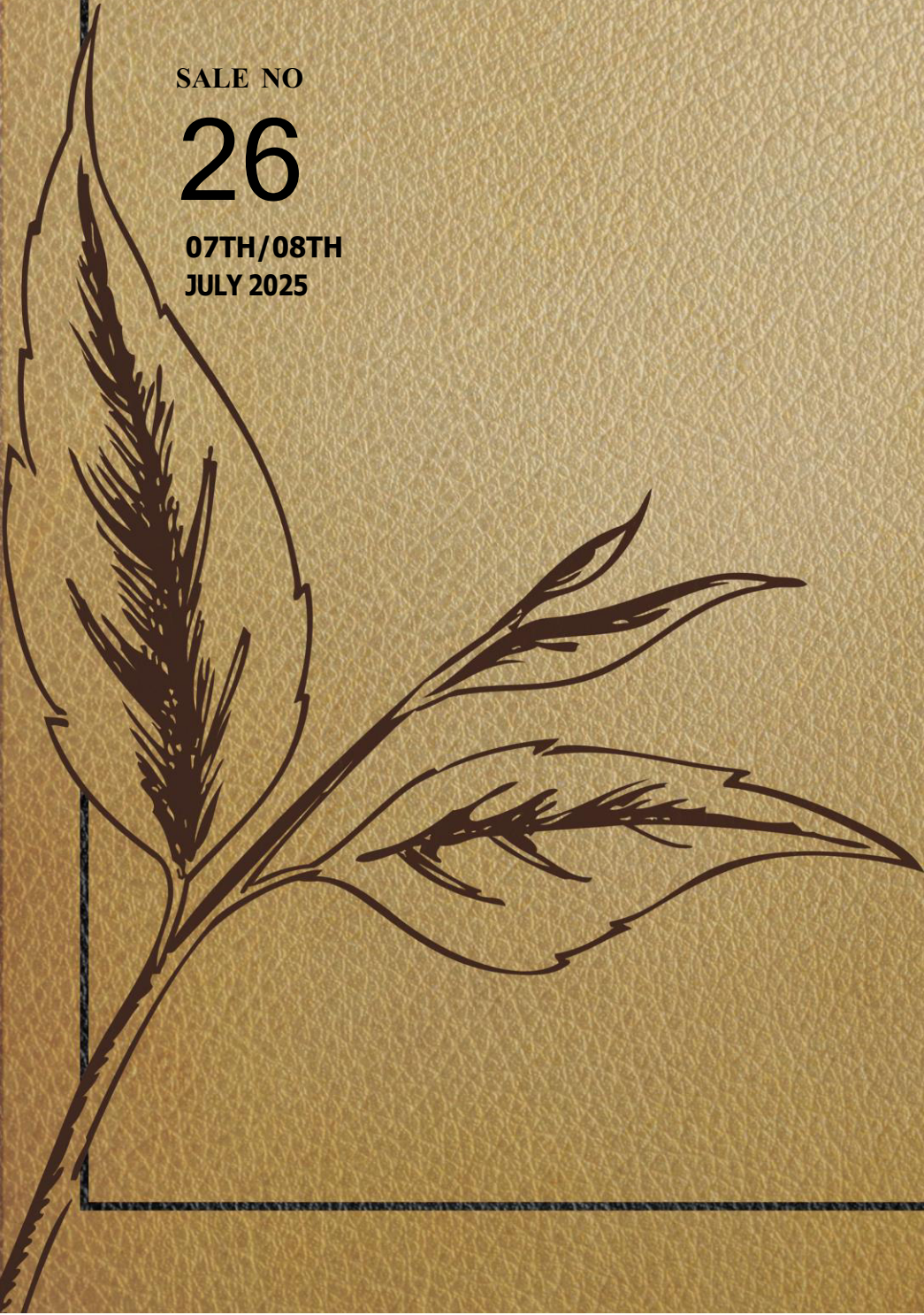
FORBES & WALKER TEA BROKERS PVT LTD

WEEKLY TEA MARKET REPORT

SALE NO

26

**07TH/08TH
JULY 2025**



Overall Market

	QTY (M/KGS)	DEMAND
Ex Estate	0.77	Good
High & Medium	0.84	Fair
Leafy	0.81	Good
Semi Leafy	0.67	Good
Tippy/Small Leaf	1.05	Good
Premium Flowery	0.06	Good
Off Grade	1.37	Irregular
Dust	0.51	Fair
Total	6.08	Good general

ORDER OF SALE

SALE NO : 26

07TH/08TH JULY 2025

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

AUCTION DETAILS

AT THIS WEEK'S SALE 12,002 LOTS TOTALLING 6,085,835 KGS WERE ON OFFER. THE BREAKDOWN IS AS FOLLOWS:

	LOTS	QUANTITY
Ex Estate	771	770,771
Main Sale - High & Medium	1,868	845,633
Low Grown - Leafy	2,073	809,397
Low Grown - Semi Leafy	1,555	668,851
Low Grown - Tippy	2,227	1,052,776
Premium Flowery	410	61,889
Off Grades	2,536	1,370,390
Dust	562	506,128
Total	12,002	6,085,835
Re - Prints	1,623	795,745

SETTLEMENT DATES

11/07/2025 14/07/2025 15/07/2025

10% Payment

Buyers Prompt

Sellers Prompt

Quality

Overall, fairly similar to last.

COMMENTS

Auction offerings totalled 6.1 M/Kgs, marginally lower to the 6.4 M/Kgs of last week. Good general demand and a firm to dearer trend in prices for most teas on offer, perhaps reflective of an anticipated decline in volumes and a strong parity rate favouring exports.

Ex-Estate offerings were similar to last and totalled 0.8 M/Kgs. Overall quality of teas were fairly similar to last.

Best Western BOP/BOPF's continued to sell around last week's levels subject to price fluctuations following quality. In the Below Best category, a selection of brighter BOP/BOPF's gained up to Rs. 50 per kg, whilst the others were irregular. At the lower end, BOP's were firm and marginally dearer for the cleaner sorts, whilst the corresponding BOPF's were barely steady. Nuwara Eliyas' were mostly unsold due to a lack of suitable bids. Uda Pussellawa BOP/BOPF's were barely steady. Uva - BOP's were firm, whilst a select range of clean leaf coloury BOPF's gained up to Rs. 50 per kg. Others sold around last.

CTC teas sold around last week's levels.

Select liquoring Leafy teas, both from the Eastern and Western sectors, in the High & Medium catalogues continued to attract fairly useful demand.

Selective buying from shippers to the UK and the continent, whilst there was less activity from shippers to South Africa. Fair activity from shippers to Japan, China, whilst shippers to the CIS and Middle East continued to be active on a wider cross-section of the teas.

Low Grown totalled approximately 2.5 M/Kgs, with the Leafy, Semi-Leafy, Tippy and Premium categories experiencing good demand.

In the Leafy and Semi-Leafy catalogues, well-made BOP1's appreciated, whilst the others including the bolder varieties remained firm. Select Best and Best OP1's together with the Below Best varieties appreciated, whilst the balance were firm. Well-made OP's and the cleaner Below Best sorts gained, with the others selling around previous levels. The neater, shorter varieties gained in value, whilst the balance mixed/open types were irregular. High-priced OPA's eased, whilst the balance were firm to dearer. Select Best and Best PEK's were firm to dearer, whilst the others including the mixed/open varieties were lower. Teas at the lower end held firm. PEK1's, in general were firm.

In the Tippy category, Select Best and Best FBOP's appreciated, whilst the balance were firm. Select Best FF1's were firm, whilst the Best were firm to easier. Below Best varieties and teas at the bottom sold at last levels.

In the Premium catalogue, very Tippy teas experienced strong demand and were significantly higher in price, whilst the Best and Below Best sorts appreciated, though to a lesser extent. However, teas at the lower end were irregular.

World Tea News

Climate Change Redraws Global Tea Map

Climate change will significantly redraw the contours of the global tea industry by mid-century. By 2050, more than half of the world's top 20 tea-producing countries are projected to see notable declines in the availability of land highly suitable for tea cultivation.

Kenya, one of the leading exporters of black tea, could lose up to 26.2% of its optimal tea-growing zones, with average suitability dropping by as much as 39%.

India forecasts a slight decline of just over 2% in highly suitable areas, while others point to gains, particularly in higher altitudes, suggesting potential upslope shifts.

Sri Lanka, another major player, may see a 14% drop in optimal areas by 2050, worsening to nearly 30% by 2070.

Even China is not immune, with projections showing a 4.7% reduction in its top-tier tea-growing zones, which could intensify under more severe climate scenarios.

The potential loss of prime land could directly affect farmer incomes, crop quality, and global tea availability — challenges that demand proactive adaptation strategies. However, the shifting climate also presents new opportunities. Some countries are expected to benefit from altered growing conditions. Turkey, for instance, could see a dramatic 127-130% increase in moderately suitable tea-growing land by 2050, particularly in elevated, cooler regions.

Other countries such as Iran, Rwanda, and Thailand are projected to gain between 11% and 27% in highly suitable tea cultivation zones, potentially emerging as new tea-producing hubs. These areas offer investment possibilities, though they will require significant infrastructure development, policy support, and technical capacity building to fully realize their potential.

As the climate crisis accelerates, the future of tea will depend on how quickly and effectively the industry, across continents and supply chains, can respond. Without immediate, coordinated efforts, some of the world's most iconic tea landscapes may become unsuitable for cultivation within a generation.

Source: STiR Coffee & Tea (Extracts), Courtesy: Tea Exporters' Association Sri Lanka

CROP AND WEATHER

FOR THE PERIOD 02 - 07 July 2025

Western/Nuwara Eliya Regions



Bright weather with occasional drizzles were reported from the Western and Nuwara Eliya regions throughout the week. According to the Department of Meteorology, rain is expected in both regions in the week ahead.

Uva/Udapussellawa Regions



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

Low Grown



Bright weather and occasional evening showers were reported throughout the week in the Low Grown Region. The Department of Meteorology expects fairly strong winds in the Low Grown Region in the week ahead.

Crop

All regions reported a significant decrease in the crop intake.

HIGH GROWN TEAS

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

BOP

Best Western's continued to sell around last in keeping with quality. In the Below Best category, a selection of brighter teas appreciated by Rs. 50 per kg and more following quality, whilst the others were irregular. Teas at the lower end were firm and tended dearer. Nuwara Eliya's were mostly unsold. Uva/Uda Pussellawa's were firm.

BOPF

Best Western's sold around last following quality. In the Below Best category, a selection of brighter teas were up to Rs. 50 per kg dearer, whilst the others were irregular. At the lower end, clean leaf teas were Rs. 20-40 per kg dearer, whilst the poor leaf teas were barely steady. Nuwara Eliya's were mostly unsold. Uda Pussellawa's were barely steady. Uva's - Select clean leaf coloury sorts were up to Rs. 50 per kg dearer, whilst the others sold around last.

OP/OPA

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

PEKOE/PEKOE1

Flavours PEK's declined by Rs. 30-50 per kg and were mostly unsold, whilst the Orthodox Leafy PEK's were easier by Rs. 40-60 per kg. Best PEK1's were firm to irregularly easier by Rs. 40-60 per kg. Best Rotovane PEK's declined by Rs. 50 per kg and more following quality/special inquiry, whilst the others and poorer sorts sold around last levels.

FBOP/FBOPF1

Select Best flavoury FBOP's declined by Rs. 50-70 per kg. Better Orthodox FBOP's were easier by Rs. 20-40 per kg, whilst the FBOPF1's were firm. Below Best FBOP/FBOPF1's appreciated by Rs. 20-30 per kg, whilst the teas at the lower end sold at last levels.

QUOTATIONS LKR

SALE DTE	BOP		BOPF		PEKOE/FBOP		OP	
	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul
Best Westerns	1180-1480	1240 - 1380	1280-1500	1300 - 1400	1260-1650	1260 - 1420	1000-1120	1100 - 1160
Below Best Westerns	920-1160	1100 - 1220	1100-1260	1120 - 1280	1040-1240	1060 - 1180	940-1000	960 - 1060
Plainer Westerns	820 - 900	880 - 1080	830-1080	880 - 1100	830-1020	840 - 1040	900-920	810 - 940
Nuwara Eliyas	N/A	N/A	1100	1200 -	880-1180	880 - 1260	920-960	920 - 980
Brighter Udapussellawas	890 - 940	890 - 900	960-1060	1000 - 1140	1200-1500	1160 - 1220	980-1040	980 - 1040
Other Udapussellawas	840 - 850	850 - 860	850 - 880	850 - 920	880-1180	870 - 1140	850-960	830 - 960
Best Uvas	1060-1120	1120 - 1240	1160-1240	1200 - 1300	1240-1550	1260 - 1600	1020-1140	1040 - 1160
Other Uvas	880-1020	920 - 1040	940-1120	1040 - 1140	850-1220	870 - 1240	860-1000	860 - 1020

MEDIUM GROWN TEAS

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

BOP Firm and marginally dearer.

BOPF Better sorts were firm, whilst the poorer sorts were mostly unsold.

OP/OPA Well-made OP/OPA's were firm on last, whilst the others gained by Rs. 20 per kg.

PEKOE/PEKOE1 PEK's declined by Rs. 60-80 per kg and more at times. Best PEK1's were firm to easier by Rs. 40-60 per kg, whilst the Below Best and bottom end types declined by a similar margin.

FBOP/FBOPF1 A few Select Best FBOP's were irregularly dearer, whilst the others appreciated by Rs. 20-40 per kg. Better FF1's appreciated by Rs. 20-40 per kg, whilst the others in the Best and Below Best categories were dearer by Rs. 40 per kg. Teas at the lower end gained by Rs. 20 per kg.

QUOTATIONS LKR SALE DTE	BOP		BOPF		PEKOE/FBOP		OP	
	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul
Good Mediums	1300-1550	1220 - 1600	1040-1100	1000 - 1100	1320-1650	1380 - 2400	1040-1160	1060 - 1160
Other Mediums	820-1160	830 - 1100	780 - 940	800 - 880	870-1300	880 - 1340	800-1020	810 - 1040

UNORTHODOX / CTC TEAS

HIGH GROWN BP1s - Hardly any offerings. PF1s - Firm.

MEDIUM GROWN BP1s - Irregular. PF1s - Sold around last.

LOW GROWN BP1s - Hardly any offerings. PF1s - Firm and marginally easier.

QUOTATIONS LKR SALE DTE	BP1		PF1	
	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul
High Grown	N/A	N/A	880-1140	890 - 1120
Medium Grown	N/A	1020 -	870-1140	890 - 1120
Low Grown	1240	N/A	1140-1500	1080 - 1600

OFF GRADES

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

FGS1/FGS

FGS/FGS1s - Teas in the Best category were firm on last. Improved Below Best varieties, gained by Rs. 10-20 per kg, whilst the others maintained. Teas at the lower end of the market were irregular and mostly lower. Low Grown - Clean leaf varieties together with the Below Best sorts were firm, whilst the teas at the bottom end of the market declined. CTC - In general, were firm to easier.

BROKENS

Brokens - Reducer varieties in the Best category maintained, whilst the clean leaf sorts gained by Rs. 10-20 per kg. Balance which commenced firm, declined as the sale progressed. BT grade, in particular, declined sharply towards the latter part of the sale.

BOP1A

Main Grade reducer varieties in the Best category were firm, whilst the balance together with the Below Best varieties were easier by Rs. 20-30 per kg. Poorer sorts maintained around last week's levels.

QUOTATIONS LKR

SALE DTE	HIGH		MEDIUM		LOW	
	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul
Better Fannings (Orthodox)	790-1120	800 - 1140	790-840	800 - 850	800-870	800 - - 900
Better Fannings (CTC)	N/A	N/A	860-900	820 -	780-1200	770 - - 1100
Other Fannings (Orthodox)	620-780	590 - 790	620-780	630 - 790	600-790	600 - - 790
Other Fannings (CTC)	N/A	N/A	700-760	720 - 780	680-770	650 - 760
Good Brokens	810-1020	800 - 1020	810-1080	800 - 1200	830-1240	810 - 1280
Other Brokens	690-800	730 - 790	710-800	710 - 790	650-820	650 - - 800
Better BOP1As	860-1000	840 - 880	860-1020	840 - 960	860-1420	840 - 1400
Other BOP1As	820-850	810 - 830	800-850	790 - 820	730-850	780 - 820

DUSTS

DUST1

Select Best Dust1's together with the Best varieties were dearer by Rs. 20-40 per kg. The Below Best types together with poorer sorts remained firm. Low Grown Best varieties were dearer by Rs. 40 per kg, whilst the Below Best and poorer sorts remained firm. Best High and Medium Grown CTC's were irregularly easier by Rs. 20 per kg, whilst the others followed a similar trend. Best Low Grown CTC's were firm to dearer by Rs. 20 per kg, whilst the others remained firm.

DUST

Clean leaf secondaries appreciated by Rs. 40 per kg, whilst the poorer sorts were firm to dearer by Rs. 20-30 per kg. The Low Grown Best varieties appreciated by Rs. 40, whilst the others remained firm.

QUOTATIONS LKR

SALE DTE	HIGH		MEDIUM		LOW	
	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul
Better Primary Dust (Orthodox)	1120-1650	1140 - 1600	940-1000	980 - 1100	900-940	960 - 1280
Better Primary Dust (CTC) P. Dust	1000-1220	1000 - 1140	980-1040	1020 - 1120	1140-1360	1140 - 1360
Below Best Primary Dust (Orthodox)	920-1100	950 - 1120	860-920	850 - 960	770-880	790 - 940
Other Primary Dust (CTC) P. Dust	830-980	860 - 980	730-960	860 - 1000	670-1100	740 - 1120
Other Primary Dust (Orthodox)	630-900	740 - 940	660-850	600 - 840	630-760	640 - 780
Better Secondary Dust	900-1200	900 - 1000	800-890	N/A	920-980	960 - 1040
Other Secondary Dust	610-890	630 - 880	650-780	640 - 780	630-900	630 - 940

LOW GROWN TEAS

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

FBOP/FBOP1	Select Best and Best FBOP's were dearer, whilst the balance sold around last levels. FBOP1's, in general, were firm.
BOP	BOP's, in general, were firm.
BOP1	Well-made BOP1's appreciated, whilst the balance together with the bolder varieties were firm.
OP1	Well-made OP1's together with the Below Best varieties appreciated, whilst the teas at the bottom were firm.
OP	Well-made OP's together with cleaner Below Best appreciated, whilst the balance sold around last levels. The neater shorter varieties too gained, whilst the balance mixed/open types were irregular.
OPA	High-priced OPA's eased, whilst the balance were firm to dearer.
PEKOE	Select Best and Best PEK's were firm to dearer, whilst the balance together with the mixed/open varieties were lower. Teas at the bottom sold around last levels. PEK1's, in general, were fully firm.
BOPF	BOPF's, in general, were firm on last.
FBOPE/FBOPF1	Very Tippy Teas met with good demand and were substantially dearer, whilst the Best and Below Best too gain to a lesser extent. However, the balance were irregular. Select Best FF1's were firm, whilst the Best were firm to easier. Below Best and teas at the bottom sold around last levels.

QUOTATIONS LKR SALE DTE	SELECT BEST		BEST		BELOW BEST		OTHERS	
	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul	01/02 Jul	07/08 Jul
FBOP 1	1700-1900	1700 - 1900	1450-1600	1450 - 1600	1250-1350	1250 - 1350	1000-1100	1000 - 1100
FBOP	1950-2250	1950 - 2300	1500-1600	1500 - 1600	1200-1250	1250 - 1300	1000-1100	1000 - 1100
BOP 1	2250-3050	2350 - 3050	1750-2150	1800 - 2300	1000-1360	1100 - 1460	850-980	850 - 1080
BOP	1700-2000	1700 - 2000	1350-1400	1350 - 1400	1150-1300	1150 - 1300	900-1000	900 - 1000
BOPF	1200-1400	1200 - 1400	900-1000	900 - 1000	850-900	850 - 900	800-850	800 - 850
FBOPF (TIPPY)/FBOPF SP	3500-4500	4000 - 5000	2500-3000	3000 - 3500	1800-2200	2000 - 2500	1000	1000 -
FBOPF 1	1550-1650	1600 - 1700	1350-1400	1400 - 1450	1250-1300	1250 - 1300	950-1100	950 - 1100
FBOPF	1500-1700	1600 - 1800	1300-1400	1350 - 1450	950-1100	1000 - 1100	900-950	900 - 950
OP 1	2500-3200	2600 - 3200	2300-2450	2350 - 2550	1500-2250	1550 - 2300	900-1480	900 - 1500
OP	1400-1550	1440 - 1500	1280-1380	1320 - 1420	1160-1260	1200 - 1300	880-1140	880 - 1180
OPA	1360-1700	1400 - 1550	1180-1340	1220 - 1380	1000-1160	1100 - 1200	820-980	850 - 1080
PEKOE	1550-2400	1550 - 2450	1340-1500	1360 - 1500	1100-1280	1100 - 1320	820-1080	820 - 1080
PEK 1	1700-2300	1700 - 2550	1500-1650	1500 - 1650	1240-1480	1260 - 1480	900-1220	900 - 1240

TOP PRICE

WESTERN MEDIUM			
Dartry Valley	BOP	@	1600
Orange Field	BOPSp		1200
Dartry Valley	BOPF/BOPFSp	@	1220
Galgewatta	BOP1		1650
Craighead	FBOP/FBOP1	@	2400
Ancoombra	FBOPF/FBOPF1		1650
Dartry Valley	FBOPF/FBOPF1	@	1600
Windsorforest	FBOPF/FBOPF1	@	1550
Craighead	FBOPF/FBOPF1	@	1550
Dartry Valley	FBOPF/FBOPF1		1550
Greenwood	OP/OPA		1160
Hansagiri Kothmale	OP/OPA		1160
Craighead	OP1	@	1850
Uplands	PEK/PEK1		2000
WESTERN HIGH			
Ingestre	BOP	@	1380
Queensberry	BOPSp	@	1240
Alton	BOPF/BOPFSp	@	1400
Gouravilla	BOPF/BOPFSp	@	1380
Wanarajah	BOPF/BOPFSp		1380
St Andrews	BOP1		1500
Kirkoswald	FBOP/FBOP1	@	1420
Bambarakelly	FBOP/FBOP1		1420
Fairlawn	FBOPF/FBOPF1		1420
Glenloch	FBOPF/FBOPF1	@	1380
Inverness	OP/OPA		1140
Glenloch	OP/OPA	@	1120
St Andrews	OP/OPA		1120
Torrington	OP/OPA	@	1100
St Andrews	OP1		1320
Fairlawn	PEK/PEK1		1600
NUWARA ELIYAS			
Lovers Leap	BOPF/BOPSp		1200
Court Lodge	FBOP/FBOP1		1260
Kenmare	OP/OPA		980
Court Lodge	OP/OPA	@	940
Kenmare	PEK/PEK1		1020
UDAPUSSELLAWAS			
Maha Uva	BOP	@	1020
Delmar	BOPSp		1100
Luckland	BOPF/BOPFSp		1160
Maha Uva	BOP1	@	1260
Maha Uva	FBOP/FBOP1	@	1440

UDAPUSSELLAWAS			
Blairlomond	FBOPF/FBOPF1	@	1400
Delmar	FBOPF/FBOPF1	@	1400
Maha Uva	OP/OPA	@	1120
Gampaha	OP1		1420
Gonapitiya	PEK/PEK1		1460
LOW GROWNS			
Elaine Super	BOP		2400
Kamarangapitiya	BOPSp	@	2150
New Spring View	BOPSp		2150
Kings Bru	BOPF		1800
Pothotuwa	BOPF	@	1500
Rajjuruwatta Super	BOPFSp		2300
Greenwin Super	BOPFSp		2250
Kelani	BOPFSp	@	1550
Sithaka	FBOP		2600
Pothotuwa	FBOP	@	2500
Kiruwanaganga	FBOP1	@	2200
Gunawardana	FBOPF	@	1800
New Kolonne Kithulgala	FBOPF1	@	1700
Pothotuwa	FBOPF1	@	1700
Gunawardana	FBOPF1	@	1700
Sithaka	FBOPF1		1700
Lumbini	FBOPF1		1700
Makandura	FBOPF1		1700
Pothotuwa	BOP1	@	3050
Kiruwanaganga	BOP1		2600
Susantha	OP1		3200
Pothotuwa	OP1	@	2700
Bogoda Group	OP		1500
Lickra	OP		1500
Mahaliyadda	OP		1480
Green Lanka	OP		1480
Makandura	OP		1480
Lenama Hills	OP		1480
New Galagawa	OP		1480
New Kandedola	OP	@	1460
Kiruwanaganga	OP	@	1460
Green Lanka	OPA		1550
Liyonta	PEK		2450
Liyonta	PEK1		2550

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

UVA MEDIUM			
Dickwella	BOP		1550
Hindagala	BOPSp		1380
Haputale Super	BOPSp	@	1320
Dickwella	BOPF/BOPFSp	@	1500
Sarnia Plaiderie	BOP1	@	1700
Sarnia Plaiderie	FBOP/FBOP1	@	1550
Roseland Uva	FBOP/FBOP1		1550
Aruna Keppetipola	FBOP/FBOP1		1550
Dickwella	FBOP/FBOP1	@	1500
Adawatte	FBOP/FBOP1		1500
Wewesse	FBOP/FBOP1		1500
Halpewatta Uva	FBOPF/FBOPF1	@	1950
Roseland Uva	OP/OPA		1220
Telbedde	OP1	@	1850
Dickwella	PEK/PEK1	@	1700
Sarnia Plaiderie	PEK/PEK1	@	1650
Misty-Uva	PEK/PEK1	@	1600
Aruna Keppetipola	PEK/PEK1		1600
Aruna Passara	PEK/PEK1		1600
UVA HIGH			
Bandaraeliya	BOP	@	1240
Gonamotawa	BOPSp	@	1440
Nayadedde	BOPF/BOPFSp	@	1280
Bandaraeliya	BOPF/BOPFSp	@	1220
Uva Highlands	BOP1		1750
Glenanore	FBOP/FBOP1		1600
Gonamotawa	FBOPF/FBOPF1	@	1420
Mount Uva	FBOPF/FBOPF1		1420
Glenanore	FBOPF/FBOPF1	@	1380
Balagalaella	FBOPF/FBOPF1	@	1360
Craig	FBOPF/FBOPF1		1360
Ellathota Uva	OP/OPA		1180

UVA HIGH			
Ellathota Uva	OP1		1500
Craig	PEK/PEK1		1550
UNORTHODOX HIGH			
Dunsinane CTC	PF1	@	1120
Florence CTC	PF1		1120
Ulugedara CTC	PF1		1120
Mount Vernon CTC	BPS		780
UNORTHODOX MEDIUM			
New Peacock CTC	PF1	@	1120
Strathdon CTC	PF1		1120
Strathdon CTC	BP1		1020
Ancoombra CTC	BPS		770
UNORTHODOX LOW			
Hingalgoda CTC	PF1		1600
Nelunwatta CTC	BP1		820
Ross Feld CTC	BPS		740
PREMIUM FLOWERY			
Greenwin Super	FBOPFSp		5250
Fortune	FBOPFSp	@	4650
Kiruwanaganga	FBOPFExSp	@	6000
Muswenna	FBOPFExSp1	@	6050
Kiruwanaganga	FBOPFExSp1	@	5750
DUSTS			
Mattakelle	DUST1		1600
Ceciliyan CTC	PD		1360
OFF GRADES			
Wattegodde	FGS/FGS1		1140
Kelliebedde	FGS/FGS1	@	1000
Wanarajah	FGS/FGS1	@	980
Mattakelle	FGS/FGS1		980
Clydesdale	FGS/FGS1		980
Liyonta CTC	PF		1100
Hingalgoda CTC	PF		1100
Greenwin	BM		1140
Greenwin	BP		1280
Chandrika Estate	BOP1A		1400

QUANTITY SOLD

DURING THE PERIOD 30TH JUNE-05TH JULY 2025	WEEKLY (KGS)		TODATE (KGS)	
	2025	2024	2025	2024
PRIVATE SALES	160,056	162,820	5,528,609	3,101,861
PUBLIC AUCTION	5,573,326	4,588,064	126,750,175	118,929,736
FORWARD CONTRACTS	44,000	42,700	1,402,831	890,150
DIRECT SALES	NIL	NIL	NIL	NIL
TOTAL	5,777,382	4,793,584	133,681,615	122,921,747
BMF EXCLUDED FROM PRIVATE SALE	11,326	15,900	993,650	1,163,427

(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
25TH JUNE 2025	5.28	4.88	6.26	1104.01	1263.04	965.28	3.72	4.23	3.18
01ST JULY 2025	5.57	4.59	4.86	1107.48	1256.79	1001.02	3.74	4.18	3.32

Source: Central Bank of Sri Lanka / Buying Rates

RATES OF EXCHANGE

SRI LANKA RUPEE APPROX PER UNIT OF CURRENCY

YEAR	2025	2024	2023
USD	296.24	300.39	299.87
STG.PD	402.57	378.16	379.87
EURO	347.16	1.85	2.06
YEN	2.03	320.69	326.27

Source: Central Bank of Sri Lanka / Buying Rates

PUBLIC AUCTION/GROSS SALES AVERAGE

SALE NO 25 01ST/ 02ND JULY 2025	WEEKLY(LKR)			TODATE (LKR)			WEEKLY(USD)			TODATE(USD)		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
Uva High Grown	985.25	1090.27	823.97	1034.91	1113.21	1040.89	3.33	3.63	2.73	3.50	3.65	3.15
Western High Grown	1019.82	1169.39	823.79	1091.43	1195.44	1212.16	3.45	3.89	2.73	3.69	3.92	3.67
CTC High Grown	1023.36	1099.59	762.53	1072.12	1125.14	1096.01	3.46	3.66	2.53	3.62	3.69	3.32
High Grown (Summary)	1007.82	1139.13	823.85	1073.67	1169.31	1160.54	3.41	3.79	2.73	3.63	3.83	3.51
Uva Medium Grown	1031.37	1159.17	918.23	1074.71	1155.19	1055.69	3.49	3.86	3.05	3.63	3.79	3.19
Western Medium Grown	935.84	1057.29	831.08	1011.90	1085.13	1040.61	3.16	3.52	2.76	3.42	3.56	3.15
CTC Medium Grown	882.10	1010.86	725.52	943.58	980.68	988.46	2.98	3.36	2.41	3.19	3.21	2.99
Medium Grown (Summary)	970.90	1096.12	862.45	1032.36	1108.81	1045.38	3.28	3.65	2.86	3.49	3.63	3.16
Orthodox Low Grown	1198.67	1377.14	1133.93	1258.10	1399.71	1327.68	4.05	4.58	3.76	4.25	4.59	4.02
CTC Low Grown	960.38	991.90	849.61	983.95	1024.19	976.62	3.25	3.30	2.82	3.32	3.36	2.95
Low Grown(Summary)	1185.10	1347.12	1115.93	1244.44	1374.61	1308.23	4.00	4.48	3.70	4.20	4.50	3.96
Total	1107.48	1256.79	1001.02	1172.08	1285.97	1232.92	3.74	4.18	3.32	3.96	4.21	3.73

Source: Oanda Exchange Rates

Source: MSL - Averages

WORLD TEA PRODUCTION (M/KGS)

				TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
	May							
Sri Lanka	26.8	24.6	25.4	111.6	104.8	113.9	-6.8	9.1

				TODATE			DIFFERENCE +/-	
	2023	2024	2025	2023	2024	2025	2023 vs 2024	2024 vs 2025
Apr								
Bangladesh	5.1	4.9	2.3	7.6	6.7	3.9	-0.9	-2.8
Malawi	5.9	6	6.8	24.9	26.8	24.9	1.9	-1.9
North India	63.1	63.8	72.9	132.1	112.9	133.4	-19.2	20.5
South India	18.5	12.3	22.2	59.3	61.3	69.7	2	8.4

				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

DETAILS OF AWAITING SALE

SALE NO : 27

Scheduled for 15TH/16TH JULY 2025

	LOTS	QUANTITY
ExEstate	777	760,431
High & Medium	2,140	974,273
Leafy	2,210	889,195
Semi Leafy	1,672	737,193
Tippy	2,093	995,689
Premium Flowery	403	63,586
OffGrades	2,605	1,406,690
Dust	548	487,227
Total	12,448	6,314,284
RePrint	1,414	691,543

22/07/2025

Buyers Prompt

23/07/2025

Sellers Prompt

This sale last year
Sale No. 27 | 09TH/10TH JULY 2024

Lots :11,296
Re-print Lots :671
Quantity :5,582,750 kgs
Re-print Quantity :322,822 kgs

LOW GROWN CATALOGUES

Violations Excluded

26/06/2025

LEAFY
Closed

SEMI-LEAFY
Closed

TIPPY
Closed

OTHER MAIN SALE CATALOGUES

26/06/2025

HIGH & MEDIUM
Closed

PREMIUM FLOWERY
Closed

OFF GRADES
Closed

NO .OF PKGS

172,572

CTC

10,130 Pkgs - 533,259 kgs

ORDER OF SALE

Approx Selling time of
F&W Catalogues

15TH

JULY 2025

Ex-Estate	LG Large Leaf//Semi Leafy/LG Small Leaf/BOP1A/ Premium	High & Medium/Off Grade /Dust		
JK	AS	LC		
CTB	MB	CTB		
LC	EB	EB	10.30am	Semi - Leafy Teas
AS	FW	JK	11.00am	Low Grown - Leafy Teas
MB	CTB	AS	12.00pm	Low Grown - Tippy Teas
BC	BC	MB	2.00pm	BOP1A
EB	JK	FW	4.30pm	Main Sale - High & Medium
FW	LC	BC	5.00pm	Premium Flowery

16TH

JULY 2025

10.30am	Ex-Estate
10.30am	Off Grade
2.00pm	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 : 28
Scheduled for 22ND/23RD JULY 2025

	LOTS	QUANTITY
ExEstate	739	713,699
High & Medium	1,749	787,170
Leafy	2,112	836,355
Semi Leafy	1,598	697,770
Tippy	1,984	927,161
Premium Flowery	398	57,723
OffGrades	2,649	1,413,184
Dust	567	504,756
Total	11,796	5,937,818
RePrint	859	462,112

29/07/2025

Buyers Prompt

30/07/2025

Sellers Prompt

This sale last year
Sale No. 28 | 15TH/17TH JULY 2024

Lots	:10,793
Re-print Lots	:759
Quantity	:5,392,715 kgs
Re-print Quantity	:356,296 kgs

LOW GROWN CATALOGUES

Violations Excluded

03/07/2025

LEAFY	SEMI-LEAFY	TIPPY
Closed	Closed	Closed

OTHER MAIN SALE CATALOGUES

03/07/2025

HIGH & MEDIUM	PREMIUM FLOWERY	OFF GRADES
Closed	Closed	Closed

NO .OF PKGS

162,749

CTC

9,570 Pkgs - 504,272 kgs

CATALOGUE CLOSURE DETAILS

22/23

JULY 2025

Sale No. 28

The Ex-Estate catalogue closed on 03rd July 2025, excluding violations. The Main Sale catalogues too closed on 03rd July 2025, excluding violations.

29/30

JULY 2025

Sale No. 29

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

04/05

AUGUST 2025

Sale No. 30

The Ex-Estate and Main Sale catalogues are scheduled to close on 17th July 2025.

TEA MARKETS AROUND THE WORLD

BANGLADESH AUCTION

07TH JULY 2025 (SALE NO. 09)

CTC LEAF: 49,811 packages of tea on offer once again met with a good demand.

BROKENs: All well made Broken s sold well particularly the bright liquoring varieties which were often competed for and a few lines were dearer. Medium varieties met with a fairly good demand and sold at previous rates. There were a few withdrawals. Plain teas met with some demand and a fair weight was withdrawn without bids. BLF teas sold well in line with quality and there were fewer withdrawals. These realised prices between Tk. 170/- and Tk.229/-.

FANNINGS : Best Fannings were quite a strong feature and were about firm. Good/Medium teas met with a fairly good demand and sold well in line with quality. Plain teas met with only some demand and there were several withdrawals in this category. BLF teas sold well in line with quality and there were fewer withdrawals. These realised prices between Tk. 170/- and Tk.225/-.

DUST: 11,805 packages of tea on offer met with a fairly good demand. Well made good liquoring Dusts were in good demand and sold in line with quality. Others were an easier market and sold at a drop of Tk.8/- to Tk.10/- following quality. BLF Dusts met with good demand and had only few withdrawals. Blenders lent strong support with fair interest from the Loose tea buyers.

COMMENTS: There was a little more competition in this week's sale whereby a few teas advanced in value by Tk.2/- to Tk.5/-. Blenders as well as Loose tea buyers were more active this week. Dusts sold well.

Our Catalogue: (Sale 9) Avg : Tk 242.31, Sold 77.41% , (Sale 8) Avg : Tk 240.43, Sold 73.75%

QUOTATIONS	BROKENs	QUOTATIONS	FANNINGS
<i>Best</i>	2.10-2.26	<i>Best</i>	2.10-2.26
<i>Good</i>	2.05-2.07	<i>Good</i>	2.05-2.07
<i>Medium</i>	2.01-2.03	<i>Medium</i>	2.01-2.03
<i>Plain</i>	2.01-2.03	<i>Plain</i>	2.01-2.03
<i>BLF</i>	1.40-1.88	<i>BLF</i>	1.40-1.85

Courtesy - National Brokers Limited.

KOLKATA AUCTION

08TH JULY 2025 (SALE NO. 28)

	2025	2024	DIFFERENCE
CTC	73,679	46,753	26,926
ORTHODOX	88,062	40,116	47,946
DUST	32,824	27,958	4,866

KOLKATA SALE CTC MARKET

Market opened to good demand. Liquoring sorts selling readily around last levels. Mediums and plainer sorts selling irregularly easier and seeing some withdrawals.

BUYING PATTERN:

Western India: Active

Exporters: Good support

HUL: Operating

West Bengal Manufacturing: Selective

KOLKATA SALE ORTHODOX MARKET

MARKET REPORT:

Market opened to strong demand. well made Whole Leaf and Broken s selling at levels around last. Remainder Whole Leaf and Broken s firm around last levels. Fannings and Cleaner Secondaries following a similar trend.

BUYING PATTERN:

Middle East : Active

CIS: Good Support

HUL: Operating

Coutesy - J Thomas & Company Private Limited

TEA MARKETS AROUND THE WORLD

COONOR AUCTION

04TH JULY 2025 (SALE NO. 27)

CTC LEAF

The total CTC leaf teas sold this week was 62.06%(1,232,603.38kgs) of the total offering of 1,986,277.70Kgs

Demand:- Good demand continued to persist for the Best, good & better medium, but feeble demand for the medium and plainer.

Market:- Best & Good category teas continued to meet with prices at irregular levels closely following quality. Better Medium larger broken sold barely steady whilst the other sorts declined by Rs 2 to 6. Medium and plainer teas declined by Rs 2 to 4 in all sorts however larger percentage of lower medium and plainer teas were out listed with want of bids..

Buying Pattern:- Major blenders along with Western India packateer lent fair support at easier levels. Other up country and regional packateers were active on best & good teas. Internal buyers were rather subdued. CIS and Russia continued be selective on blacker sorts. The major blenders off-take was 53.71% of the total CTC leaf sold.

ORTHODOX LEAF

Demand:- Good Demand.

Market:- High grown whole leaf sold firm to dearer following quality. Medium grown whole leaf were irregular. Broken in bothe category sold firm to dearer.

Fanning grade sold at steady levels.

Buying Pattern:- Russian and CIS buyers continued to be fairly active along with Internal buyers. Middle east shippers lent good support on whole leaf grades and larger broken.

CTC DUST

DEMAND: - Fair demand.

MARKET: - CTC dust offer this week was at 568,304.80Kgs of which 395,462.39kgs were sold (69.59%).

Best & good teas continued to sell at irregular prices closely following quality and competition. Better medium teas at the bottom end sold steady whilst the top end eased by Rs 2 to 4 or more. Others eased by Rs 2 to 5 with bulk of the lower medium and plainer teas remaining unsold.

BUYING PATTERN: - Major blenders were very choosy. Regional and local packeteers continued to be selective. Up country buyers were subdued. Exporters to Russia, Middle east were active on blacker

ORTHODOX DUST

DEMAND: - Fair and selective demand.

MARKET: - Primary dust sold irregularly with fair amount of lots being unsold. Secondaries too sold selectively with prices easing considerably.

BUYING PATTERN: -Regional & local packateers were very selective on primary dusts. Exporters restricted at lower prices on the secondary dusts.

Courtesy - J.Thomas & Co. Pvt. Ltd.

MOMBASA /MALAWI /GUWAHATI /COCHIN /SILIGURI AUCTION

The above market report details were not available at the time of printing this publication.