TEA MARKET REPORT

SALE NO: 12

March 25 & 26, 2025

LANKA COMMODITY BROKERS LTD

LANKA COMMODITY BROKERS LTD

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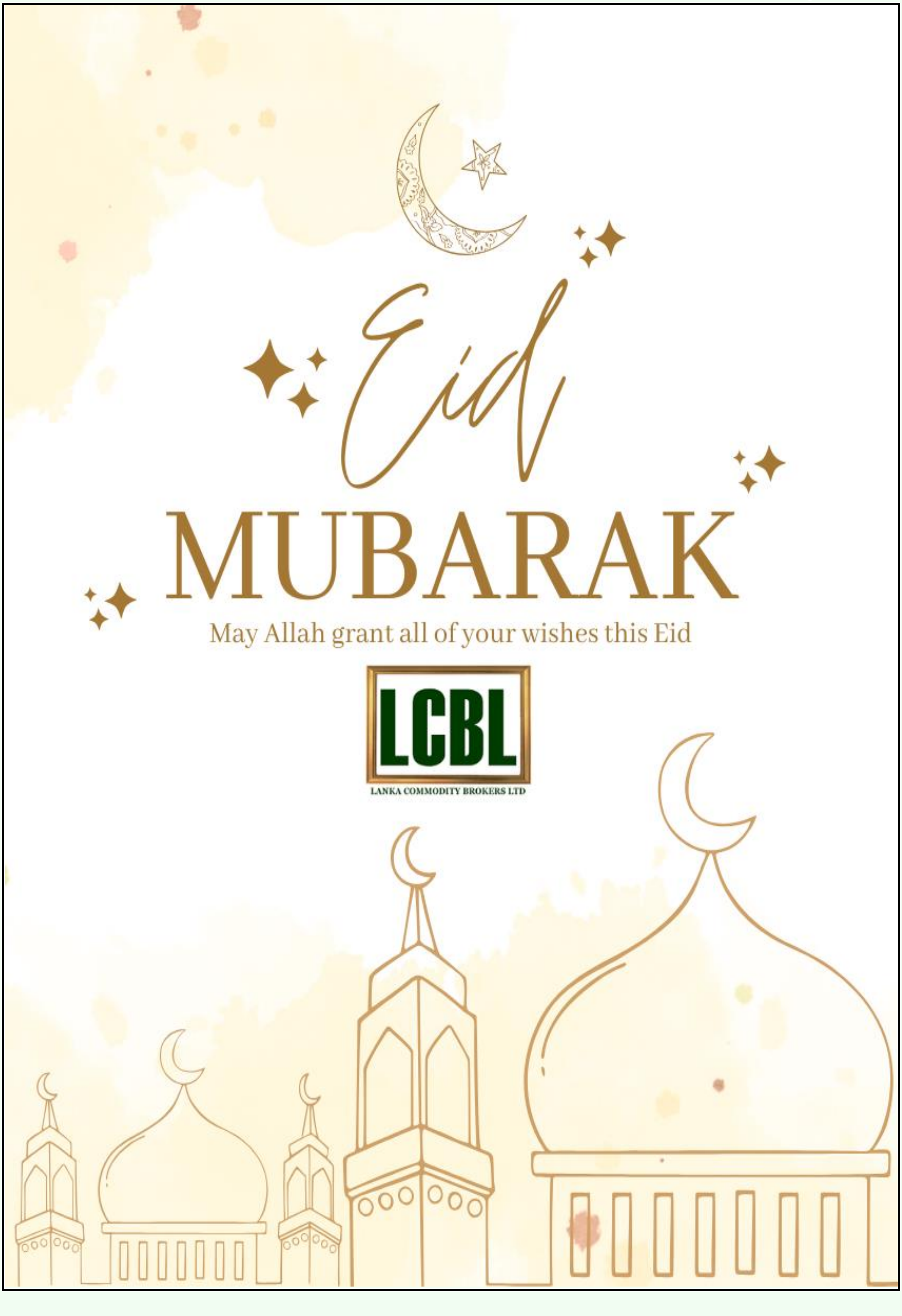
Eid
MUBARAK
May Allah grant all of your wishes this Eid
LCBL
LANKA COMMODITY BROKERS LTD

COMMENTS

This week's Tea Auction, namely Sale #12 of 2025 was held on March 25th & 26th, 2025 (Tue./Wed.). A total weight of 5.0 MKGS was on offer, which shows an increase when compared to the previous week's quantity. The Low Grown Leafy, Semi Leafy, Tippy/Small Leaf & Premium Flowery catalogues totaled 2.1MKGS, while the Main Sale High & Medium segment had 0.6 MKGS. The Ex Estate category had 0.85 MKGS.

This week's Ex-Estate sale met with less overall demand and witnessed many withdrawals. Select best high priced Western teas of last week, both BOP's/BOPF's declined substantially whilst a few select brighter BOP's sold at firm to irregular levels whilst their corresponding BOPF's declined Rs.50-100/- per kg and substantially more for teas in the higher price bracket. At the lower end, prices eased Rs.50/- per kg and more for bother BOP's/BOPF's. Nuwara Eliya's were again mostly unsold due to lack of suitable bids. Uda Pussellawa BOP's were up to Rs.100/- per kg easier whilst their corresponding BOPF's were Rs.50-100/- per kg dearer. Uva teas were firm Rs.20-40/- per kg dearer. CTC Teas – High Grown PF1's sold around last levels whilst Medium varieties tended irregular. Low Grown PF1's were firm on last levels. Seasonal teas were selectively sought after by shippers to Japan and the Continent whilst the balance were accounted for by shippers to China, Russia, CIS and select Middle-Eastern markets.

Low Grown leafy prices along with best PEK's were an easier feature this week whilst in the Small leaf category, prices tend to be firm on last levels. Bright Tippy teas continued to meet with good demand and were fully firm on last levels. Traditional buyers were active.

This week's auction comprised of 10,356 lots with a total quantity of 5,041,956kgs.

The catalogue wise breakdown was as follows:-

	Lots	Qty. (Kgs)
Low Grown Leafy	1,870	665,263
Low Grown Semi Leafy	1,498	594,031
Low Grown Tippy	1,745	795,744
High & Medium	1,456	613,764
Off Grade/BOP1A	2,041	1,027,212
Dust	527	445,848
Premium Flowery	369	49,969
Ex-Estate	850	850,125
Total	**10,356**	**5,041,956**

In Lighter Vein

""""" *Hottt Dogs..............* """""

Two Irish nuns have just arrived in USA by boat, and one says to the other, "I hear that the people in this country actually eat dogs." "Odd," her companion replies,

"but if we shall live in America, we might as well do as the Americans do."

As they sit, they hear a pushcart vendor yelling, "Hot dogs, get your dogs here," and they both walk towards the hot dog cart. "Two dogs, please!" says one. The vendor is very pleased to oblige, wraps both hot dogs in foil and hands them over. Excited, the nuns hurry to a bench and begin to unwrap their 'dogs.'

The mother superior is first to open hers. She begins to blush, and then after staring at it for a moment, leans to the other nun and in a soft brogue whispers,

"What part did you get?"

LOW GROWN TEAS

LEAFY/SEMI LEAFY

BOP1 : Select best teas were maintained whilst the best and the below best invoices declined.

OP1 : Select best and best invoices were easier by Rs.50-100/- per kg whilst the balance were tended irregular. However, stalky invoices were maintained.

OP : Teas in the best category were easier whilst the balance were maintained.

OPA : Select best invoices were irregularly dearer whilst the balance were dearer too. Poorer sorts firm to irregularly dearer.

PEK/PEK1 : Best PEK/PEK1's were maintained whilst the balance were dearer by Rs.25-50/- per kg. Teas at the lower end maintained.

Quotations (Rs./Kg)	Best		Below Best		Others	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
BOP1	**1600 -3000**	1600 -3000	**1000-1200**	1100-1300	**900-1000**	900-1100
OP1	**1600-3200**	1650-3200	**1200-1450**	1250-1500	**850-950**	850-950
OP	**1300-1600**	1300-1600	**1100-1200**	1150-1250	**950-1100**	950-1100
OPA	**1350-1850**	1300-1850	**1150-1300**	1150-1300	**950-1100**	950-1100
PEK/PEK1	**1400 - 2200**	1350 - 2250	**1100-1350**	1000-1250	**1000-1100**	1000-1100

TIPPY/SMALL LEAF

BOP/BOPSP : Select Best and Best BOP's were firm, whilst the balance were irregularly easier.

BOPF/BOPFSP : Well-made BOPF's, were easier whilst the balance sold around last levels.

FBOP/FBOP1 : Well-made FBOP's together with the cleaner Below best and cleaner teas at the lower end were firm, whilst the balance together with the bolder varieties were easier. FBOP1's in general were firm.

FBOPF/FBOPF1 : Very Tippy teas met with a good demand and were firm, whilst the Best and Below Best appreciated. Teas at the lower end were irregular. A few select best FF1's were firm, whilst the balance together with Best were easier. The cleaner Below Best and cleaner teas at the lower end sold around last levels, whilst the balance were irregular following quality.

FBOPFSP : Select best small; very Tippy teas were appreciated whilst the balance were firm to dearer.

FFEXSP/SP1 : Select best long tips appreciated whilst the others were firm to dearer.

Quotations (Rs./Kg)	Best		Below Best		Others	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
BOP/BOPSP	**1650-1850**	1600-1850	**1450-1600**	1400-1550	**1300-1400**	1250-1350
BOPF /BOPFSP	**1460-1550**	1450-1800	**1300-1400**	1300-1400	**1200-1250**	1200-1250
FBOP/FBOP1	**2000-2450**	2100-2650	**1700-1900**	1750-1950	**1550-1650**	1500-1650
FBOPF/FBOPF1	**1550-1750**	1600-1850	**1460-1500**	1450-1550	**1300-1400**	1300-1400
FBOPFSP/EXSP	**4800-5450**	4600-5000	**3100-4600**	2950-7000	**2100-3050**	1950-2900

MEDIUM GROWN LEAFY/SEMI LEAFY TEAS

FBOP : Well-made FBOP's together with cleaner below best were firm whilst the balance together with the bolder varieties were easier.

FBOPF/FBOPF1: Select best FBOPF/FBOPF1's were firm to Rs.50/- per kg dearer, whilst the balance met with an easier market.

PEK/PEK1 : Select best PEK/PEK1's were firm to Rs.100/- per kg dearer. Others in general were firm.

Quotations (Rs./Kg)	Best		Below Best		Others	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
FBOP	**1380 – 1850**	1400 – 1750	**1250 -1380**	1300 -1400	**1150 – 1250**	1180 – 1300
FBOPF/FBOPF1	**1250 – 1650**	1300 – 1650	**1100 – 1280**	1100 – 1300	**1000 – 1050**	1050 – 1100
PEK/PEK1	**1200 - 1850**	1200 - 1800	**950 - 1150**	1000 - 1200	**950 - 980**	975 - 1000

HIGH GROWNS TEAS

BOP : Best Western's – Select high-priced teas of last week were sharply lower, whilst a few select brighter sorts continued to sell at firm to irregularly easier rates. Teas in the Below Best category declined by up to Rs.100/- per kg and substantially more for the high-priced teas of last week. At the lower end, prices eased by Rs.50/- per kg and more. Nuwara Eliya's were mostly unsold. Uda Pussellawa's were up to Rs.100/- per kg easier, whilst the Uva's were firm and dearer by a similar margin following special inquiry.

BOPF: Best Western's – Select high-priced teas of last week were substantially easier, whilst the others declined by up to Rs.100/- per kg. Teas in the Below Best category declined by Rs.50-100/- per kg and substantially more for teas in the higher price bracket. At the lower end, prices were firm and Rs.20-40/- per kg easier. Nuwara Eliya's were mostly unsold. Uda Pussellawa's were up to Rs.50-100/- per kg dearer. Uva's appreciated by Rs.20-40/- per kg.

Quotations (Rs./Kg)	BOP		BOPF	
	This Week	Last Week	This Week	Last Week
Best Westerns	**1340 - 1800**	1440 – 2750	**1300 - 1480**	1440 – 1650
Below Best Westerns	**1100 - 1240**	1200 – 1380	**1180 - 1280**	1240 – 1420
Plainer Westerns	**840 - 1040**	880 – 1100	**830 - 1160**	880 – 1220
Nuwara Eliyas	**N/A**	N/A	**N/A**	1340 – 1500
Brighter UdaPussellawas	**1000 - 1080**	1040	**1100 – 1140**	1100 – 1140
Other Uda Pussellawas	**N/A**	N/A	**1000 – 1060**	1020 – 1080
Best Uva's	**1100 - 1160**	1220	**1140 – 1200**	1140 – 1180
Other Uva's	**980 - 1020**	N/A	**1020 - 1100**	1060 - 1120

MEDIUM GROWN TEAS

BOP : Leafy teas continued to sell well, whilst the others were barely steady.

BOPF : Better sorts were Rs.20/- per kg easier, whilst the others were barely steady.

Quotations (Rs./Kg)	BOP		BOPF	
	This Week	Last Week	This Week	Last Week
Best Westerns	**820 - 1600**	800 - 1550	**796 - 1180**	790 - 1180

CTC TEAS

HIGH GROWN:-

BP1 - Hardly any offerings.

PF1 - Sold around last week's levels.

MEDIUM GROWN:-

BP1/ PF1 - Irregular.

LOW GROWN:-

BP1 - Sold around last week's levels.

PF1 - Sold around last week's levels.

Quotations (Rs./Kg)	BP1		PF1	
	This Week	Last Week	This Week	Last Week
High	**N/A**	N/A	**890 – 1240**	750 – 1200
Medium	**740 – 1220**	770 – 1140	**750 – 1200**	870 – 1200
Low	**780 - 1120**	810 - 980	**790 - 1550**	820 - 1500

OFF GRADES

FGS/FGS1 : Select best Liquoring FNGS/FNGS1 were lower by Rs.25-50/- per kg whilst best teas lost Rs.20-40/- per kg ; Others firm on last. Low Grown select best FNGS/FNGS1 lost Rs.20/- per kg. Below best and poorer teas maintained last levels. Best and select best BM's advanced Rs.10-20/- per kg . Below best types too firm on last.

BOP1A : Select best BOP1A's firm on last. Best teas firm to dearer by Rs.10/- per kg. Others held firm.

QUOTATIONS (Rs./kg)	HIGH		MEDIUM		LOW	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
Good Fannings (Orthodox)	**850 – 960**	850 – 1000	**730 - 810**	730 - 830	**740 – 830**	750 – 860
Good Fannings (CTC)	**770 – 830**	770 – 880	**770 - 820**	770 - 820	**770 - 820**	770 - 820
Other Fannings (Orthodox)	**725 - 750**	725 - 750	**725 - 750**	725 - 750	**725 - 750**	725 - 750
Other Fannings (CTC)	**N/A**	N/A	**N/A**	N/A	**N/A**	N/A
Good BM's	**850 – 900**	830 – 880	**850 - 900**	850 - 880	**850 - 900**	850 - 920
Other BM's	**825 - 880**	800 - 80	**825 - 880**	800 - 840	**825 - 880**	800 - 840
Best BOP1As	**940 - 960**	900 - 920	**940 - 960**	910 - 940	**1000 – 1350**	900 – 1350
Other BOP1As	**920 - 940**	870 - 940	**850 - 940**	850 - 940	**940 – 960**	870 – 960

DUST

DUST/DUST1: High Grown liquoring DUST/DUST1's were firm on last levels whilst their secondaries and poorer types were irregular and mostly lower. Low Grown teas eased Rs.50-100/- per kg.

PD : High Grown teas declined Rs.20-40/- per kg whilst the Mid grown teas were Rs.30-50/- per kg lower. Low Growns were firm on last levels.

QUOTATIONS (Rs./kg)	HIGH		MEDIUM		LOW	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
Good Primary Dust1 (Orthodox)	**900 – 1650**	780 – 1750	**820 – 1280**	750 – 1300	**760 – 1320**	780 – 1060
Good Primary PD (CTC)	**800 – 1260**	770 – 1200	**770 – 1280**	760 – 1200	**780 – 1420**	740 – 1420
Secondary Dust	**650 - 1200**	760 - 1300	**700 - 860**	750 - 960	**720 - 920**	710 - 980

WESTERN MEDIUM

***Ancoombra**	**BOP**	**1600/-**
Craighead	BOP	1550/
***Harangalla**	**BOP**	**1500/-**
*** Uplands**	**BOPSP**	**1550/-**
***Ancoombra**	**BOPSP**	**1400/-**
***Vellai Oya**	**BOPF**	**1180/-**
***Dartry Valley**	**BOPFSP**	**1160/-**
Craighead	BOP1	1950/-
Harangalla	FBOP/FBOP1	1850/-
***Ancoombra**	**FBOP/FBOP1**	**1700/-**
Craighead	FBOP/FBOP1	1700/-
*** Hatale**	**FBOP/FBOP1**	**1600/-**
Craighead	FBOPF/FBOPF1	1650/-
***Ancoombra**	**FBOPF/FBOPF1**	**1600/-**
*** Harangalla**	**FBOPF/FBOPF1**	**1600/-**
Menikdiwela Tea	OP/OPA	1340/-
***Ingurugala**	**OP/OPA**	**1320/-**
***Orange Field**	**OP/OPA**	**1300/-**
***Meezan**	**OP/OPA**	**1300/-**
***Elkaduwa**	**OP/OPA**	**1300/-**
Harangalla	OP1	1800/-
*** Ingurugala**	**OP1**	**1550/-**
Dartry Valley	PEK/PEK1	1850/-
***Harangalla**	**PEK/PEK1**	**1800/-**
Uplands	PEK/PEK1	1800/-
Green Wood	PEK/PEK1	1800/-

WESTERN HIGH

Robgill	BOP	1800/-
Kotiyagalla	BOPSP	1750/-
Norwood	BOPSP	1750/-
Robgill	BOPF/BOPFSP	1480/-
St. Andrews	BOP1	1480/-
Bogahawatte	BOP1	1480/-
Bambrakelly	FBOP/FBOP1	1600/-
Inverness	FBOP/FBOP1	1600/-
Bogahawatte	FBOPF/FBOPF1	1300/-
Venture	OP/OPA	1320/-
Venture	OP1	1400/-
Frotoft Super	PEK/PEK1	1650/-

NUWARA ELIYA

Kenmare	BOP	1060/-
Kenmare	FBOP/FBOP1	1400/-
Court lodge	FBOPF/FBOPF1	1300/-
Court lodge	OP/OPA	1260/-
Kenmare	OP/OPA	1260/-
Kenmare	OP1	1440/-
Court lodge	PEK/PEK1	1360/-

Dust

Labookellie	DUST	1200/-
Mattakelle	DUST1	1650/-
Ceciliyan CTC	PD	1420/-

UVA MEDIUM

***Roseland Uva**	**BOP**	**1360/-**
***Roseland Uva**	**BOP**	**1320/-**
Aruna Passara	BOP	1320/-
Tinioya	BOP	1320/-
***Roseland Uva**	**BOP**	**1300/-**
Hindagala	BOPSP	1280/-
Dickwella	BOPF/BOPFSP	1380/-
Dickwella	BOP1	1750/-
*** Halpewatta Uva**	**BOP1**	**1600/-**
Sarnia Plaiderie	BOP1	1600/-
***Roseland Uva**	**BOP1**	**1550/-**
***Roseland Uva**	**FBOP/FBOP1**	**1800/-**
Telebedde	FBOPF/FBOPF1	1650/-
***Roseland Uva**	**FBOPF/FBOPF1**	**1480/-**
***Roseland Uva**	**FBOPF/FBOPF1**	**1440/-**
*** Halpewatta Uva**	**OP/OPA**	**1360/-**
Dickwella	OP/OPA	1360/-
Uva Samovar	OP/OPA	1360/-
Telebedde	OP1	2000/-
Halpewatta Uva	PEK/PEK1	1750/-
Sarnia Plaiderie	PEK/PEK1	1750/-

UVA HIGH

Nayabedde	BOP	1160/-
Craig	BOPSP	1220/-
Nayabedde	BOPF/BOPFSP	1200/-
Gonamotawa	BOP1	1800/-
Uva highlands	FBOP/FBOP1	1550/-
Glenanore	FBOPF/FBOPF1	1440/-
Spring Valley	OP/OPA	1420/-
Ellathota Uva	OP1	1800/-
Mount Uva	PEK/PEK1	1600/-
Gonamotawa	PEK/PEK1	1600/-

UDAPUSSELLAWA

Kirklees	BOP	1080/-
Kirklees	BOPSP	1100/-
Ragalla	BOPF/BOPFSP	1140/-
***Delmar**	**FBOP/FBOP1**	**1550/-**
Delmar	FBOPF/FBOPF1	1380/-
Delmar	OP/OPA	1360/-
***Delmar**	**OP/OPA**	**1300/-**
Delmar	OP1	1700/-
***Delmar**	**PEK/PEK1**	**1420/-**

OFF GRADES

Suwishka	BP	1360/-
Strathdon CTC	PF	920/-
***Chandrika CTC**	**PF**	**830/-**
***Meezan CTC**	**PF**	**830/-**
Gunawardana	BM	1080/-
Great Western	FNGS/FNGS1	1120/-
***Chandrika Estate**	**BOP1A**	**1380/-**
Aldora	BOP1A	1380/-
Chandrika Estate	BOP1A	1360/-
***Aldora**	**BOP1A**	**1340/-**

LOW GROWN LEAFY GRADES

Pothotuwa	BOP1	3000/-
Pothotuwa	OP1	3200/-
Lucky Dais	OP	1700/-
Green Lanka	OP	1600/-
***Makandura**	**OP**	**1550/-**
***Katandola**	**OP**	**1550/-**
Liyonta	OPA	1950/-
Pasgoda SH	PEKOE	2150/-
***Ganganee**	**PEKOE**	**2050/-**
***Green House**	**PEKOE**	**1900/-**
Galatara	PEKOE1	2200/-
Nilgiri	PEKOE1	2200/-
Hedigalla	PEKOE1	2150/-
***Andaradeniya Super**	**PEKOE1**	**2100/-**

LOW GROWN TIPPY GRADES

***Mahaliyadda**	**BOP**	**1850/-**
Mulatiyana Hills	BOP	1800/-
Gangalagamuwa S	BOP	1800/-
***Wattahena**	**BOP**	**1750/-**
***Andaradeniya S**	**BOPSP**	**1650/-**
Ceciliyan	BOPSP	1600/-
***Aigburth**	**BOPSP**	**1550/-**
Rajjuruwatte Super	BOPF	1550/-
Ceciliyan	BOPF	1500/-
***Sithaka**	**BOPF**	**1480/-**
***Greenwin Super**	**BOPFSP**	**1500/-**
***Ganganee**	**BOPA**	**1950/-**
Hedigalla	BOPA	1950/-
Kings Bru	BOPA	1950/-
***Elaine Super**	**BOPA**	**1850/-**
***Sithaka**	**FBOP**	**2450/-**
Pothotuwa	FBOP	2450/-
Kollonna Super	FBOP1	2000/-
Nawagamuwahena	FBOPF	1950/-
Danawala	FBOPF	1900/-
***Sithaka**	**FBOPF**	**1800/-**
***New Laksakanda**	**FBOPF**	**1800/-**
Adams View	FBOPF1	1750/-
Pothotuwa	FBOPF1	1750/-

PREMIUM FLOWERY

***Greewin Super**	**FBOPFSP**	**5000/-**
Lions	FBOPFEXSP	5450/-
Madampe Super	FBOPFEXSP1	5350/-
***New Marakanda**	**FBOPFEXSP1**	**4100/-**

CTC TEAS

HIGH GROWN

Mount Vernon CTC	PF1	840/-
Dunsinane CTC	PF1	1240/-

MEDIUM GROWN

New Peacock CTC	BP1	1220/-
***New Peacock CTC**	**PF1**	**1200/-**
***New Peacock CTC**	**PF1**	**1180/-**

LOW GROWN

Ceciliyan CTC	BP1	1120/-
Hingalgoda CTC	PF1	1550/-
***Kalubowityana CTC**	**PF1**	**1500/-**

COLOMBO AUCTION – WEEKLY GROSS SALE AVERAGES

SALE NO.11 OF 19TH MARCH, 2025

	2025			2024	
	Weekly	Month to Date	Year to Date	Weekly	Year to Date
Uva High Grown	1,098.38	1,093.24	1,043.97	1,237.12	1,085.24
Western High Grown	1,170.68	1,189.73	1,157.32	1,324.09	1,181.79
High Grown	1,154.94	1,168.62	1,125.66	1,301.48	1,158.61
Uva Medium	1,159.52	1,135.54	1,076.03	1,270.67	1,154.65
Western Medium	1,044.63	1,039.51	1,034.41	1,193.48	1,123.95
Medium Grown	1,070.43	1,059.23	1,046.59	1,217.44	1,132.47
Low Grown (Orthodox)	1,266.96	1,266.99	1,273.22	1,416.66	1,429.18
Combined L.G. (Orthodox + CTC)	1,256.75	1,247.47	1,260.45	1,387.82	1,403.44
Total	1,202.97	1,198.70	1,199.43	1,338.76	1,311.63

Private Sale Figures (17.03.2025 – 22.03.2025) - 273,946.00 kgs

Cumulative - 2,540,128.95 kgs

DETAILS OF TEAS AWAITING SALE

	Sale of 01st /02nd April '25		Sale of 07th /08th April '25	
	Lots	Qty. (Kgs)	Lots	Qty. (Kgs)
Low Grown Leafy	1,988	749,576	1,897	693,089
Low Grown Semi Leafy	1,515	629,225	1,389	562,309
Low Grown Tippy	1,888	879,635	1,683	779,107
High & Medium	1,764	770,398	1,724	783,533
Off Grade/BOP1A	2,405	1,183,712	2,103	1,025,923
Dust	573	489,801	530	451,983
Premium Flowery	345	51,521	301	40,900
Ex-Estate	817	796,927	814	797,462
Total	**11,295**	**5,550,795**	**10,441**	**5,134,306**

FUTURE CATALOGUES CLOSURE

Sale No.15 of 22nd/23rd April, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **27th Mar., 2025 at 04.30 p.m.**

Sale No.16 of 28th/29th April, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **03rd Apr., 2025 at 04.30 p.m.**

Sale No.17 of 06th/07th May, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **10th Apr., 2025 at 04.30 p.m.**

SALE NO. 13

AUCTION OF 01st/02nd APRIL, 2025

BROKERS' SELLING ORDER

Leafy/Semi Leafy/Tippy/BOP1A/ Premium Flowery	High & Medium/ Off Grades/Dust	Ex-Estate
1. Forbes & Walker Tea Brokers (Pvt) Ltd	1. **Lanka Commodity Brokers Ltd**	1. Asia Siyaka Commodities PLC
2. Asia Siyaka Commodities PLC	2. Bartleet Produce Marketing (Pvt) Ltd	2. Forbes & Walker Tea Brokers (Pvt) Ltd
3. Eastern Brokers PLC	3. Forbes & Walker Tea Brokers (Pvt) Ltd	3. Mercantile Produce Brokers (Pvt) Ltd
4. Ceylon Tea Brokers PLC	4. Mercantile Produce Brokers (Pvt) Ltd	4. Eastern Brokers PLC
5. John Keells PLC	5. Asia Siyaka Commodities PLC	5. John Keells PLC
6. **Lanka Commodity Brokers Ltd**	6. John Keells PLC	6. Bartleet Produce Marketing (Pvt) Ltd
7. Bartleet Produce Marketing (Pvt) Ltd	7. Eastern Brokers PLC	7. Ceylon Tea Brokers PLC
8. Mercantile Produce Brokers (Pvt) Ltd	8. Ceylon Tea Brokers PLC	8. **Lanka Commodity Brokers Ltd**

Crop & Weather

For the period 18th to 24th March, 2025

Western/Nuwara Eliya Regions:-

The Nuwara Eliya and Western Regions reported bright mornings and evening showers. The Department of Meteorology expects showers in the Western Region in the week ahead.

Uva/ Udapussellawa Regions:-

Sunny weather conditions and isolated showers were reported in the Uva and Uda Pussellawa regions throughout the week. According to the Department of Meteorology, showers are expected in the Uva Region in the week ahead.

Low Growns:-

Bright mornings and evening showers were reported in the Low Grown Region throughout the week. Fairly heavy showers are expected in the Low Grown Region in the week ahead according to the Department of Meteorology.

Crop Intake:-

The Nuwara Eliya, Uva, Udapussellawa and Low Grown regions showed an increase in the crop intake, whilst the Western Region maintained.

WORLD CROP STATISTICS (MKGS)

Country	Month	2024	2025	Difference +/-	To-date 2024	To-date 2025	Difference +/-
SRI LANKA	**Feb.**	**20.07**	**15.60**	**-4.47**	**38.62**	**37.16**	**-1.46**

Country	Month	2023	2024	Difference +/-	To-date 2023	To-date 2024	Difference +/-
BANGLADESH	Dec.	7.79	6.37	-1.42	102.95	93.04	-9.91
KENYA	Oct.	52.78	50.06	-2.72	465.01	495.23	30.2
MALAWI	Nov.	2.70	3.20	0.50	39.30	44.80	5.5
NORTH INDIA	Dec.	66.30	11.10	-55.20	1157.00	1057.98	-99.02
SOUTH INDIA	Dec.	18.12	18.30	0.18	236.68	226.80	-9.88

"Africa Tea Brokers Bulletin of Statistic

OTHER MARKETS

LIMBE MARKET REPORT SALE 13 HELD ON 26/03/2025

There was less enquiry at firm rates where sold for the 5040 packages on offer.

BP1 tended firm to 5USC easier.

PF1 held firm on last where sold.

D1 were fully firm on last.

PF1SC met selective interest at firm rates where sold.

Secondaries held firm where sold.

WEATHER/CROP FOR THE WEEK ENDING 23RD MARCH, 2025

There was scattered and reduced rainfall activities this week, particularly towards the end of the week.

Green leaf intakes were steady.

BANGLADESH AUCTION

SALE NO. 46 OF MONDAY 24TH MARCH, 2025

CTC LEAF :- 44,759 packages of tea met a restricted demand.

BROKENS/ FANNINGS:- A handful of clean liquoring teas on offer met with a fairly good demand and sold at around last levels. All other varieties witnessed much less demand and were subjected to heavy withdrawals. BLF teas were again difficult of sale and withdrawals were heavier.

DUST:- 2,965 packages of tea on offer met with a fair demand. A select few clean liquoring Dusts sold well at slightly easier rates. Remainder, mostly reprinted saw only limited demand with heavy withdrawals. Blenders lent fair support with improved interest from the loose tea buyers.

COMMENTS : This week's sale witnessed a much weaker demand with only a few buyers operating in the sale. A few clean lines sold quite well but the remainder were withdrawn without any bids. The only interest in this sale emanated from a few Blenders.

Dusts sold well.

Quotations – This Week – (In Taka)

Brokens	This Week	Last Week	Fannings	This Week	Last Week	Dust	This Week	Last Week
Best	**210-220N**	215-225N	**Best**	**210 -220N**	215 -225N	**PD**	**175-225**	165-238
Good	**190-200N**	200-210N	**Good**	**190-200N**	200-210N	**RD**	**160-225**	160-269
Medium	**170-180**	170-180	**Medium**	**170-180**	170-180	**D**	**200-260**	160-260
Plain	**160-165**	160-165	**Plain**	**160-165**	160-165	**CD**	**330**	225-288
BLF	**160 Nom**	160 Nom	**BLF**	**160 Nom**	160 Nom	**BLF**	**160**	160

COURTESY: NATIONAL BROKERS LTD

SOUTH INDIAN ROUNDUP

FOR THE WEEK ENDING –22ND MARCH, 2025

KOCHI

CTC LEAF

Demand : Fair Demand. Limited quantity of all grades sold at steady levels.

ORTHODOX LEAF

Demand : Good demand.

Buying Pattern : Cleaner well made and blacker. Whole leave sold irregularly around last levels. Tippy grades were being appreciated in value depended on quality. Brokens and fannings were fully firm.

Market : CIS & Middle East Buyers operated.

DUST

Demand : Good Demand.

Buying Pattern : Popular marks and better medium sorts sold at an easier note by Rs.1 to 2. Medium and plainer sorts sold irregularly and lower by Rs. 1 to 2.

Market : Major Packeteers and exporters were active, internal buyers purchased cautiously.

COONOOR

CTC LEAF

Demand : Fairly strong.

Market : Easier trend continued this week too in spite of a good general demand across all grades and categories by Rs.1/- to 2/- and more on the brighter liquoring teas. However the fairly blacker and cleaner fannings have traded at firm to dearer levels.

The overall sale percentage was 88.82% at an average of Rs.114.74

Buying Pattern: The major blenders have absorbed the maximum quantity on the brokens whilst the internal was lending some support. The exporters have mainly confined to the larger brokens and on the fannings.

ORTH LEAF

Demand : Strong.

Market : The general market was fully firm to dearer on the fairly cleaner brokens and on the fannings by Rs.3/- to Rs.5/-The whole leaves were rather irregular and mostly easier with few popular cleaner Op's have sold at fully firm to dearer or maintained at last levels.

The overall sale percentage was 98.92% at an average of Rs. 166.13

Buying Pattern: Fairly strong export enquiry was forthcoming with CIS and middle East buyers operating whilst the internal was lending some support.

CTC DUST

Demand : Strong.

Market : The market was tending steady to firm and occasionally dearer on the medium bolder dust grades. However the finer dust grades have gained momentum with strong enquiry to have traded at fully firm to dearer levels across all categories.The sale had also witnessed some select lines of premium teas crossing Rs.300 plus to ascertain the unique quality of the Nilgiris.

The overall sale percentage was 93.69 % at an average of Rs. 121.70

Buying Pattern: Stronger export enquiry was forthcoming with SSK exports being active. HUL was seen rendering fairly good support by absorbing mainly the smaller dust grades of the fairly brighter teas. As usual M/s Anjaneya Enterprises (Devagiri) continued their buying on the high priced brighter liquoring teas.

ORTH DUST

Demand : Strong.

Market: An irregular market with the common medium primary dust grades were fully firm to dearer with some of the colonels. However the popular primary dust grades were rather irregular and mostly lower. The secondarys and terrtiaries were also witnessed an easier trend by losing out Rs. 2/- to Rs.3/- and upto Rs.10/-comparatively.

The overall sale percentage was 98.82% at an average of Rs. 128.78

Buying Pattern: Fairly good internal enquiry was forthcoming with M/s Anjaneya enterprises (Devagiri Tea co) was seen absorbing the primary grades whilst the export was operating on the secondaries and tertiaries.

COIMBATORE

CTC LEAF

Demand : Fair general demand.

Market : Better medium teas were barely steady with some withdrawals, however PF grades were firm to dearer. Medium teas were lower by Re.1/- to Rs.2/- with few withdrawals. Plainer teas were lower by Rs.2/- to Rs.3/- on bolder grades. Others barely steady.

Buying Pattern : Blenders, packeteers and exporters were active. Internal selective.

ORTH LEAF

Demand : Good demand.

Market : Whole leaf were steady. Well made brokens were dearer by Rs.5/- to Rs.10/-. Others not quotable.

Buying Pattern : Exporters were active.

CTC DUST

Demand : Good general demand.

Market : Better medium and popular sorts were barely steady to lower by Re.1/- to Rs.2/-. As sale progressed the bolder grades were fully firm to occasionally dearer by Re.1/- to Rs.2/-. Medium teas were irregular and lower by Re.1/- to Rs.2/- with some withdrawals. Plainer teas were lower by Re.1/- with few withdrawals.

Buying Pattern : All sections were selective.

ORTH DUST

Demand : Fair demand.

Market : Lower by Rs.2/- to Rs.3/- with few withdrawals.

Buying Pattern : Exporters were active.

MOMBASA TEA AUCTION MARKET REPORT

Sale No.11 of 17TH & 18TH MARCH, 2025

Good general demand prevailed for the 192,918 packages (12,990,392.00 kilos) available in the market with 26.67% remaining unsold.

OFFERINGS:

Leaf Grades - 111,160 packages (7,342,641.00 kilos) – 56.39% unsold.
Dust Grades - 60,440 packages (4,533,607.00 kilos) – 13.85% unsold.
Secondary Grades - 21,318 packages (1,114,144.00 kilos) – 9.28% unsold.

MARKETS:

Pakistan Packers, Yemen and **other Middle Eastern countries** were active but at lower levels while **Afghanistan** and **Bazaar** showed some support. **Egyptian Packers** and **UK** maintained enquiry but at lower rates while **Kazakhstan, other CIS states** and **Russia** were less active. **Sudan** were absent while **Local Packers** were operating. **Somalia** maintained interest at the lower end of the market.

LEAF GRADES (M2 & M3)

BP1:

Best – Saw irregular interest at mostly easier levels and lost up to USC66 but a few lines were up to USC8 above last levels.
Brighter – Were up to USC27 below previous rates.
Mediums – KTDA mediums shed up to USC25 with plantation mediums discounted by up to USC24 but some invoices were up to USC12 dearer.
Lower Medium – Mostly easier by up to USC17.
Plainer – Less support and shed up to USC17.

PF1:

Best – Met irregular enquiry ranging between firm to USC12 dearer to easier by a similar margin with some teas discounted by up to USC34.
Brighter – Saw irregular interest and varied between steady to mostly dearer by up to USC11 to easier by up to USC7.
Mediums – KTDA mediums were irregular ranging between firm to USC24 dearer to easier by up to USC21 with plantation mediums irregularly discounted by up to USC29.
Lower Medium – Saw some teas gaining by USC14 to mostly easier by up to USC12.
Plainer – Firm to USC10 dearer to easier by up to USC11.

CTC QUOTATIONS	BP1 – USC	PF1 – USC
Best	267 – 334	296 – 404
Good	264 – 328	272– 324
Good Medium	224 – 290	274 – 318
Medium (KTDA)	144 – 205	148 – 274
Medium (Plantations)	140– 196	146 – 210
Lower Medium	130 – 151	122 – 165
Plainer	096 – 135	081 – 133

DUST GRADES (M1)

PDUST:

Best – Were irregularly easier by USC25 with some teas up to USC52 below previous levels.
Brighter – Were up to USC21 easier.
Mediums – KTDA mediums saw irregular and mostly easier interest shedding up to USC19 while plantation mediums lost USC20 with some teas discounted by up to USC36.
Lower Medium – Mostly lost up to USC22 but some invoices were USC7 above last rates.
Plainer – Steady to USC6 dearer to easier by up to USC10.

DUST1:

Best – Saw irregular enquiry ranging between firm to USC6 dearer to mostly easier by up to USC16.
Brighter – Varied between mostly easier by up to USC16 with some lines steady while others were up to USC18 dearer.
Mediums – KTDA mediums shed up to USC14 with plantation mediums discounted by up to USC11.
Lower Medium – Irregular and varied between USC6 dearer to easier by up to USC13.
Plainer – Irregular and ranged between mostly easier by up to USC8 but some lines appreciated by up to USC15.

CTC QUOTATIONS	BP1 – USC	PF1 – USC
Best	270 – 374	267 – 352
Good	267– 300	260 – 303
Good Medium	260 – 320	260 – 304
Medium (KTDA)	142 – 264	140– 258
Medium (Plantations)	178 – 255	175 – 205
Lower Medium	117 – 182	122 – 172
Plainer	090 – 146	090 – 139

SECONDARY GRADES (S1)

In the Secondary Catalogues, best **BPs** eased while others were firm with **PFs** generally steady. Clean well sorted coloury **Fannings** held value with **similar DUSTs** firm. **Other Fannings** saw irregular and easier absorption while **DUSTs** held value. **BMFs** were readily absorbed.

SECONDARY QUOTATIONS (USC)	BP / BP2	PF / PF2	FNGS1 / FNGS	DUST / DUST2	BMF
Best / Good	175 – 261	188 – 190	130 – 239	108 –274	090
Good Medium / Medium	-	-	125– 162	100 – 188	-
Lower Medium	110 – 148	114 – 138	105 – 136	074 – 128	078 – 100
Plainer	098 – 141	080 – 119	084 – 106	084 – 098	076 – 086

March 26, 2025
-/tp.

International Tea News

Tea plantations intrinsic to Assam's socio-economic stability

Tea plantations intrinsic to Assam's socio-economic stability Tea plantations in Assam have played a crucial role in shaping the region's socio-economic landscape for over two centuries. With Assam Tea being globally recognized, the industry faces challenges today that threaten its sustainability and the livelihoods of millions

In 2023, Assam Tea completed 200 years. Although the Singpho tribe of Arunachal Pradesh have been drinking the brew made from the Camellia Sinensis plant since ancient times, the tea plant as we know it today was discovered in Assam in 1823 by Robert Bruce. The first tea garden in Assam was started in 1833. Since then, tea gardens have grown rapidly in Assam, necessitating infrastructure development that has helped open up this remote region to the world. In two centuries, Assam Tea, with its strong body and colour, has become globally famous. Assam Tea accounts for 23 per cent of the world's total tea output and 60 per cent of India's tea production. Besides contributing to State revenues, the export of Assam Tea is a major foreign exchange earner for the country. Even though today the focus is on sunrise industries like semiconductors, renewable energy, Artificial Intelligence, etc, tea remains the backbone of Assam's predominantly agricultural economy.

There are more than 850 tea gardens in Assam. Initially, most of the tea gardens were owned by British/European companies, with a few belonging to native persons. The early planters were hardy pioneers with a futuristic vision. They transformed a primitive agricultural economy into a plantation-based economy capable of competing in the global tea trade. Till about 1900, 96 per cent of tea consumed in the UK was from China and only 4 per cent from India. By 1920, 60 per cent of the tea imported by the UK was from India, and the lion's share was from Assam. This was possible because the tea sector underwent many progressive changes during this period.

The first significant change came around 1896 with the invention of tea rolling and drying machines. This introduced mechanization in black tea manufacturing, reducing the cost of production, increasing output and improving quality. In 1911, the Tocklai Tea Research Institute was established to conduct research and develop all aspects of tea cultivation and processing. In 1930, the innovation of the CTC machine in Assam brought a paradigm shift in tea processing and consumer tastes from orthodox to CTC varieties. By the 1950s, Assam CTC tea, with its dark colour and strong flavour, dominated the markets. As the tea gardens expanded/prospered, Assam's GDP and per capita income grew. By 1951, Assam had the second-highest per capita income in the country.

However, post-independence, a change in the ownership pattern of tea gardens from British/European companies to Indian businessmen altered management and tea culture practices. The entrepreneurial, progressive approach was replaced by more commercial considerations. The new approach focused more on short-term gains rather than sustainability and development. Tea gardens suffered. Tea is an agro-based industry, which requires timely inputs and investments for the rejuvenation/replacement of ageing tea bushes and maintenance/upgrading of plants and machinery.

Today, structural weaknesses are inherent in the Assam gardens. More than 30 per cent of the acreage under tea is above the economic threshold age limit. Poor management, compromise in standard tea culture practices, outdated factory set-up, diversion of funds with negligible fresh investment by inexperienced owners, over-dependence on bank loans, etc, have resulted in the neglect of tea gardens, impacting financial sustainability and development. Competition from other tea-producing nations in the domestic and international markets for cheaper teas has deepened the crisis. The deteriorating conditions of the tea gardens have strained management/worker relations, causing labour unrest.

Tea plantations are labour-intensive and dependent on cheap labour to be cost-effective. In the colonial era, cheap indentured labour was brought from Central India and parts of Bengal and Bihar. This was primarily responsible for the exploitative work practices in the tea gardens. Even today, plantation workers endure a rigorous work schedule and live in poor, unhygienic conditions with limited access to basic amenities, education and healthcare. However, with the unionization of plantation workers, such practices/conditions have been increasingly challenged. The political mobilization of the tea garden community has added another dimension to plantation economics. Government's policy of unilaterally hiking wages to win votes has upset the already precarious cost-revenue equation of tea estates.

The present crisis in the tea industry is due to shortsighted policies that prioritized short-term gains instead of long-term sustainability and development. To combat climate change, regenerative agriculture that revitalizes the soil, improves the health of tea bushes, reduces chemical inputs and enhances bio-diversity is needed in tea gardens. The annual recommended rate of uprooting and replanting of old bushes with infilling of vacancies is essential to maintain the economic age limit threshold for better yield and quality. Standard tea-culture practices must not be compromised; factories must be properly maintained with timely upgrading of machinery, and owners must be willing to invest in new agri-technology to achieve sustainable development.

Labour wages, a critical factor, account for 60 per cent of production expenses. Another 10 per cent is added to the expenses for providing facilities like subsidized grains, housing, firewood, medical supplies, and education. This is higher than in other labour-intensive sectors, where wages account for 50 per cent of production costs. For the financial sustainability of tea gardens, a system of productivity-linked wages must be explored. It is also necessary to skill workers in regenerative agriculture practices, modern tea cultivation techniques, quality control, water management, soil and environmental conservation methods, entrepreneurship etc. At the same time, the government should bring the non-cash benefits given to the workers under its various welfare schemes to improve their living conditions and ease the burden on owners.

The tea gardens in Assam employ 15 lakh people, which is 17 per cent of the State's workforce. The multi-ethnic and multi-cultural tea community, which has worked in the tea gardens for generations, is today an integral part of Assam's socio-cultural fabric. Their lives and livelihoods are tied to the future of tea plantations. Another 20 per cent of Assam's population is dependent directly or indirectly on the tea sector. Moreover, there are an estimated 1.5 lakh Small Tea Growers (STGs), mainly rural unemployed youth engaged in tea cultivation. Diverting tea garden land for different mega-projects may make corporate sense, but any disruption of tea plantations or the STG sector will have serious socio-economic consequences for Assam.

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