

TEA MARKET REPORT

SALE NO: 23

June 17 & 18, 2025



LANKA COMMODITY BROKERS LTD

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COMMENTS

This week's Tea Auction, namely Sale #23 of 2025 was held on June 17th/18th, 2025 (Tue./Wed). A total weight of 6.6 MKGS was on offer, which shows a slight decrease when compared to the previous week's quantity. The Low Grown Leafy, Semi Leafy, Tippy/Small Leaf & Premium Flowery catalogues totaled 2.8 MKGS, while the Main Sale High & Medium segment had 0.9 MKGS. The Ex Estate category had 0.9 MKGS.

The current trend experienced at the Ex-Estate sale held today continues for yet another week unabated. With the exception of some select Best Western BOP/BOPF which attracted selective airmail inquiry and as such moved up over last week levels; all others witnessed a lower and easier trend with buyers following quality closely. The Majority of the Nuwara Eliya teas remained unsold for yet another week in a row due to lack of suitable offers. Uva/Udapussellawa's too declined Rs.20-40/- for most invoices. CTC Teas - Better High & Medium PF1's were barely steady whilst the other were irregularly easier up to Rs.50/- per kg. Better Low Grown PF1's held firm, but all others was Rs.20-40/- and more as a sale progressed. There were hardly any BP1's on offer this week too. The limited availability of the better teas on offer was sought after by shippers to Japan and the Continent whilst the balance was accounted by Russia, and CIS with some Middle Eastern interest.

Low Grown teas were a firmer trend, whilst PEK's too maintained on last levels. Small leaf teas were marginally easier this week whilst bright Tippy Teas were fully firm. There was fair demand from most markets.

With the escalation of the Middle East crisis, Sri Lanka tea exports to the region may be affected which in turn could have an impact on the Colombo Tea Auction prices.

This week's auction comprised of 12,419 lots with a total quantity of 6,619,959kgs.

In Lighter Vein

The catalogue wise breakdown was as follows:-

	<u>Lots</u>	<u>Qty. (Kgs)</u>	<u><i>PICNIC</i></u>
Low Grown Leafy	2,163	907,969	A bus full of housewives going on a picnic, fell into a river. ALL DIED.
Low Grown Semi Leafy	1,713	773,403	
Low Grown Tippy	2,225	1,080,468	Each husband cried for a week, but one husband continued for more than two weeks!!
High & Medium	1,870	907,059	When asked why did he miss his wife so much? He replied miserably:
Off Grade/BOP1A	2,483	1,347,882	
Dust	650	621,221	"No".
Premium Flowery	440	69,184	My wife missed the bus!!!
Ex-Estate	<u>875</u>	<u>912,773</u>	
Total	<u>12,419</u>	<u>6,619,959</u>	

LOW GROWN TEAS

LEAFY/SEMI LEAFY

BOP1 : Select best invoices were firm on last week levels whilst the balance too met with less demand.

OP1 : In general were lower.

OP : Well made OP's declined by Rs.50/- whilst the balance too eased further.

OPA : Few teas in the few select best category were maintained, whilst balance tended irregular. Poorer sorts declined substantially.

PEK/PEK1 : PEK's in general were firm. Well-made PEK1's were maintained, whilst the balance were irregularly Lower. Teas at the lower end too declined by Rs.50/-.

Quotations (Rs./Kg)	Best		Below Best		Others	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
BOP1	1300-3000	1350-3000	950-1100	1000-1150	800-950	850-1050
OP1	1500-3250	1500-3250	1050-1200	1100-1250	800 -950	800 -1000
OP	1100-1500	1100-1550	950-1000	1000-1050	850-900	900-950
OPA	1100-1600	1100-1650	950-1000	1000-1050	850-900	900-950
PEK/PEK1	1400-2500	1400-2400	1100-1200	1100-1250	900-1000	950-1050

TIPPY/SMALL LEAF

BOP/BOPSP : A selection of high-priced BOP's were firm, whilst the others declined.

BOPF/BOPFSP : BOPF's, in general, were lower.

FBOP/FBOP1 : A Few select Best invoices were firm following special inquiry, whilst the others together with Best and Below Best declined sharply. Cleaner teas at the lower end were firm, whilst the balance eased. FBOP1's in general declined.

FBOPF/FBOPF1 : Tippy teas, in general, declined substantially and remained unsold due to a lack of suitable bids, whilst the teas at the lower end were irregular. Select Best, Best and Below Best FF1's, in general, declined, whilst the teas at the lower end sold around last levels.

FBOPFSP : Tippy Teas in general, declined substantially.

FFEXSP/SP1 : Very tippy teas in general declined due to lack of suitable bids, whilst the teas at the lower end were irregular.

Quotations (Rs./Kg)	Best		Below Best		Others	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
BOP/BOPSP	1850-2300	1850-2150	1600-1800	1650-1800	1450-1550	1500-1600
BOPF /BOPFSP	1700-2010	1650-2000	1450-1650	1450-1600	1250-1400	1250-1400
FBOP/FBOP1	1900-2600	1950-2450	1700-1850	1750-1900	1550-1650	1600-1700
FBOPF/FBOPF1	1480-1900	1500-1950	1440-1550	1450-1550	1360-1420	1380-1420
FBOPFSP/EXSP	2450-2950	4200-4950	2100-2350	2800-3850	1750-2000	2350-2800

MEDIUM GROWN LEAFY/SEMI LEAFY TEAS

FBOP : Except for a few select best FBOP's, others tended irregularly lower. Teas in the below Best category declined in value. Poorer sorts too were firm to easier.

FBOPF/FBOPF1 : A few select best invoices held firm, others all declined in value fairly sharply, Teas at the lower end were firm and easier towards the close.

PEK/PEK1 : Except for a well made shotty PEKOE1 types; balance tended declining in market.

Quotations (Rs./Kg)	Best		Below Best		Others	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
FBOP	1340-2150	1350-1850	1150-1340	1200-1350	950-2150	1100-1250
FBOPF/FBOPF1	1300-1800	1380-1600	1200-1300	1250-1380	950 -1200	1000 -1250
PEK/PEK1	1300-1650	1350-1650	1050-1300	1100-1350	900-1050	1000-1100

HIGH GROWNS TEAS

BOP : Western's – A selection of teas in the Best and Below Best categories, where quality was reasonably maintained, were firm and up to Rs.50/- per kg easier, whilst the others declined further. At the lower end, clean leaf/coloury teas were selectively Rs.20-40/- per kg dearer, whilst the other were barely steady. Nuwara Eliya's were unsold due to a lack of suitable bids. Uva/Uda Pussellawa's declined by up to Rs.50/- per kg mostly following quality.

BOPF : A selection of Westerns in the Best and Below Best categories, where quality was maintained, sold around last, whilst the others declined by Rs.20-40/- per kg. At the lower end, clean leaf/coloury teas were firm, whilst the others particularly the thinner liquoring teas declined by Rs.20-40/- per kg. Nuwara Eliya's were mostly unsold due to a lack of suitable bids. Uda Pussellawa's declined by Rs.20-40/- per kg and more. Uva's – Clean leaf types were firm, whilst the others were Rs.20-40/- per kg lower.

Quotations (Rs./Kg)	BOP		BOPF	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Best Westerns	1100 - 1220	1120 - 1260	1180 - 1320	1200 - 1400
Below Best Westerns	980 - 1060	1000 - 1100	1020 - 1160	1020 - 1180
Plainer Westerns	820 - 960	860 - 980	810 - 980	810 - 1000
Nuwara Eliyas	1200	N/A	1120 -1170	N/A
Brighter UdaPussellawas	850 - 870	880 - 920	870 - 890	880 - 920
Other Uda Pussellawas	830 - 840	850 - 870	840 - 860	850 - 860
Best Uva's	1020 - 1080	1120 - 1220	1040 - 1120	1040 - 1260
Other Uva's	870 - 1000	870 - 900	900 - 1000	850 - 960

MEDIUM GROWN TEAS

BOP : Large Leaf teas were irregular and easier, whilst the others were firm and up to Rs.20/- per kg easier.

BOPF : Better teas were barely steady, whilst the other secondary types were heavily discounted and mostly unsold.

Quotations (Rs./Kg)	BOP		BOPF	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Best Westerns	880 - 1600	800 - 1700	760-1040	820-1000

CTC TEAS

HIGH GROWN:-

BP1 - Hardly any offerings.

PF1 - Better sorts declined by Rs.50/- per kg and more following quality, whilst the others were irregular.

MEDIUM GROWN:-

BP1 - Mostly unsold

PF1 - Better sorts were barely steady, whilst the others were irregular and up to Rs.50/- per kg easier.

LOW GROWN:-

BP1 - Irregular and hardly any offerings.

PF1 - A few select invoices were firm following special inquiry, whilst the others which commenced firm and Rs.20/- per kg easier, declined further as the sale progressed.

Quotations (Rs./Kg)	BP1		PF1	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
High	N/A	N/A	840-1100	860-1140
Medium	690-1000	700-1220	750-1100	750-1080
Low	730-1200	820-1260	730-1440	720-1480

OFF GRADES

FGS/FGS1 : Select best FNGS/FNGS1 firm to easier by Rs.20-40/- per kg. . Others lost Rs.20-40/-. Low Grown select best FNGS/FNGS1 firm on last. Below best and poorer teas however appreciated Rs.20/- per kg and select best BM's lost Rs.40/-. Best and Below best types lost Rs.40-50/-easier.

BOP1A : Select best BOP1A's held firm. Best teas and others were firm to easier by Rs.20/- per kg.

QUOTATIONS (Rs./kg)	HIGH		MEDIUM		LOW	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Good Fannings (Orthodox)	800-850	800-880	780-830	770-820	800-870	800-850
Good Fannings (CTC)	780-820	780-820	750-830	750-820	770-870	770-850
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	830-860	870-890	820-850	860-880	820-870	850-930
Other BM's	800-820	840-870	800-820	840-870	780-820	830-870
Best BOP1As	900-910	900-920	900-910	900-930	1100-1400	1100-1400
Other BOP1As	860-880	870-890	850-880	870-890	850-880	870-910

DUST

DUST/DUST1: High Grown liquoring Dust/Dust.1's eased Rs.30-50/- per kg whilst, their secondaries and poorer types too irregularly lower. Mid Grown teas too lost to a similar margin and Low Growns however were firm on last levels.

PD : High Growns together with Mid grown eased Rs.40-60/-, whilst Low growns were irregularly lower by Rs.20-30/-

QUOTATIONS (Rs./kg)	HIGH		MEDIUM		LOW	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Good Primary Dust1 (Orthodox)	840 -1600	830 -1700	800 - 1140	780 - 1160	810-1400	800-1380
Good Primary PD (CTC)	780 - 1080	800 - 1120	780 - 1000	760 - 1140	790 - 1400	780 - 1380
Secondary Dust	770 - 920	770 - 940	760 - 810	750 - 900	800 - 920	820 - 920

WESTERN MEDIUM

*Harangalla	BOP	1600/-
*Ancoombra	BOP	1500/-
*Hatale	BOP	1360/-
*Hatale	BOPSP	1260/-
Vellai Oya	BOPF/BOPFSP	1000/-
Dartry Valley	BOP1	2050/-
Craighead	FBOP/FBOP1	2150/-
Craighead	FBOPF/FBOPF1	1800/-
*Meezan	OP/OPA	1200/-
*Hatale	OP1	1500/-
*Galgewatta	OP1	1500/-
*Meezan	OP1	1460/-
*Meezan	PEK/PEK1	1650/-
Harangalla	PEK/PEK1	1650/-
*Meezan	PEK/PEK1	1600/-
Dartry Valley	PEK/PEK1	1600/-

WESTERN HIGH

Great Western	BOP	1220/-
Queensberry	BOPSP	1300/-
Alton	BOPF/BOPFSP	1320/-
Torrington	BOP1	1700/-
Bambrakelly	FBOP/FBOP1	1420/-
Glenloch	FBOP/FBOP1	1420/-
Fairlawn	FBOPF/FBOPF1	1500/-
Venture	OP/OPA	1060/-
St.Andrews	OP/OPA	1060/-
Venture	OP1	1260/-
Fairlawn	PEK/PEK1	1550/-

NUWARA ELIYA

Lovers Leap	BOPF/BOPFSP	1120/-
Kenmare	BOP1	1060/-
Kenmare	FBOP/FBOP1	1260/-
Court Lodge	OP/OPA	980/-
Kenmare	PEK/PEK1	1140/-

CTC TEAS**HIGH GROWN**

Dunsinane CTC	PF1	1100/-
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MEDIUM GROWN

Rothschild CTC	BP1	1000/-
New Peacock CTC	PF1	1100/-

LOW GROWN

Ceciliyan CTC	BP1	1200/-
Kalubowitiyana CTC	PF1	1440/-

UVA MEDIUM

*Roseland Uva	BOP	1300/-
Aruna Passara	BOP	1300/-
Uva Samovar	BOPSP	1240/-
Dickwella	BOPF/BOPFSP	1460/-
Sarnia Plaiderie	BOP1	1950/-
Dickwella	FBOP/FBOP1	1700/-
Sarnia Plaiderie	FBOPF/FBOPF1	1460/-
Sarnia Plaiderie	OP/OPA	1160/-
Telebedde	OP1	1500/-
Uva Samovar	OP1	1500/-
*Roseland Uva	OP1	1460/-
Sarnia Plaiderie	PEK/PEK1	1550/-
Dickwella	PEK/PEK1	1550/-
Aruna Passara	PEK/PEK1	1550/-

UVA HIGH

Pitaratmalie	BOP	1080/-
Gonamotawa	BOPSP	1360/-
Nayabedde	BOPF/BOPFSP	1120/-
Glenanore	BOP1	1750/-
Gonamotawa	FBOP/FBOP1	1500/-
Uva Highlands	FBOP/FBOP1	1500/-
Glenanore	FBOPF/FBOPF1	1420/-
Mount Uva	OP/OPA	1220/-
Ellathota Uva	OP1	1480/-
Gonamotawa	PEK/PEK1	1500/-

UDAPUSSELLAWA

Kirklees	BOP	850/-
Luckyland	BOP	850/-
Kirklees	BOPSP	830/-
Luckyland	BOPSP	830/-
Luckyland	BOPF/BOPFSP	890/-
Kirklees	BOPF/BOPFSP	890/-
Delmar	BOP1	1750/-
*Delmar	FBOP/FBOP1	1380/-
Delmar	FBOPF/FBOPF1	1240/-
Delmar	OP/OPA	1240/-
*Delmar	OP1	1550/-
*Delmar	PEK/PEK1	1360/-

OFF GRADES

Adams View	BP	1200/-
*Kothmale Hills	BP	1120/-
Chandrika Estate	BP	1120/-
Lioynta CTC	PF	940/-
*Chandrika Estate	PF	860/-
Wilchena	BM	1180/-
Wattegodde	FNGS/FNGS1	1020/-
Chandika Estate	BOPIA	1340/-
*Aldora	BOPIA	1140/-

LOW GROWN LEAFY GRADES

Pothotuwa	BOP1	3000/-
*Makandura	BOP1	2700/-
Pothotuwa	OP1	3250/-
Sunrise	OP	1650/-
Kings Bru	OP	1650/-
Lucky Dais	OPA	1600/-
Mirissawatte	OPA	1600/-
Sunrise	OPA	1600/-
Green Lanka	OPA	1600/-
Lumbini	PEKOE	2350/-
*Makandura	PEKOE	2250/-
New Batuwangala	PEKOE1	2500/-

LOW GROWN TIPPY GRADES

Lions	BOP	2300/-
Mulatiyana Hills	BOP	2300/-
Kamarangapitiya	BOPSP	2200/-
Kings Bru	BOPF	1700/-
Makandura	BOPF	1460/-
*Sithaka	BOPF	1440/-
Rajjuruwatta Super	BOPFSP	2100/-
*Greenwin Super	BOPFSP	1850/-
*Sithaka	FBOP	2600/-
*Wattahena	FBOP1	2100/-
*New Nivithigala	FBOP1	2100/-
*Wattahena	FBOP1	2000/-
Kiruwanaaganga	FBOP1	2000/-
*Sithaka	FBOP1	1750/-
Halwitigala SH	FBOPF	1420/-
Sihara	FBOPF	1420/-
Nilwala	FBOPF	1420/-
*Katanwila	FBOPF	1400/-
Lumbini	FBOPF1	1900/-

PREMIUM FLOWERY

Fortune	FBOPFSP	2450/-
New Deniyaya	FBOPFSP	2400/-
*Wikiliya	FBOPFSP	2350/-
*Greenwin Super	FBOPFSP	2350/-
Pothotuwa	FBOPFEXSP	2950/-
New Spring View	FBOPFEXSP1	2850/-
New Falcon Lanka	FBOPFEXSP1	2450/-
*New Marakanda	FBOPFEXSP1	2400/-

Dust

Pothotuwa	DUST	920/-
Wattegodde	DUST	920/-
Fortune	DUST	900/-
*Chandrika Estate	DUST	880/-
*Wattahena	DUST	880/-
Mattakelle	DUST1	1600/-
Hingalgoda CTC	PD	1400/-

WESTERN MEDIUM

*Vellai Oya	DUST	810/-
*Vellai Oya	DUST1	1140/-

COLOMBO AUCTION – WEEKLY GROSS SALE AVERAGES

SALE NO.22 OF 11TH JUNE, 2025

	2025			2024	
	Weekly	Month to Date	Year to Date	Weekly	Year to Date
Uva High Grown	1,012.13	1,008.80	1,044.55	1,093.44	1,116.59
Western High Grown	994.98	1,005.52	1,105.56	1,161.75	1,199.12
High Grown	1,000.22	1,006.52	1,086.55	1,138.19	1,173.43
Uva Medium	1,047.02	1,045.15	1,084.92	1,133.05	1,155.42
Western Medium	973.52	979.20	1,023.28	1,055.07	1,088.02
Medium Grown	999.16	1,001.55	1,042.96	1,084.17	1,110.43
Low Grown (Orthodox)	1,242.86	1,237.04	1,266.77	1,362.70	1,402.09
Combined L.G. (Orthodox + CTC)	1,229.85	1,218.73	1,253.28	1,346.17	1,377.25
Total	1,134.64	1,128.60	1,182.60	1,258.98	1,289.24

Private Sale Figures (09.06.2025 – 14.06.2025) - 162,178.00 kgs

Cumulative - 4,931,196.26 kgs

DETAILS OF TEAS AWAITING SALE

SALE NO: 24

SALE NO: 25

Sale of 24th /25th June '25

Sale of 01st /02nd July '25

	<u>Lots</u>	<u>Qty. (Kgs)</u>	<u>Lots</u>	<u>Qty. (Kgs)</u>
Low Grown Leafy	2,053	831,055	2,231	885,942
Low Grown Semi Leafy	1,588	697,128	1,533	674,676
Low Grown Tippy	2,021	962,742	1,916	895,525
High & Medium	2,337	1,122,963	1,954	907,258
Off Grade/BOP1A	2,449	1,376,587	2,805	1,508,514
Dust	655	620,431	661	620,474
Premium Flowery	441	67,577	364	57,364
Ex-Estate	828	858,896	826	831,010
Total	<u>12,372</u>	<u>6,537,379</u>	<u>12,290</u>	<u>6,380,763</u>

FUTURE CATALOGUES CLOSURE

Sale No.26 of 07th /08th July, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **19th June, 2025 at 04.30 p.m.**

Sale No.27 of 15th /16th July, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **26th June, 2025 at 04.30 p.m.**

Sale No.28 of 22th /23th July, 2025

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

SALE NO. 24

AUCTION OF 24th /25th JUNE, 2025

BROKERS' SELLING ORDER

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

Crop & Weather

For the period 10th to 16th June, 2025

Western/Nuwara Eliya Regions:-

Both regions reported rain and windy conditions throughout the week. The Department of Meteorology expects fairly heavy showers in the Western and Nuwara Eliya regions in the week ahead.

Uva/ Udapussellawa Regions:-

The Uva and Uda Pussellawa regions reported bright weather and windy conditions with occasional showers throughout the week. According to the Department of Meteorology, 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 to continue in the Low Grown Region in the week ahead according to the Department of Meteorology.

Crop Intake:-

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

WORLD CROP STATISTICS (MKGS)

Country	Month	2024	2025	Difference +/-	To-date 2024	To-date 2025	Difference +/-
SRI LANKA	April	21.69	26.40	4.71	80.16	88.38	8.22
NORTH INDIA	March	46.90	49.43	2.53	49.18	60.44	11.26
SOUTH INDIA	March	16.88	15.71	-1.17	48.98	47.48	-1.50
MALAWI	Jan.	7.20	5.30	-1.90	7.20	5.30	-1.9
KENYA	Feb.	55.44	44.61	-10.83	114.40	98.90	-15.5

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

OTHER MARKETS

BANGLADESH AUCTION

SALE NO. 06 OF MONDAY, 16th June, 2025

CTC LEAF : 32,073 packages of tea on offer met with a restricted demand.

BROKENS/FANNINGS: Well made varieties met with a good market and were dearer mostly selling between Tk.260/- and tk.300/-. Below best followed a similar trend and sold between Tk.250/- and Tk.255/-. All other varieties met with a selective demand and where sold realised Tk.245/-. BLF teas met with more demand and sold between Tk.170/- and 225/.

DUST : 7,574 packages of tea on offer met with a restricted demand. Good liquoring Dusts sold well and prices could be quoted between Tk. 280/- and Tk.305/- with more withdrawals particularly the CD. Mediums were also in good demand and sold between Tk.255/- and Tk. 275/-. Plain/BLF Dusts sold quite well and prices also appreciated substantially for BLF Dusts. Only Blenders lent strong support. Loose tea buyers were absent.

COMMENTS : Market commenced with a hesitant start where demand was noticeably limited but as the sales progressed demand increased which emanated from the major Blenders. Loose tea buyers remained virtually absent.

BLF Dusts met with a good demand.

A revised Minimum Floor Price of Tk.245/- for Sylhet and Chittagong teas and Tk.170/- for the BLF was introduced from today's sale.

Our Catalogue: (Sale 6) Avg : Tk 250.17, Sold 48.42% ,
(Sale 5) Avg : Tk 244.99, Sold 74.72%

Quotations – This Week – (In Taka)

Brokens	This Week	Last Week	Fannings	This Week	Last Week	Dust	This Week	Last Week
Best	260-300	260-300	Best	260-300	255-300	PD	200-305	220-309
Good	250-255	230-250	Good	250-255	230-250	RD	200-305	188-315
Medium	245-250	220-230	Medium	245-250	220-230	D	225-295	210-314
Plain	NQTA	190-200	Plain	NQTA	190-200	CD	212-295	215-302
BLF	170-200	160-217	BLF	170-225	160-215	BLF	200-260	188-240



SOUTH INDIAN ROUNDUP

FOR THE WEEK ENDING – 14th JUNE, 2025

KOCHI

CTC LEAF

Demand : Less Demand: Limited quantity of all grades sold at easier levels with heavy withdrawals.

ORTHODOX LEAF

Demand : Good demand.

Buying Pattern : High grown, blacker and well made whole leaves sold at barely steady to easier levels depending on quality. Primary and secondary brokens were irregular around last levels. Fannings were dearer

Market : CIS & Middle East Buyers operated.

DUST

Demand : Fair demand.

Buying Pattern : Popular marks and better mediums sold at firm levels. Medium and plainer sorts sold irregularly around last levels with some withdrawals noticed on PD grade.

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

COONOR

CTC LEAF

Demand : Fair.

Market : The market witnessed further drop in price levels this week too as the price average has come to below Rs.100/- after almost a year which may possibly linked to the current overall quality situations. The opening market had witnessed a price drop of Rs.2/- to Rs.3/- and further more as the sale progressed. The sale had continued to suffer fair withdrawals on the browner flakier and fibrous with faulty liquors. However a small quality of fairly cleaner and brighter liquory teas have either held their levels or rather moved up in prices at times.

The overall sale percentage was 77.26% at an average of Rs.98.06

Buying Pattern: The major blenders and packeteers were the mainstay yet again absorbing the maximum quantity of the teas sold, the performance of them was mostly noticed on the sustainable certified teas sold. The preferences of them was mostly noticed on the sustainable certified teas. The internal was operating cautiously whilst SSK Exports the only participant on the export front absorbing the major quantity of blacker cleaner BOPF's.

ORTH LEAF

Demand : Fairly strong.

Market : Market had witnessed a downtrend on the whole leaves and on the major quantity of the brokens. The fannings and the secondaries have traded irregularly and mostly at easier levels.

The overall sale percentage was 95.96% at an average of Rs.146.71

Buying Pattern: Strong presence of the Exporters was noticed with Shah Brothers being active. Internal was rather subdued whilst the major blenders (Hindustan Unilever Limited) was operating selectively and mostly the fannings.

CTC DUST**Demand :** Good.**Market :** The down trend continued this week too as it had witnessed a price drop of Rs. 2/- to Rs. 3/- and more following quality on the major and quality that was traded. However the brighter, brisker and fairly blacker teas have traded steady to occasionally dearer levels. The sale had witnessed a comparatively better percentage due to the lower quotations.**The overall sale percentage was 88.40% at an average of Rs.102.59****Buying Pattern:** A very strong export enquiry was forthcoming with SSK Exports and Madhujayanthi were active and others were lending fair support. The major blenders were also seen absorbing fair quantity whilst other internal buyers operating cautiously. As usual Ms. Anjaneya Enterprises (Devagiri Tea Produce Co) continued their support on the brighter liquory teas.**ORTH DUST****Demand :** Fair.**Market:** Easier market across all grades and categories by Rs.2/- to RS. 5/- and more sometimes following quality. However some select lines of the popular primary dust grades have held their levels or rather sold at fully form levels.**The overall sale percentage was 79.76% at an average of Rs. 126.87****Buying Pattern:** Strong Export operation was witnessed on the major quality that was traded. Internal was selective or rather subdued.**COIMBATORE****CTC LEAF****Demand :** Fair general demand..**Market :** Better medium and popular teas were lower by Rs.2/- with some withdrawals. Medium teas were lower by Rs.2/-to Rs.3/- with some withdrawals. Plainer teas were irregular and lower by Rs.8/- to Rs.10/- with heavy withdrawals.**Buying Pattern :** Blenders and packeteers were active. Exporters and internal were selective.**ORTH LEAF****Demand :** Fair demand.**Market :** Well made brokens were lower by Rs.5/- to Rs.10/-. Secondary brokens / OF were lower by Rs.2/- to Rs.3/- with some withdrawals. Others not quotable.**Buying Pattern :** Exporters were active.**CTC DUST****Demand :** Good general demand.**Market :** Better medium / popular teas were steady to firm with few withdrawals. Medium teas were lower by Rs.3/- to Rs.4/-with some withdrawals. Plainer teas were lower by Rs.2/- As sale progressed the plainer teas were fully firm to dearer.**Buying Pattern :** All sections were active.**ORTH DUST****Demand :** Less demand.**Market :** Lower with some withdrawals.**Buying Pattern :** Exporters were active.

MOMBASA TEA AUCTION MARKET REPORT

Sale No.24 of 16TH & 17TH JUNE, 2025

There was improved general demand for the 184,169 packages (12.54mkgs) available in the market; 41.11% was unsold.

MARKETS:

Pakistan Packers lent strong support with **Egyptian Packers** active; **Yemen** and **other Middle Eastern countries** held value. **Kazakhstan, other CIS states** and **Afghanistan** were more active while **Bazaar** maintained participation. There was improved but selective enquiry from **UK** with **Russia** showing some interest. **Sudan** remained absent. **South Sudan** and **Local Packers** lent some enquiry while **Somalia** were active at the lower end of the market.

OFFERINGS:

Leaf Grades - 88,359 packages (5.80m/kgs) – 48.48% unsold.
 Dust Grades - 75,500 packages (5.64m/kgs) – 39.84% unsold.
 Secondary Grades - 20,760 packages (1.10m/kgs) – 14.35% unsold.

LEAF GRADES (M2 & M3)

BP1:

Best: Met very irregular enquiry with some teas advancing by up to USC66 and USC130 while others were discounted by up to USC52.

Brighter: Were dearer by up to USC18 to easier by up to USC12.

Mediums: KTDA mediums were steady to USC5 above previous levels with plantation mediums appreciating by up to USC7 while others eased by up to USC6.

Lower Medium: Mostly firm with some invoices up to USC11 dearer while others lost up to USC4.

Plainer: Steady to USC15 above previous rates.

PF1:

Best: Steady to dearer by up to USC31.

Brighter: Held value3 with some teas up to USC10 dearer to easier by up to USC8.

Mediums: KTDA mediums gained up to USC21 with plantations mediums ranging between USC20 dearer to easier by up to USC10.

Lower Medium: Firm to mostly dearer by up to USC10 to USC3 below previous rates.

Plainer: Steady to USC8 dearer to easier by up to USC6 for select lines.

DUST GRADES (M1)**PDUST:**

Best: Met improved absorption advancing by up to USC32 but select lines lost up to USC4.

Brighter: Steady to USC6 above previous rates to easier by a similar margin.

Mediums: KTDA mediums were firm to USC4 dearer to easier by up to USC5 while plantation mediums saw irregular absorption varying between USC5 dearer to easier by up to USC14.

Lower Medium: Steady to mostly dearer by up to USC5 to easier by up to USC7.

Plainer: Met mostly firm enquiry with some teas up to USC2 above last rates to easier by up to USC6.

DUST1:

Best: Saw irregular interest ranging between USC18 dearer to easier by up to USC4.

Brighter: Were up to USC9 above previous rates to USC15 easier.

Mediums: KTDA mediums were irregular at mostly easier by up to USC16 but select lines gained up to USC16 while plantation mediums appreciated by up to USC9 however a few invoices shed u to USC3.

Lower Medium: Were mostly dearer by up to USC12.

Plainer: Lost up to USC5 but select teas were up to UCS3 dearer.

SECONDARY GRADES(S1)

In the Secondary Catalogues, best **BPs** shed value whilst other were about steady; **PFs** mostly tended firm while some invoices were u to USC4 dearer but others were about easier. Clean well sorted coloury **Fannings** were steady while **similar DUSTs** were dearer. **Other Fannings** held value with **DUSTs** selling at previous levels. **BMFs** were absorbed .

June 18, 2025

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International Tea News

India Tea Market Poised for Growth:

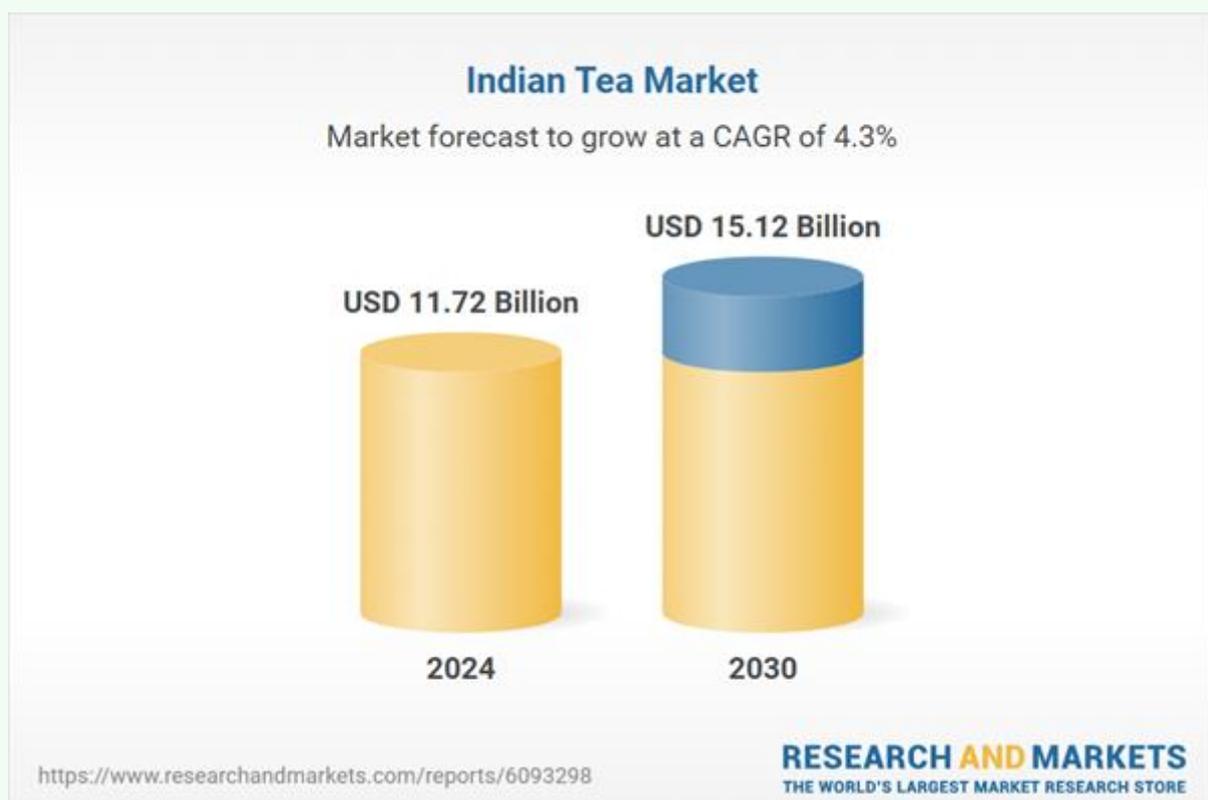
Insights into a USD 15.12 Billion Opportunity by 2030

The Indian tea market offers opportunities through strong domestic consumption driven by cultural integration and diverse regional varieties. Growth is fueled by rising health awareness, boosting demand for green and herbal teas. Export expansion and digital sales enhance access, while government support aids production and quality.

The Indian Tea Market was valued at USD 11.72 Billion in 2024, and is expected to reach USD 15.12 Billion by 2030, rising at a CAGR of 4.34%.

India's tea industry stands as one of the largest globally, driven by robust domestic consumption, regional tea diversity, and deep cultural integration. As both a top producer and consumer, the market thrives on the prominence of varieties like Assam, Darjeeling, and Nilgiri, which hold global appeal. Rising health awareness has fueled growth in green and herbal tea segments, while strong retail penetration, expanding exports, and digital sales channels are enhancing market access.

Additionally, government initiatives, including those by the Tea Board of India, are playing a key role in improving production capabilities and maintaining quality standards, fostering the sector's steady evolution.



Key Market Drivers: Strong Domestic Consumption and Cultural Integration

A major factor propelling India's tea market is the ingrained tea-drinking culture that spans across all demographics and regions. Tea, commonly referred to as chai, is embedded in daily routines and social customs, making it a staple beverage in urban and rural households alike. India ranks among the highest globally in per capita tea consumption, averaging over 750 grams annually. The market benefits from its accessibility - served everywhere from street vendors to upscale establishments - and regional preferences such as masala chai and kadak chai that cater to diverse palates.

Tea also plays a central role in social occasions, hospitality, and festive gatherings, reinforcing its place in everyday life. This deeply rooted cultural affinity ensures resilient domestic demand and insulates the market from international economic fluctuations, supporting consistent sales and long-term market growth.

Key Market Challenges: Climate Change and Its Impact on Tea Cultivation

The Indian tea industry faces a pressing challenge from the growing impact of climate change on cultivation. Tea plantations are sensitive to environmental variables like temperature, rainfall, and humidity, all of which have become increasingly unpredictable. Unseasonal weather patterns, droughts, and rising temperatures have disrupted harvest cycles and negatively affected both yield and flavor, particularly in regions such as Assam, Darjeeling, and Nilgiri. This jeopardizes the quality and global appeal of premium teas, especially Darjeeling, which is valued for its distinctive aroma and taste.

Climate shifts have also led to increased pest infestations, prompting greater use of agrochemicals, thereby raising production costs and ecological concerns. Although adaptive strategies like using shade trees and climate-resilient tea variants are being explored, small growers often lack the resources or expertise to implement them, leaving large portions of the market exposed to ongoing climatic risks.

Key Market Trends: Rise of Health and Wellness-Oriented Teas

An emerging trend reshaping the Indian tea market is the growing consumer inclination toward health and wellness-based teas. As awareness of nutrition and lifestyle diseases grows, many are moving from traditional milk teas to healthier options like green, herbal, and organic teas. Green tea is especially favored for its antioxidant benefits and support for metabolism and weight control.

Herbal blends featuring ingredients like tulsi, ginger, and ashwagandha are gaining popularity for their natural therapeutic properties. The pandemic further accelerated this shift, as consumers prioritized immunity and holistic wellness. Ayurvedic and detox tea offerings have carved a niche among urban and semi-urban consumers, prompting brands to introduce functional blends with wellness benefits, clean labels, and targeted marketing.

This wellness-focused trend is expanding the premium segment and reshaping consumer expectations, positioning tea not just as a refreshment but as a lifestyle choice.

Key Market Players:

- Tata Consumer Products Limited
- Harrisons Malayalam Limited
- The United Nilgiri Tea Estates Co Ltd.
- Teesta Valley Tea Company
- Kanan Devan Hills Plantations Company Private Limited
- Kangra Valley Herbals Products
- Dharamsala Tea Company
- Hindustan Unilever Limited
- Organic India Private Limited
- Wagh Bakri Tea Group

Key Attributes:

Report Attribute	Details
No. of Pages	132
Forecast Period	2024 - 2030
Estimated Market Value (USD) in 2024	\$11.72 Billion
Forecasted Market Value (USD) by 2030	\$15.12 Billion
Compound Annual Growth Rate	4.3%
Regions Covered	India

Report Scope:

In this report, the India Tea Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Tea Market, By Product Type:

- Oolong
- Green
- Black
- Others

India Tea Market, By Distribution Channel:

- Supermarkets/Hypermarkets
- Departmental Stores
- Online
- Others

India Tea Market, By Region:

- North
- South
- East
- West

For more information about this report visit <https://www.researchandmarkets.com/r/xydr4>
