

# **TEA MARKET REPORT**

**SALE NO: 27**

**July 15 & 16, 2025**



LANKA COMMODITY BROKERS LTD

## **LANKA COMMODITY BROKERS LTD**

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## COMMENTS

This week's Tea Auction, namely Sale #27 was held on July 15<sup>th</sup> (Tue.)/16<sup>th</sup> (Wed.) 2025. A total weight of 6.3 MKGS was on offer, which shows a increase when compared to the previous week's quantity. The Low Grown Leafy, Semi Leafy, Tippy/Small Leaf & Premium Flowery catalogues totaled 2.6 MKGS, while the Main Sale High & Medium segment had 0.97 MKGS. The Ex Estate category had 0.76 MKGS

The small volume of Ex-Estate teas on offer at today's auction met with improved demand. A selection of Best Western BOP/BOPF's gained Rs.50/- and more whilst in the below best category, improved invoices too appreciated0 in value. Teas at the lower end were fully firm to Rs.20-40/- dearer. Nuwara Eliya's were mostly unsold due to lack of suitable offer. Uva/Uda Pussellawa BOP's tended irregular whilst their corresponding BOPF's coloury sorts were firm but others eased Rs.20-40/-. CTC Teas - High & Medium PF1's were firm to Rs.20-40/- dearer whilst Low grown though firm tended to fluctuate following quality. There were hardly any BP1's on offer this week. Shippers to Japan, Europe, South Africa along with China and Hong Kong were active along with Russia and the CIS.

Low Grown whole leaf teas continued to sell well with the exception of teas at the lower end which tended irregular. Small leaf teas too sold well at dearer levels this week along with bright tippy sorts appreciating further. There continued to be strong demand this week too from major markets.

The newly imposed 30% US Tariff on Sri Lanka Exports especially for tea, rubber and other plantation crops posed a serious threat to the country's export economy. The illusion of progress from a 44%-30% tariff reduction is misleading, as the higher rate was never implemented and importers had already adjusted to a 10% rate.

This week's auction comprised of 12,448 lots with a total quantity of 6,314,284kgs.

The catalogue wise breakdown was as follows:-

	<u><b>Lots</b></u>	<u><b>Qty. (Kgs)</b></u>
Low Grown Leafy	2,210	889,195
Low Grown Semi Leafy	1,672	737,193
Low Grown Tippy	2,093	995,689
High & Medium	2,140	974,273
Off Grade/BOP1A	2,605	1,406,690
Dust	548	487,227
Premium Flowery	403	63,586
Ex-Estate	<u>777</u>	<u>760,431</u>
<b>Total</b>	<u><b>12,448</b></u>	<u><b>6,314,284</b></u>

### **In Lighter Vein**

#### **I Am Your Father**

Two classmates were chatting in their lunch break... "I know how to get money real quick" says one," how?"

"Go to your dad and say, "I know the truth" and he'll give you money"

So the young boy went home and said "dad, I know the truth" and his dad gave him ten dollars and told him not to tell anyone 'the truth'.

He then went to his mother, " Mom, I know the truth" he said.

"Please don't tell your dad" she said and gave him twenty dollars.

Content with thirty dollars he went outside to go to the arcade and saw the milkman. "I know the truth," he shouted out.

The milkman replied "Well come and hug your real father then"

## LOW GROWN TEAS

### LEAFY/SEMI LEAFY

- BOP1** : Select best invoices appreciated whilst the best teas tended irregular. Teas at the lower end were easier.
- OP1** : Well made OP1's were dearer whilst the balance were irregular. Stalky invoices declined.
- OP** : Teas in the select best category maintained whilst the balance together with shorter varieties were dearer. Teas at the lower end were irregular.
- OPA** : High prices OPA's appreciated whilst balance were maintained. Poorer sorts were irregular.
- PEK/PEK1** : Select best Pekoe's were firm whilst balance too maintained last week levels. Best Pekoe1's generally lower whilst the balance tended 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>
<b>BOP1</b>	<b>1400-3000</b>	1300-3050	<b>1000-1200</b>	900-1000	<b>850-900</b>	<b>850-900</b>
<b>OP1</b>	<b>1600-3250</b>	1550-3250	<b>1100-1250</b>	1100-1250	<b>850-950</b>	<b>900-1000</b>
<b>OP</b>	<b>1200-1550</b>	1100-1500	<b>950-1100</b>	900-1000	<b>800-850</b>	<b>800-850</b>
<b>OPA</b>	<b>1200-1800</b>	1100-1550	<b>950-1050</b>	900-1000	<b>800-850</b>	<b>800-850</b>
<b>PEK/PEK1</b>	<b>1600-2550</b>	1600-2550	<b>1250-1350</b>	1250-1350	<b>1000-1200</b>	<b>1050-1250</b>

## TIPPY/SMALL LEAF

- BOP/BOPSP** : BOP's, in general, were easier.
- BOPF/BOPFSP** : BOPF's, in general, sold around last levels.
- FBOP/FBOP1** : Select Best FBOP's were easier, whilst the Best sold around last levels. The balance, in general, were irregularly easier. FBOP1's, in general, were lower.
- FBOPF/FBOPF1** : Very Tippy Teas met with good demand and were dearer, whilst the Best and Below Best were firm. The balance declined. However, the smaller varieties, in general, were easier. FF1's, in general, were lower.
- FBOPFSP** : Select best and Best categories were firm to easier, whilst others maintained.
- FFEXSP/SP1** : Select best category met with good demand, whilst the Below Best categories maintained. Balance firm.

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>
<b>BOP/BOPSP</b>	<b>1850-2250</b>	2000-2450	<b>1700-1800</b>	1800-1950	<b>1500-1650</b>	1600-1750
<b>BOPF /BOPFSP</b>	<b>1750-1900</b>	1800-2300	<b>1500-1650</b>	1500-1650	<b>1320-1440</b>	1350-1450
<b>FBOP/FBOP1</b>	<b>1900-2450</b>	1950-2600	<b>1700-1850</b>	1800-1900	<b>1600-1650</b>	1600-1750
<b>FBOPF/FBOPF1</b>	<b>1650-1900</b>	1550-1700	<b>1500-1600</b>	1500-1600	<b>1400-1450</b>	1400-1450
<b>FBOPFSP/EXSP</b>	<b>4700-5800</b>	4500-6000	<b>3300-4400</b>	3200-4200	<b>2500-3000</b>	2300-2800

### **MEDIUM GROWN LEAFY/SEMI LEAFY TEAS**

**FBOP** : Best on offer declined in value; below best and poorer sorts too were declined fairly sharply.

**FBOPF/FBOPF1** : Well made teas on offer declined in value; secondaries and the poorer teas too were discounted.

**PEK/PEK1** : Well made shotty invoices were appreciated on last week levels, the mixed below best varieties and the poorer sorts tended 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>
<b>FBOP</b>	<b>1300-1700</b>	1340-1650	<b>1100-1300</b>	1150-1400	<b>900-1100</b>	950-1250
<b>FBOPF/FBOPF1</b>	<b>1250-1600</b>	1280-1600	<b>1150-1250</b>	1180-1340	<b>1050-1150</b>	1100-1250
<b>PEK/PEK1</b>	<b>1250 -1750</b>	1300-2200	<b>980-1250</b>	1000-1250	<b>900-980</b>	920-1200

### **HIGH GROWNS TEAS**

#### **MARKET: Improved demand**

**BOP** : Best Western's Select invoices gained by up to Rs.50/- per kg, whilst the others were irregular. In the Below Best category, a selection of improved teas gained by Rs.50/- per kg and more following quality /special inquiry, whilst the others were firm and dearer to a lesser extent. Teas at the lower end of the market were firm and Rs.20-40/- per kg dearer, whilst the cleaner sorts appreciated further. Nuwara Eliya's were mostly unsold. Uda Pussellawa's were irregular and tended easier. Uva's – Better teas were firm, whilst the others were barely steady.

**BOPF** : Best Western's were firm and up to Rs.50/- per kg dearer following quality, whilst the others were irregular. In the Below Best category, a selection of improved teas gained by Rs.50/- per kg and more, whilst the others were firm and dearer to a lesser extent. Plainer clean leaf types were Rs.20-40/- per kg dearer, whilst the others were firm and dearer to a lesser extent. Nuwara Eliya's were mostly unsold. Uda Pussellawa's were irregular and easier. Uva's – Clean leaf coloury sorts were firm, whilst the others were irregular.

Quotations (Rs./Kg)	BOP		BOPF	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
<b>Best Westerns</b>	<b>1260 - 1400</b>	1240 - 1380	<b>1320 - 1460</b>	1300 - 1400
<b>Below Best Westerns</b>	<b>1120 - 1220</b>	1100 - 1220	<b>1140 - 1300</b>	1120 - 1280
<b>Plainer Westerns</b>	<b>890 - 1100</b>	880 - 1080	<b>900 - 1120</b>	880 - 1100
<b>Nuwara Eliyas</b>	N/A	N/A	N/A	1200
<b>Brighter UdaPussellawas</b>	<b>980 - 1020</b>	890 - 900	<b>1040 - 1060</b>	1000 - 1140
<b>Other Uda Pussellawas</b>	<b>840 - 870</b>	850 - 860	<b>850 - 880</b>	850 - 920
<b>Best Uva's</b>	<b>1120 - 1140</b>	1120 - 1240	<b>1200 - 1280</b>	1200 - 1300
<b>Other Uva's</b>	<b>920 - 1040</b>	920 - 1040	<b>1040 -1160</b>	1040 -1140

## MEDIUM GROWN TEAS

**BOP** : Generally firm.

**BOPF** : Better sorts were Rs.20-40/- per kg dearer, whilst the others were firm and dearer to a lesser extent.

Quotations (Rs./Kg)	BOP		BOPF	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
<b>Best Westerns</b>	<b>800 - 1600</b>	830 - 1600	<b>840-1100</b>	800-1100

## CTC TEAS

### **HIGH GROWN:-**

**BP1** - Hardly any offerings.

**PF1** - Better sorts were firm and Rs.20-40/- per kg dearer, whilst the others were irregular following quality.

### **MEDIUM GROWN:-**

**BP1** - Irregular.

**PF1** - Better sorts – A few select invoices were firm, whilst the others were irregular.

### **LOW GROWN:-**

**BP1** - Hardly any offerings.

**PF1** - Generally firm though prices tend to fluctuate following quality.

Quotations (Rs./Kg)	BP1		PF1	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
<b>High</b>	N/A	N/A	<b>900-1200</b>	890-1120
<b>Medium</b>	<b>700-1080</b>	710-1020	<b>720-1180</b>	710-1120
<b>Low</b>	<b>720-1320</b>	730-820	<b>720-1550</b>	700-1600

## OFF GRADES

**FGS/FGS1** : Select best FNGS/FNGS1 advanced Rs.50-75/- per kg. Others firm to dearer by Rs.20-40/-. Low Grown select best FNGS/FNGS1 firm to easier to Rs.10-20/-. Below best and poorer teas however firm on last. Select best BM's firm to dearer by Rs.20/- per kg. Best types and below best types held firm and browner varieties witnessed a decline.

**BOP1A** : Select best BOP1A's held firm. Best teas and others were firm to lower by Rs.10-20/- 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)	810-920	810-880	780-830	780-830	800-840	800-850
Good Fannings (CTC)	720-810	720-810	730-790	730-790	770-830	770-830
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	830-890	830-880	830-900	830-890	830-920	830-920
Other BM's	800-820	800-820	800-820	800-820	800-820	800-820
Best BOP1As	900-910	900-910	900-910	900-910	1100-1400	1100-1400
Other BOP1As	840-880	840-880	840-880	840-880	840-880	840-880

## DUST

**DUST/DUST1:** High Grown select best varieties maintained last levels, whilst their secondaries and below best types were firm to dearer. Mid grown teas sold firm on last levels, whilst the select best Low grown were fully firm to dearer.

**PD** : High grown together with Medium grown were fully firm to dearer. Low grown select best types were firm on last level.

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)	800 - 1550	800 - 1600	760 - 1180	750 - 1000	750 - 1320	730 - 1360
Good Primary PD (CTC)	740 - 1180	760 - 1140	740 - 1180	720 - 1120	750 - 1360	740 - 1360
Secondary Dust	760 - 1160	770 - 1000	660 - 700	650 - 840	700 - 1140	600 - 1040



**WESTERN MEDIUM**

Greenwood	BOP	1600/-
<b>*Hatale</b>	<b>BOPSP</b>	<b>1340/-</b>
Craighead	BOPSP	1340/-
<b>*Vellai Oya</b>	<b>BOPF</b>	<b>1100/-</b>
<b>*Vellai Oya</b>	<b>BOPF</b>	<b>1060/-</b>
<b>*Uplands</b>	<b>BOPFSP</b>	<b>1100/-</b>
Dartry Valley	BOP1	1650/-
Harangalla	FBOP/FBOP1	1700/-
Dartry Valley	FBOP/FBOP1	1700/-
Dartry Valley	FBOP/FBOP1	1650/-
<b>*Uplands</b>	<b>FBOP/FBOP1</b>	<b>1500/-</b>
<b>*Ancoombra</b>	<b>FBOPF/FBOPF1</b>	<b>1600/-</b>
Dartry Valley	FBOPF/FBOPF1	1550/-
Harangalla	FBOPF/FBOPF1	1500/-
Hansagiri Kotmale	OP/OPA	1260/-
Galgewatta	OP1	1600/-
<b>*Meezan</b>	<b>PEK/PEK1</b>	<b>1750/-</b>
<b>*Harangalla</b>	<b>PEK/PEK1</b>	<b>1700/-</b>
Dartry Valley	PEK/PEK1	1700/-
<b>*Hatale</b>	<b>PEK/PEK1</b>	<b>1650/-</b>
Dartry Valley	PEK/PEK1	1650/-

**WESTERN HIGH**

Ingestre	BOP	1400/-
Wanarajah	BOP	1400/-
Gouravilla	BOP	1400/-
Wattegodde	BOPSP	1460/-
Dessford	BOPF/BOPFSP	1460/-
Alton	BOPF/BOPFSP	1460/-
Torrington	BOP1	1420/-
Bambrakelly	FBOP/FBOP1	1380/-
Cymru	FBOPF/FBOPF1	1380/-
Venture	OP/OPA	1280/-
Venture	OP1	1380/-
Craig hill	PEK/PEK1	1750/-

**NUWARA ELIYA**

Court Lodge	BOP1	1100/-
Court Lodge	FBOP/FBOP1	1000/-
Kenmare	FBOP/FBOP1	1000/-
Kenmare	FBOPF/FBOPF1	960/-
Kenmare	OP/OPA	960/-
Court Lodge	OP/OPA	960/-
Court Lodge	PEK/PEK1	1220/-

**CTC TEAS****HIGH GROWN**

Dunsinane CTC	PF1	1200/-
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**MEDIUM GROWN**

Strathdon CTC	BP1	1080/-
<b>*New Peacock CTC</b>	<b>PF1</b>	<b>1180/-</b>

**LOW GROWN**

Ceciliyan CTC	BP1	1320/-
Hingalgoda CTC	PF1	1550/-

**UVA MEDIUM**

Aruna Passara	BOP	1340/-
Glen Alpin	BOPSP	1400/-
Dickwella	BOPF/BOPFSP	1420/-
Aruna Passara	BOP1	1750/-
<b>*Roseland Uva</b>	<b>FBOP/FBOP1</b>	<b>1550/-</b>
Glen Alpin	FBOP/FBOP1	1500/-
<b>*Roseland Uva</b>	<b>FBOP/FBOP1</b>	<b>1480/-</b>
<b>*Halpewatta Uva</b>	<b>FBOPF/FBOPF1</b>	<b>1380/-</b>
<b>*Roseland Uva</b>	<b>FBOPF/FBOPF1</b>	<b>1380/-</b>
High Spring	FBOPF/FBOPF1	1380/-
Aruna Passara	FBOPF/FBOPF1	1380/-
Uva Tenne	FBOPF/FBOPF1	1380/-
Aruna Passara	OP/OPA	1240/-
Aruna Passara	OP1	1600/-
Aruna Passara	PEK/PEK1	1650/-
Aruna Keppetipola	PEK/PEK1	1650/-

**UVA HIGH**

Ellathota Uva	BOP	1160/-
Craig	BOPSP	1380/-
Nayabedde	BOPF/BOPFSP	1280/-
Uva Highlands	BOP1	1650/-
Glenanore	FBOP/FBOP1	1420/-
Uva Highlands	FBOP/FBOP1	1420/-
Mahadowa	FBOPF/FBOPF1	1360/-
Craig	FBOPF/FBOPF1	1360/-
Uva Highlands	FBOPF/FBOPF1	1360/-
Ellathota Uva	OP/OPA	1200/-
Mount Uva	OP/OPA	1200/-
Uva Kellie	OP1	1420/-
Ellathota Uva	PEK/PEK1	1600/-

**UDAPUSSELLAWA**

Kirklees	BOP	1020/-
Luckyland	BOPSP	940/-
Luckyland	BOPF/BOPFSP	1060/-
Kirklees	BOPF/BOPFSP	1060/-
Gampaha	BOP1	1280/-
Delmar	FBOP/FBOP1	1260/-
Delmar	FBOPF/FBOPF1	1320/-
Gampaha	OP/OPA	1100/-
Gampaha	OP1	1400/-
Gampaha	PEK/PEK1	1280/-

**OFF GRADES**

Ransewana	BP	1200/-
Hingalgoda CTC	PF	1180/-
Kurunduwatta	BM	1120/-
Wattegodde	FNGS/FNGS1	1080/-
Eildon Hall	FNGS/FNGS1	1080/-
<b>*Chandrika Estate</b>	<b>BOP1A</b>	<b>1420/-</b>
<b>*Aldora</b>	<b>BOP1A</b>	<b>1360/-</b>

**LOW GROWN LEAFY GRADES**

Gunawardana	BOP1	3000/-
Mulatiyana Hills	BOP1	2650/-
Kolonna Super	BOP1	2650/-
<b>*Sithaka</b>	<b>BOP1</b>	<b>2600/-</b>
Pothotuwa	OP1	3250/-
Galahitiya	OP	1550/-
New Panilkanda	OP	1550/-
Nilrich	OP	1550/-
Mulatiyana Hills	OP	1550/-
<b>*Ganganee</b>	<b>OP</b>	<b>1500/-</b>
Green Lanka	OPA	1800/-
Lumbini	PEKOE	2550/-
<b>*Green House</b>	<b>PEKOE</b>	<b>2200/-</b>
<b>*Andaradeniya S</b>	<b>PEKOE1</b>	<b>2250/-</b>
Selna	PEKOE1	2250/-
New Spring view	PEKOE1	2250/-
Galatara	PEKOE1	2200/-
New Batuwangala	PEKOE1	2200/-
Peak View Super	PEKOE1	2200/-
Golden Garden	PEKOE1	2200/-
<b>*Wattahena</b>	<b>PEKOE1</b>	<b>2150/-</b>

**LOW GROWN TIPPY GRADES**

<b>*Mahaliyadda</b>	<b>BOP</b>	<b>2250/-</b>
Nawagamuwahena	BOP	2150/-
Brombil	BOP	2150/-
<b>*Ganganee</b>	<b>BOP</b>	<b>2100/-</b>
Kamarangapitiya	BOPSP	2100/-
<b>*Ganganee</b>	<b>BOPSP</b>	<b>1900/-</b>
Kings Bru	BOPF	1750/-
Sithaka	BOPF	1700/-
<b>*Greenwin Super</b>	<b>BOPFSP</b>	<b>1900/-</b>
<b>*Ganganee</b>	<b>BOPFSP</b>	<b>1700/-</b>
<b>*Sithaka</b>	<b>FBOP</b>	<b>2450/-</b>
Pothotuwa	FBOP	2450/-
<b>*Greenwin Super</b>	<b>FBOP1</b>	<b>1900/-</b>
Sithaka	FBOP1	1900/-
Dullie Ella	FBOP1	1900/-
<b>*Sithaka</b>	<b>FBOP1</b>	<b>1850/-</b>
<b>*Wattahena</b>	<b>FBOP1</b>	<b>1850/-</b>
<b>*Ganganee</b>	<b>FBOPF</b>	<b>1950/-</b>
Co Op Lanka	FBOPF	1900/-
<b>*New Laksakanda</b>	<b>FBOPF</b>	<b>1850/-</b>
<b>*Sithaka</b>	<b>FBOPF1</b>	<b>1700/-</b>
<b>*Hidellana</b>	<b>FBOPF1</b>	<b>1700/-</b>
Pothotuwa	FBOPF1	1700/-
New Vithanakande	FBOPF1	1700/-

**PREMIUM FLOWERY**

New Hopewell	FBOPFSP	5750/-
Rathmalgoda Super	FBOPFEXSP	5850/-
Garden Leaf Super	FBOPFEXSP1	6200/-

**Dust**

Moray	DUST	1160/-
Mattakelle	DUST1	1550/-
Ceciliyan CTC	PD	1360/-
Dellawa CTC	PD	1360/-

## COLOMBO AUCTION – WEEKLY GROSS SALE AVERAGES

SALE NO.26 OF 8<sup>th</sup> JULY, 2025

	2025			2024	
	Weekly	Month to Date	Year to Date	Weekly	Year to Date
Uva High Grown	1,016.73	1,006.80	1,034.11	1,122.68	1,113.58
Western High Grown	1,034.50	1,042.28	1,089.35	1,179.95	1,194.94
High Grown	1,028.09	1,029.87	1,071.89	1,159.06	1,168.96
Uva Medium	1,042.84	1,037.39	1,073.24	1,150.84	1,154.99
Western Medium	945.64	941.83	1,009.49	1,065.05	1,084.38
Medium Grown	982.98	976.72	1,030.41	1,098.24	1,108.39
Low Grown (Orthodox)	1,236.87	1,217.51	1,257.26	1,340.10	1,397.47
Combined L.G. (Orthodox + CTC)	1,220.58	1,198.39	1,243.48	1,314.39	1,372.34
Total	1,140.15	1,121.72	1,170.81	1,244.87	1,284.43

Private Sale Figures (07.07.2025 –12.07.2025) - 166,053.50 kgs

Cumulative - 5,694,663.18 kgs

### DETAILS OF TEAS AWAITING SALE

#### SALE NO: 28

Sale of 22<sup>nd</sup> /23<sup>rd</sup> July '25

#### SALE NO: 29

Sale of 29<sup>th</sup> /30<sup>th</sup> July '25

	<u>Lots</u>	<u>Qty. (Kgs)</u>	<u>Lots</u>	<u>Qty. (Kgs)</u>
Low Grown Leafy	2,112	836,355	2,036	790,729
Low Grown Semi Leafy	1,598	697,770	1,593	682,690
Low Grown Tippy	1,984	927,161	2,018	942,071
High & Medium	1,749	787,170	1,795	776,837
Off Grade/BOP1A	2,649	1,413,184	2,434	1,307,924
Dust	567	504,756	481	418,956
Premium Flowery	398	57,723	456	64,156
Ex-Estate	<u>739</u>	<u>713,699</u>	<u>786</u>	<u>754,795</u>
Total	<u>11,796</u>	<u>5,937,818</u>	<u>11,599</u>	<u>5,738,158</u>



## **FUTURE CATALOGUES CLOSURE**

### **Sale No.30 of 04<sup>th</sup> (Mon.) /05<sup>th</sup> (Tue.) August, 2025**

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **17<sup>th</sup> July, 2025 at 04.30 p.m.**

### **Sale No.31 of 12<sup>th</sup> (Tue.) /13<sup>th</sup> (Wed.) August, 2025**

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **24<sup>th</sup> July, 2025 at 04.30 p.m.**

### **Sale No.32 of 19<sup>th</sup> (Tue.) /20<sup>th</sup> (Wed.) August, 2025**

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **31<sup>st</sup> July, 2025 at 04.30 p.m.**

## **SALE NO. 28**

## **AUCTION OF 22<sup>ND</sup> /23<sup>RD</sup> JULY, 2025**

## **BROKERS' SELLING ORDER**

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

## Crop & Weather

**For the period 08<sup>th</sup> to 15<sup>th</sup> July, 2025**

### Western/Nuwara Eliya Regions:-

Both regions reported bright weather and occasional showers throughout the week. Rain is expected in the Western and Nuwara Eliya regions in the week ahead, according to the Department of Meteorology.

### Uva/ Uda Pussellawa Regions:-

Sunny weather was reported in both regions throughout the week. The Department of Meteorology expects showers in the Uva and Uda Pussellawa regions in the week ahead.

### Low Grown:-

The Low Grown Region reported bright mornings and occasional evening showers throughout the week. According to the Department of Meteorology, fairly heavy showers are expected in the Low Grown Region in the week ahead.

### Crop Intake:-

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

### **WORLD CROP STATISTICS (MKGS)**

<i>Country</i>	<i>Month</i>	<i>2024</i>	<i>2025</i>	<i>Difference +/-</i>	<i>To-date 2024</i>	<i>To-date 2025</i>	<i>Difference +/-</i>
BANGLADESH	April	4.90	2.30	-2.60	6.70	3.90	-2.80
KENYA	March	54.30	37.90	-16.40	168.80	136.90	-31.9
MALAWI	April	6.00	6.80	0.80	26.80	24.90	-1.9
NORTH INDIA	April	63.76	72.99	9.23	112.94	133.43	20.49
SOUTH INDIA	April	12.28	22.23	9.95	61.26	69.71	8.45
SRI LANKA	May	24.65	25.37	0.72	104.80	113.95	9.15

*“Africa Tea Brokers Bulletin of Statist*

## **OTHER MARKETS**

### **LIMBE MARKET REPORT SALE 29 HELD ON 16/07/2025**

Less and selective demand prevailed this week for the 4300 packages on offer.

BP1 were 5USC easier on last.

PF1 tended firm to 2USC easier on last where sold.

PD were neglected.

D1 sold on last levels.

PF1SC – Few on offer sold 30-35USC below valuation.

Secondaries were firm to dearer where sold.

### **WEATHER/CROP FOR THE WEEK ENDING 13 JULY, 2025**

It was warm during the day with some cloud cover but the nights were cold. Some isolated rainfall were reported during the middle of the week, more in Thyolo.

All Estates reported reduced green leaf intakes.

## BANGLADESH AUCTION

### **SALE NO. 10 OF MONDAY, 14<sup>th</sup> July, 2025**

**CTC LEAF:** 51,588 packages of tea on offer met with an improved demand.

**BROKENS:** Well made good liquoring Brokens were in strong demand and were dearer upto Tk.5/- and occasionally more. Medium varieties were also a good market and were mostly firm to slightly dearer. Plainer sorts met with a fair demand at around last levels with some withdrawals. BLF teas once again sold well at firm to slightly dearer rates. These realised prices between Tk.170/- and Tk.233/.

**FANNINGS :** Well made good liquoring Fannings were a strong market and were firm to dearer following competition. Good Medium teas were also a good market and sold at firm to slightly dearer rates. Plainer sorts met with a fair demand at around last levels with some withdrawals. BLF teas once again sold well at firm to slightly dearer rates. These realised prices between Tk.170/- and Tk.233/

**DUST:** 12,748 packages of tea on offer met with a fairly good demand. Well made good liquoring Dusts had fairly good demand and sold well. Others again were an easier market and sold at a drop of Tk.5/- to Tk.8/- with some withdrawals. BLF Dusts again met with good demand and had only few withdrawals. Blenders lent strong support with fair interest from the Loose tea buyers.

**COMMENTS:** There was widespread demand this week generally noticeable for improved liquoring varieties which were often dearer. Blenders lent more support with Loose tea buyers operating in greater strength particularly for the well made sorts.

CDs were lower in demand and prices dropped substantially.

### **Quotations – This Week – (In Taka)**

Brokens	This Week	Last Week	Fannings	This Week	Last Week	Dust	This Week	Last Week
<b>Best</b>	<b>260-275</b>	255-275	<b>Best</b>	<b>255-270</b>	255-275	<b>PD</b>	<b>245-283</b>	245-276
<b>Good</b>	<b>250-260</b>	249-252	<b>Good</b>	<b>250-255</b>	249-252	<b>RD</b>	<b>213-326</b>	245-315
<b>Medium/Plain</b>	<b>245-250</b>	245-247	<b>Medium/Plain</b>	<b>245-250</b>	245-247	<b>D</b>	<b>221-325</b>	245-336
						<b>CD</b>	<b>225-292</b>	245-380
<b>BLF</b>	<b>170-233</b>	170-229	<b>BLF</b>	<b>170-233</b>	170-225	<b>BLF</b>	<b>221-244</b>	185-250

## **MOMBASA TEA AUCTION MARKET REPORT**

### **Sale No.28 of 14<sup>TH</sup> & 15<sup>TH</sup> JULY, 2025**

There was good general demand for the 219,940 packages(14.83m/kgs) available in the market; 45.60% was unsold.

### **MARKET:**

**Pakistan Packers** and **Bazaar** were strong with **Yemen** and **other Middle Eastern countries** active. **Kazakhstan** and **other CIS states** lent more and useful support with **Afghanistan** more active. **Egyptian Packers** maintained participation. **UK** were active with improved interest from **Russia**. **Sudan** remained absent while **South Sudan** showed some enquiry. **Local Packers** were quiet while **Somalia** were more active at the lower end of the market.

### **OFFERINGS**

Leaf Grades - 123,070 packages (08.08m/kgs) – 51.66% unsold.  
 Dust Grades - 75,960 packages (05.67m/kgs) – 46.34% unsold.  
 Secondary Grades - 20,580 packages (11.07m/kgs) – 13.80% unsold.

### **LEAF GRADES (M2 & M3)**

#### **BP1:**

**Best :** Were irregular and varied between steady to USC56 dearer but some lines lost up to USC26.  
**Brighter:** Were irregular and ranged between firm to USC23 above last levels to easier by up to USC14.  
**Mediums:** KTDA mediums held value with some teas gaining by USC4. Plantation mediums appreciated by up to USC15 where sold.  
**Lower Medium:** Met improved enquiry and advanced by up to USC32.  
**Plainer:** Gained by up to USC12.

#### **PF1:**

**Best :** Appreciated by up to USC28.  
**Brighter :** Gained up to USC 14 but select invoices lost up to USC3.  
**Mediums :** KTDA mediums were steady to USC14 dearer to easier by up to USC27 with plantation mediums irregular and ranged between USC2 above last levels to mostly easier by up to USC7.  
**Lower Medium :** Saw improved absorption and varies between mostly dearer by up to USC14 but some lines shed up to USC4.  
**Plainer :** Saw irregular enquiry raging between firm to USC15 above previous levels to easier by up to USC7.

**DUST GRADES (M1)****PDUST:**

- Best:** Met irregular interest varying between firm to USC6 dearer to mostly easier by up to USC24.
- Brighter:** Were irregular and ranged between steady to USC11 dearer to USC22 below previous rates.
- Mediums:** KTDA mediums were firm to easier by up to usc6 while plantation mediums saw irregular enquiry varying between USC3 dearer to mostly easier by up to USC6.
- Lower Medium:** Appreciated by up to USC11.
- Plainer:** Irregular ranging between steady to USC9 dearer to USC6 below previous levels .

**DUST1:**

- Best:** Steady to USC15 above previous levels to easier by up to USC9.
- Brighter:** More irregular enquiry ranging between USC12 dearer to easier by up to USC14.
- Mediums:** KTDA mediums were firm to USC 8 with plantation mediums steady to USC6 above previous rates.
- Lower Medium:** Were up to USC2 dearer.
- Plainer:** Firm to USC7 dearer to USC5 below previous levels.

**SECONDARY GRADES(S1)**

In the Secondary Catalogues, best **BPs** were to USC17 dearer for some best categories with better sorted **PFs** mostly selling above previous levels while others were steady . Clean well sorted coloury **Fannings** held value with **similar DUSTs** firm to dearer. **Other Fannings** were steady while **DUSTs** gained. **BMFs** were well absorbed at dearer rates.

*July 16, 2025*  
*-/ra.*



# International Tea News

## India's Tea Production Soars in 2025: Assam Leads the Charge

India's tea output surged 26% to 336.2 mkg in Jan-May 2025, led by Assam and Dooars. Prices rose, with North Indian teas fetching ₹195.63/kg on average.



India's [tea production](#) has seen a remarkable surge in the first five months of 2025, with total output reaching 336.2 million kilograms (mkg) — a 26% increase over the same period in 2024, according to the latest figures released by the [Tea Board of India](#). The spike is largely driven by a bumper harvest in North India, especially Assam, which continues to dominate the country's tea landscape.

### Assam's Strong Rebound

According to the report produced by leading tea broking house J Thomas, Assam, the heartland of India's tea industry, contributed 131.93 mkg till May 2025 — up from 115.65 mkg last year. This represents a 14% year-on-year growth. Within Assam, the Assam Valley region alone produced 125.77 mkg, recording a 16% increase.

However, Cachar saw a decline of 16%, continuing its recent downward trend.

Despite the gains, total production in Assam is still 8% below its 2023 levels, raising questions about long-term structural issues in areas like Cachar and plateauing yields in legacy gardens.

## India's Overall Production at Record High

India's tea industry witnessed an all-India increase of 68.86 mkg in the January–May 2025 period compared to 2024 — an unprecedented jump.

Key highlights include:

North India (Assam, West Bengal, and others):

Grew from 192.18 mkg to 240.29 mkg — a 25% rise.

South India (Tamil Nadu, Kerala, Karnataka):

Registered 95.93 mkg, up 28% from 75.18 mkg in 2024.

Regions like Dooars and Terai in West Bengal posted the highest growth, with Dooars alone expanding output by 36% year-on-year.

## Global Context: India Overtakes Key Producers

India's rise is especially significant as global competitors showed mixed trends:

Sri Lanka: Increased by 9.1 mkg.

Kenya: Dropped significantly by 31.9 mkg.

Bangladesh and Malawi: Showed marginal shifts.

India now accounts for over 53% of tea output among the major producing nations, reaffirming its position as a global tea powerhouse.

## Category-wise Trends

From January to May 2025, the production breakdown is as follows:

CTC (Crush-Tear-Curl): 288.89 mkg

Orthodox: 41.86 mkg

Darjeeling: 1.34 mkg

Green Tea: 4.13 mkg

CTC continues to dominate, particularly in Assam and Dooars. Orthodox tea, while niche, has maintained price premiums, especially in North India.

## Market and Price Trends

The average sale price of tea in India till June 2025 stood at ₹176.69/kg, up from ₹163.39/kg in 2024.

Notably:

North Indian teas fetched ₹195.63/kg

South Indian teas averaged ₹133.97/kg

Assam CTC and Orthodox teas fetched premium rates in auctions, with strong demand in both domestic and export markets. However, sales volumes showed only modest growth, suggesting possible oversupply or weaker demand in certain segments.

## Sri Lanka Group expands investment in Fiji



EXPANSION plans in Fiji by Sri Lankan conglomerate Aitken Spence PLC through its subsidiary company Elpitiya Plantations has finally made progress since initially exploring opportunities in the country last year.

Aitken Spence PLC, a prominent Sri Lankan conglomerate specialising in the agricultural sector, was exploring initial plans to introduce cutting-edge agricultural technologies and exploring renewable energy solutions to enhance Fiji's agricultural productivity and sustainability.



During their visit in 2024, the Aitken Spence delegation held discussions with local brands like Ranadi Plantations, Nature's Way Cooperative, Jack's Mango Farm and Bula Coffee.

The visits were facilitated by Government investment arm Investment Fiji and was aimed at identifying and developing viable agricultural opportunities in Fiji.

Aitken Spence board director Dr Rohan Fernando said their approach was comprehensive in encompassing everything from innovative farming practices to advanced processing techniques, with a strategic focus on both local consumption and export markets.

"Fiji presents a wealth of opportunities for commercial farming, particularly in sectors such as papaya, pineapples, dragon fruits, berries, coffee, tea, mangoes, cinnamon, lime and passion fruit," Dr Fernando said.

Earlier this week, Investment Fiji took to social media to announce that the team from Aitken Spence is back in the country and now in the process of finalising land arrangements for their proposed pilot site.

The proposed site is located at Nawaicoba in Nadi where Investment Fiji and the visiting delegation held productive discussions with the landowner on Tuesday.

Investment Fiji further announced that the visiting delegation was now back in Fiji to officially register their company and explore strategic partnerships with local stakeholders.

"This morning, the delegation met with the Investment Fiji chief executive officer Kamal Chetty to further discuss project progress which aims to bring advanced agricultural practices, employment opportunities, and export potential in the Agricultural sector," Investment Fiji stated.

Investment Fiji plays a critical role in facilitating the visit, offering insights into Fiji's investment climate, connecting Aitken Spence with local partners and providing guidance on regulatory and economic aspects.

The growing investment opportunities in Fiji can potentially reduce Fiji's reliance on imported agricultural products and open new export markets.

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