

TEA MARKET REPORT

SALE NO: 46

November 25 & 26, 2025



LANKA COMMODITY BROKERS LTD

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COMMENTS

This week's Tea Auction, namely Sale #46 was held on November 25 (Tue.)/26 (Wed.), 2025. A total weight of 5.7 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 2.6 MKGS, while the Main Sale High & Medium segment had 0.6 MKGS. The Ex Estate category had 0.8 MKGS.

In the Ex-Estate catalogues which were sold today, the market for the better BOP's continued to be irregularly easier whilst their corresponding BOPF's were irregular. Best Western BOP's declined by Rs.50-80/- per kg, whilst their BOPF's were firm following quality. Below best BOP's/BOPF's were firm whilst the thinner liquoring teas lost Rs.20/- per kg on average. The majority of the Nuwara Eliya teas remained unsold. UVa/Udapussellawa BOP's were firm to Rs.50/- per kg easier, whilst their BOPF's were firm on last levels. CTC Teas – High grown PF1's sold around last levels, whilst Medium PF1's which commenced around last levels declined sharply towards the close. Low Grown PF1's were generally easier. There were hardly and BP1's on offer this week. Buyers for Japan, the Continent and South Africa were very selective in their purchases whilst the others were selectively absorbed by Shippers to Russia, CIS, China & Hongkong.

Low Grown teas met with widespread demand this week. Leafy grades together with the small leaf teas sold at firmer levels whilst Bright Tippy Teas too met with strong demand. Lower end teas too held firm. Traditional markets were active.

Next week sale No.47 will be held on Monday 1st and Tuesday 2nd December, 2025 due to the intervening Poyaday Holiday.

THIS WEEK'S CATALOGUE CLOSURE - SALE NO. 49.

Please note that the closure of catalogues, **both Ex-Estate and Main Sale for Sale No. 49** which is scheduled to be catalogued on Thursday, 27th November, 2025 is extended up to ***Friday, 28th November till 5 p.m.***

This week's auction comprised of **11,730** lots with a total quantity of **5,762,191** Kgs.

In Lighter Vein

The catalogue wise breakdown was as follows:-

The Baked Potato Dilemma

Submitted by Dan the Man 009

Stepping up to the counter at the fast-food restaurant, I asked for a baked potato with butter on the side.

With the gusto of someone newly employed, the teenager taking my order asked,

	<u>Lots</u>	<u>Qty. (Kgs)</u>
Low Grown Leafy	2,105	805,819
Low Grown Semi Leafy	1,800	777,765
Low Grown Tippy	2,103	1,007,946
High & Medium	1,557	646,918
Off Grade/BOP1A	2,400	1,250,106
Dust	550	464,219
Premium Flowery	434	56,214
Ex-Estate	<u>781</u>	<u>753,204</u>
Total	<u>11,730</u>	<u>5,762,191</u>

LOW GROWN TEAS

LEAFY/SEMI LEAFY

BOP1 : Select best and best types were firm whilst the balance tended irregular.

OP1 : Teas in the select best category were maintained. Best types declined by Rs.50-100/- per kg. Stalky invoices were firm on last week levels.

OP : Well made OP's were maintained whilst the balance tended irregular. Secondary types too declined further.

OPA : Select best types maintained whilst the balance tended irregular.

PEK/PEK1 : Well-made PEK's were maintained whilst the balance were irregularly lower. Shotty PEK1's were firm to lower and the balance were maintained on last week levels.

Quotations (Rs./Kg)		BOP1	OP1	OP	OPA	PEK/PEK1
SELECT BEST	This Week	2300-2900	2400-3400	1500-1700	1500-1900	2100-2550
	Last Week	2300-3050	2400-3400	1500-1650	1500-1950	2200-2550
BEST	This Week	1700-2200	1600-2350	1250-1450	1300-1450	1800-2050
	Last Week	1600-2250	1750-2350	1250-1450	1300-1450	1800-2150
BELOW BEST	This Week	1400-1650	1300-1550	1050-1200	1100-1260	1400-1750
	Last Week	1300-1550	1300-1700	1100-1200	1150-1250	1400-1750
SECONDARIES	This Week	1000-1300	1000-1250	900-1050	900-1050	1000-1300
	Last Week	1050-1250	1000-1250	1000-1050	950-1100	1100-1250
POOR	This Week	800-1000	700-900	600-850	600-850	900-1000
	Last Week	800-100	700-950	600-950	650-900	900-1050

TIPPY/SMALL LEAF

BOP/BOPSP : High priced BOP's were easier, whilst the others sold around last levels.

BOPF/BOPFSP : Firm in general.

FBOP/FBOP1 : Few select best invoices were firm on last, whilst the others sold around last levels. However few select FBOP1's were firm whilst others were irregular.

FBOPF/FBOPF1 : Well-made FF1's together with cleaner teas were firm, whilst others irregular following quality. Few selected FF invoices were firm on last, others were irregular.

FBOPFSP : Very tippy maintained, whilst others were irregular following quality.

FFEXSP/SP1 : Overall long tippy teas easier by Rs.100-150/- per kg. Teas bottom at firm.

Quotations (Rs./Kg)		BOP/ BOPSP	BOPF/ BOPFSP	FBOP/ FBOP1	FBOPF/ FBOPF1	FBOPFSP/ FBOPFEXSP
SELECT BEST	This Week	2150-2350	1650-2050	1800-2600	1650-2400	5200-6200
	Last Week	2200-2450	1600-2250	1850-2650	1650-2200	5200-6200
BEST	This Week	1600-2050	1380-1550	1500-1750	1440-1600	3500-4400
	Last Week	1650-2150	1380-1550	1550-1800	1420-1600	3500-4600
BELOW BEST	This Week	1360-1550	1240-1360	1380-1450	1300-1400	2200-3400
	Last Week	1360-1600	1220-1340	1400-1500	1300-1380	2200-3700
SECONDARIES	This Week	1040-1300	980-1220	1160-1340	1160-1240	1450-1800
	Last Week	1050-1300	980-1200	1150-1350	1180-1260	1400-1750
POOR	This Week	880-1000	800-940	900-1060	900-1000	1120-1360
	Last Week	900-1000	790-920	880-1060	920-1100	1100-1350

MEDIUM GROWN LEAFY/SEMI LEAFY TEAS

FBOP : Well-made FBOP's were easier whilst the below best sold around last levels.

FBOPF/FBOPF1 : Well-made FBOPF1's together with the cleaner below best were firm, whilst the balance and the lower end were firm to dearer.

PEK/PEK1 : Well-made PEK/PEK1's were firm on last, whilst the below best together with mixed open varieties were easier.

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	1450-1850	1500-2100	1380-1480	1400-1500	860-1350	900-1400
FBOPF/FBOPF1	1400-1650	1400-1800	1240-1380	1250-1400	950 -1250	1000 -1250
PEK/PEK1	1750-2050	1750-2100	1400-1700	1400-1750	830-1350	850-1400

HIGH GROWNS TEAS

MARKET : Better BOP's continued to be irregularly easier, whilst the corresponding BOPF's were irregular. Teas at the lower end sold around last

BOP : Best Western's declined by Rs.50-80/- per kg. Teas in the Below Best and Plainer categories were generally firm. Nuwara Eliya's were mostly unsold. Uda Pussellawa's declined by Rs.50/- per kg, whilst the Uva's were firm and up to Rs.20/- per kg easier.

BOPF : Teas in the Best and Below Best categories were firm subject to quality. At the lower end, select coloury sorts gained by Rs.20-40/- per kg, whilst the other lighter thinner liquoring types which were firm at the commencement of the sale, declined by an average Rs.20/- per kg towards the close. Nuwara Eliya's were mostly unsold. Uva/Uda Pussellawa's were firm following quality.

Quotations (Rs./Kg)	BOP		BOPF	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Best Westerns	1240 - 1380	1240 - 1360	1340 - 1500	1300 - 1440
Below Best Westerns	1160 - 1220	1160 - 1220	1260 - 1320	1260 - 1280
Plainer Westerns	1120 - 1140	1080 - 1140	1020 - 1240	1200 - 1240
Nuwara Eliyas	N/A	N/A	N/A	1200
Brighter UdaPussellawas	1140 - 1160	1180	1180 - 1250	1200 - 1240
Other Uda Pussellawas	1080 - 1120	1100 - 1160	1080 - 1120	1100 - 1180
Best Uva's	1260 - 1280	1160 - 1260	1240 - 1260	1160 - 1280
Other Uva's	1180 - 1240	800 - 1000	1200 - 1220	860 - 920

MEDIUM GROWN TEAS

BOP : A few select Large Leaf teas were substantially dearer, whilst the others sold around last.

BOPF : Better sorts were firm and Rs.20/- per kg dearer, whilst the poorer types were neglected and unsold.

Quotations (Rs./Kg)	BOP		BOPF	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Best Westerns	830 - 2000	1200-1850	900-1300	900-1280

CTC TEAS

HIGH GROWN:-

BP1 - Hardly any offerings

PF1 - Sold around last.

MEDIUM GROWN:-

BP1 - Irregular.

PF1 - Teas In the higher price bracket declined by Rs.50/- per kg and more towards the close, whilst the others which commenced around last week's levels declined sharply towards the close.

LOW GROWN:-

BP1 - Hardly any offerings.

PF1 - A select range of teas were firm following special inquiry, whilst the others were easier.

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	1100 - 1180	1080-1200
Medium	1020 - 1200	840 - 1100	620 - 1160	580 - 1160
Low	650 - 1220	1040 - 1400	620 - 1460	650 - 1460

OFF GRADES

FGS/FGS1 : Select best liquoring FNGS/FNGS1's lost Rs.20-40/- per kg whilst, below Best types tended irregular. Low Grown select best FNGS/FNGS1's firm to lower by Rs.20/- per kg whilst others further lower. Select best BM's held firm; others firm to dearer by Rs.10-20/- per kg.

BOP1A : Select best BOP1A's firm on last. Best Teas little lower Rs.10-20/- per kg and poorer teas tending irregular.

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)	920-1220	920-1240	800-870	800-870	820-870	820-880
Good Fannings (CTC)	820-840	820-840	720-770	720-770	750-820	750-820
Other Fannings (Orthodox)	740-750	740-750	725-750	725-750	750-800	750-800
Other Fannings (CTC)	N/A	N/A	N/A	N/A	N/A	N/A
Good BM's	820-890	820-890	820-900	820-900	830-930	830-930
Other BM's	630-740	620-730	630-760	620-750	630-780	630-770
Best BOP1As	750-820	750-820	810-860	810-860	1200-1500	1200-1500
Other BOP1As	720-770	730-770	720-770	720-780	720-780	720-790

DUST

DUST/DUST1: Select best high grown maintained last levels, whilst their secondaries and below best types were irregular and mostly lower. Mid grown teas were Rs.30-60/- per kg lower, whilst Low Grown were firm on last levels.

PD : High grown were Rs.40-60/- per kg lower, whilst mid grown maintained last levels. Low Grown were irregularly lower by Rs.20-60/- 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 Primary Dust1 (Orthodox)	840 - 1650	850 - 1600	850 - 1260	840 - 1240	780 - 1460	770 - 920
Good Primary PD (CTC)	830 - 1160	840 - 1160	820 - 1200	840 - 1160	830 - 1440	840 - 1420
Secondary Dust	800 - 1220	820 - 1220	800 - 960	800 - 920	780 - 980	770 - 940

WESTERN MEDIUM

*Ancoombra	BOP	2000/-
Dartry Valley	BOP	1900/-
Nayapane	BOP	1900/-
* Harangalla	BOP	1850/-
*Uplands	BOPSP	1500/-
*Ancoombra	BOPSP	1500/-
Kenilworth	BOPSP	1460/-
*Hatale	BOPSP	1440/-
Vellai Oya	BOPF	1300/-
*Ancoombra	BOPFSP	1320/-
*Uplands	BOPFSP	1220/-
New Rothschild	BOP1	1600/-
Harangalla	FBOP/ FBOP1	1850/-
Craighead	FBOPF/ FBOPF1	1650/-
*Ancoombra	FBOPF/ FBOPF1	1600/-
Dartry Valley	FBOPF/ FBOPF1	1600/-
Harangalla	FBOPF/ FBOPF1	1600/-
Dartry Valley	OP/OPA	1360/-
*Hatale	OP/OPA	1340/-
Hill Castle	OP1	1500/-
*Galgewatta	PEK/PEK1	2050/-
*Meezan	PEK/PEK1	1950/-
Harangalla	PEK/PEK1	1950/-
Craighead	PEK/PEK1	1950/-
Doombagastalawa	PEK/PEK1	1950/-
Castle Milk	PEK/PEK1	1950/-

WESTERN HIGH

Inverness	BOP	1480/-
Queensberry	BOPSP	1420/-
Annfiled	BOPSP	1420/-
Robgill	BOPF/BOPFSP	1500/-
Inverness	BOP1	1480/-
Inverness	FBOP/ FBOP1	1800/-
Glenloch	FBOPF/ FBOPF1	1460/-
Fairlawn	FBOPF/ FBOPF1	1460/-
Bogahawatte	FBOPF/ FBOPF1	1460/-
Venture	OP/OPA	1260/-
Inverness	OP1	1500/-
Bambrakelly	PEK/PEK1	1800/-
Bogahawatte	PEK/PEK1	1800/-

NUWARA ELIYA

Court Lodge	BOP	1240/-
Kenmare	FBOP/ FBOP1	1260/-
Kenmare	FBOPF/ FBOPF1	1340/-
Court Lodge	OP/OPA	920/-
Court Lodge	PEK/PEK1	1100/-

CTC TEAS**HIGH GROWN**

Dunsinane CTC	PF1	1180/-
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MEDIUM GROWN

Strathdon CTC	BP1	1200/-
Strathdon CTC	PF1	1160/-

LOW GROWN

Suduwelipothahena CTC	BP1	1220/-
Hingalgoda CTC	PF1	1460/-

UVA MEDIUM

Halpewatta Uva	BOP	1600/-
Hindagala	BOPSP	1480/-
Dickwella	BOPF/ BOPFSP	1500/-
Dickwella	BOP1	1800/-
Telbedde	FBOP/ FBOP1	1850/-
Sarnia Plaiderie	FBOPF/ FBOPF1	1550/-
Ambrosia Uva	OP/OPA	1380/-
Telbedde	OP1	1600/-
Aruna Passara	PEK/PEK1	1950/-

UVA HIGH

Nayabedde	BOP	1280/-
Uva Highlands	BOPSP	1460/-
Ranaya	BOPSP	1460/-
Pitaratmalie	BOPF/ BOPFSP	1260/-
Uva Highlands	BOP1	1650/-
Ellathota Uva	FBOP/ FBOP1	1650/-
Ranaya	FBOPF/ FBOPF1	1550/-
Craig	OP/OPA	1240/-
Ellathota Uva	OP1	1550/-
Oodoowerre	PEK/PEK1	1900/-

UDAPUSSELLAWA

Mooloya	BOP	1180/-
Maha Uva	BOPSP	800/-
Luckyland	BOPF/ BOPFSP	1240/-
Mooloya	BOPF/ BOPFSP	1240/-
High Forest	BOPF/ BOPFSP	1240/-
Delmar	FBOP/ FBOP1	1460/-
Gonapitiya	FBOPF/ FBOPF1	1550/-
Maha Uva	OP/OPA	1280/-
Maha Uva	OP1	1440/-
Maha Uva	PEK/PEK1	1600/-

OFF GRADES

*Laksakanda	BP	1420/-
*Laksakanda	BP	1400/-
*Andaradeniya Hills	BP	1320/-
*Chandrika CTC	PF	1120/-
Ceciliyan CTC	PF	1060/-
*Chandrika CTC	PF	980/-
Lakshmi	BM	1140/-
Wattegodde	FNGS/ FNGS1	1300/-
*Chandrika Estate	BOP1A	1600/-
*Aldora	BOP1A	1600/-
Bogoda	BOP1A	1600/-
Aldora	BOP1A	1550/-
*Chandrika Estate	BOPA	1460/-

LOW GROWN LEAFY GRADES

Pothotuwa	BOP1	2900/-
Mulatiyana Hills	BOP1	2600/-
*Sithaka	BOP1	2450/-
Dampahala	OP1	3400/-
Berubeula	OP	1700/-
Sihara	OP	1550/-
Sunrise	OP	1550/-
Mulatiyana Hills	OP	1550/-
Hedigalla	OP	1550/-
Rotumba	OP	1550/-
Koppakanda	OP	1550/-
Bogada Group	OP	1550/-
*Allen Valley	OP	1500/-
Liyonta	OPA	1900/-
Lumbini	PEKOE	2450/-
Liyonta	PEKOE1	2600/-
Lions	PEKOE1	2550/-
*Andaradeniya S	PEKOE1	2450/-

LOW GROWN TIPPY GRADES

*Mahaliyadda	BOP	2350/-
*Himora	BOP	2350/-
New Spring View	BOPSP	2550/-
Kamarangapitiya	BOPSP	2000/-
*Andaradeniya S	BOPSP	1950/-
Parakaduwa Super	BOPF	1950/-
*Ganganee	BOPF	1800/-
*Elaine Super	BOPF	1700/-
Rajjuruwatta Super	BOPFSP	2050/-
New Spring View	BOPFSP	1900/-
*Wattahena	BOPFSP	1700/-
*Sithaka	FBOP	2600/-
*Sithaka	FBOP1	2250/-
Rajjuruwatte Super	FBOPF	2250/-
Danawala	FBOPF	1900/-
*New Laksakanda	FBOPF	1800/-
Rajjuruwatte Super	FBOPF1	2400/-
Nelun Dalla	FBOPF1	1800/-
*Sithaka	FBOPF1	1700/-

PREMIUM FLOWERY

Aruna	FBOPFSP	6200/-
Kings Bru	FBOPFEXSP	5750/-
Rajjuruwatta Super	FBOPFEXSP1	5500/-

Dust

Bridwell	DUST	1220/-
Wattegodde	DUST1	1650/-
Great Western	DUST1	1650/-
Ceciliyan CTC	PD	1440/-

COLOMBO AUCTION – WEEKLY GROSS SALE AVERAGES

SALE NO.45 OF 19TH NOVEMBER, 2025

	2025			2024	
	Weekly	Month to Date	Year to Date	Weekly	Year to Date
Uva High Grown	1,075.55	1,077.53	1,043.51	999.99	1,101.20
Western High Grown	1,212.49	1,205.71	1,121.26	1,125.39	1,187.11
High Grown	1,169.39	1,166.76	1,096.29	1,091.16	1,159.36
Uva Medium	1,071.01	1,062.00	1,068.79	1,002.76	1,125.86
Western Medium	1,003.25	995.02	1,006.89	966.55	1,052.38
Medium Grown	1,024.12	1,012.19	1,026.28	976.71	1,076.76
Low Grown (Orthodox)	1,306.83	1,287.92	1,265.56	1,211.78	1,353.51
Combined L.G. (Orthodox + CTC)	1,285.22	1,262.14	1,248.99	1,197.90	1,330.78
Total	1,223.70	1,201.82	1,180.04	1,141.00	1,251.78

Private Sale Figures (13.11.2025 – 19.11.2025)

285,166.00

Cumulative

9,555,326.26

DETAILS OF TEAS AWAITING SALE

SALE NO: 47

SALE NO: 48

Sale of 01st /02nd Dec. '25

Sale of 09th /10th Dec. '25

	<u>Lots</u>	<u>Qty. (Kgs)</u>	<u>Lots</u>	<u>Qty. (Kgs)</u>
Low Grown Leafy	1,983	756,716	2,094	808,831
Low Grown Semi Leafy	1,527	634,565	1,722	724,589
Low Grown Tippy	1,840	842,603	1,998	917,888
High & Medium	1,440	616,923	1,718	771,422
Off Grade/BOP1A	2,411	1,221,160	2,409	1,243,689
Dust	521	436,501	515	457,498
Premium Flowery	312	41,806	366	48,156
Ex-Estate	<u>751</u>	<u>713,458</u>	<u>826</u>	<u>786,236</u>
Total	<u>10,785</u>	<u>5,263,732</u>	<u>11,648</u>	<u>5,758,309</u>

FUTURE CATALOGUES CLOSURE

Sale No.49 of 15th (Mon.) /16th (Tue.) December, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **Friday 28th November, 2025 at 04.30 p.m.**

Sale No.50 of 22nd (Mon./One day Sale) December, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **Friday 05th December, 2025 at 04.30 p.m.**

Sale No.01 of 07th (Tue)/08th (Wed.) January, 2026

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **Thursday 11th December, 2025 at 04.30 p.m.**

SALE NO. 47

AUCTION OF 01st /02nd DECEMBER, 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. John Keells PLC	1. Mercantile Produce Brokers (Pvt) Ltd	1. Mercantile Produce Brokers (Pvt) Ltd
2. Asia Siyaka Commodities PLC	2. Forbes & Walker Tea Brokers (Pvt) Ltd	2. Eastern Brokers PLC
3. Lanka Commodity Brokers Ltd	3. Bartleet Produce Marketing (Pvt) Ltd	3. Asia Siyaka Commodities PLC
4. Mercantile Produce Brokers (Pvt) Ltd	4. Lanka Commodity Brokers Ltd	4. Forbes & Walker Tea Brokers (Pvt) Ltd
5. Eastern Brokers PLC	5. Ceylon Tea Brokers PLC	5. Lanka Commodity Brokers Ltd
6. Forbes & Walker Tea Brokers (Pvt) Ltd	6. Eastern Brokers PLC	6. Ceylon Tea Brokers PLC
7. Bartleet Produce Marketing (Pvt) Ltd	7. John Keells PLC	7. Bartleet Produce Marketing (Pvt) Ltd
8. Ceylon Tea Brokers PLC	8. Asia Siyaka Commodities PLC	8. John Keells PLC

Crop & Weather

For the period 19th to 25th November, 2025

Western/Nuwara Eliya Regions

Bright mornings and evening showers were reported in both regions throughout the week. According to the Department of Meteorology, rain is expected in the Western and Nuwara Eliya regions in the week ahead.

Uva/Uda Pussellawa Regions

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

Low Grown

Rain was reported in the Low Grown Region throughout the week. Intermittent showers are expected in the Low Grown Region in the week ahead according to the Department of Meteorology.

Crop Intake

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

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	Aug.	13.80	13.60	-0.2	49.50	49.50	0.0
KENYA	Aug.	36.87	38.62	1.8	402.79	359.16	-43.6
MALAWI	Aug.	1.60	1.40	-0.2	36.40	34.40	-2.0
NORTH INDIA	Sep.	147.00	138.60	-8.4	754.40	794.90	40.5
SOUTH INDIA	Sep.	23.00	21.30	-1.7	164.40	174.60	10.2
SRI LANKA	Oct.	21.30	21.80	0.5	218.10	220.90	2.8

OTHER MARKETS

LIMBE MARKET REPORT SALE 48 HELD ON 26/11/2025

There was less interest at firm to easier rates where sold for the 4,860 packages on offer.

BP1 sold 2USC easier on last.

PF1 single invoice fetched 6USC down on last, balance were taken out.

PD were neglected.

D1 held firm on last.

PF1SC selected invoices sold 4 USC easier on last, balance were taken out.

Secondaries were fully firm on last where sold.

WEATHER/CROP FOR THE WEEK ENDING 23 NOVEMBER, 2025

Useful rainfall were reported in the tea planting districts, particularly the earlier four day of the week, total average rainfall to 66 mm and 99 mm in Thyolo and mulanje resoectively.

Green leaf intakes continues low.

BANGLADESH AUCTION

SALE NO. 29 OF MONDAY, 24th NOVEMBER, 2025

CTC LEAF: 49,686 packages of tea on offer met with a stronger demand.

BROKENS: Well made good liquoring Brokens continued to be a strong market at dearer rates often by Tk.3/- to Tk.5/- Their smaller varieties attracted more competition and advanced further. Medium varieties were a strong market and were dearer by upto Tk.5/- over last. Plainer varieties received better enquiry and were firm to slightly dearer. Likewise BLF teas met with a strong demand and were a dearer market.

FANNINGS : Well made good liquoring Fannings were a strong feature of the market and were dearer by Tk.5/- and more. Medium varieties met with a strong demand and were a dearer market whilst the plainer teas were a good market and were firm to slightly dearer. BLF teas met with a strong demand and were a dearer market.

DUST: 10,235 packages of tea on offer met with strong demand. Good liquoring Dusts sold well at dearer rates. Their Mediums met with good competition and appreciated by Tk.5/- to Tk.8/- closely following quality. Plain/BLF Dusts also saw an improved demand with hardly any withdrawals. Both Blenders and Loose tea buyers lent strong support.

COMMENTS: here was a stronger demand with more competition this week with all sections of the market operating in greater strength. Blenders lent useful support with more interest from the Loose tea buyers. As a result, prices were higher and there were fewer withdrawals.

Dusts were a dearer market.

Quotations – This Week – (In Taka)

Brokens	This Week	Last Week	Fannings	This Week	Last Week	Dust	This Week	Last Week
Best	265-273	258-268	Best	265-275	258-268	PD	245-315	245-304
Good	255-262	252-257	Good	257-262	252-257	RD	245-320	230-342
Medium	249-254	247-250	Medium	250-255	247-25	D	245-361	255-306
Plain	245-248	245-246	Plain	245-248	245-246	CD	250-290	227-288
BLF	235-240	215-240	BLF	235-240	215-240	BLF	235-246	227-241

COURTESY: NATIONAL BROKERS LT



SOUTH INDIAN ROUNDUP

FOR THE WEEK ENDING – 22nd NOVEMBER, 2025

KOCHI

CTC LEAF

Demand : Good Demand: All grades sold at steady to dearer levels.

ORTHODOX LEAF

Demand : Good demand.

Buying Pattern : High grown and other whole leaves sold at barely steady levels except for the OP grades which were easier by Rs.8 to 10. Primary broken were fully firm and Secondary broken fetched prices irregular around last levels. Fannings were steady.

Market : CIS & Middle East Buyers operated.

DUST

Demand : Good demand.

Buying Pattern : Popular marks and better mediums sold at barely steady levels. Plain sorts also shared the same market trend

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

COONNOOR

CTC LEAF

Demand : Strong.

Market : The Brighter liquoring high-priced teas were trading irregularly with the BOPF's appreciating in prices. The major quantity that was traded were fully firm to dearer by Rs. 2/- to Rs. 3/- across all grades.

The overall sale percentage was 96% at an average of Rs. 109.57.

Buying Pattern: The Major Blenders and other Regional Packeteers continued to be the main stay whilst the Exporters were lending useful support operating mainly on the Larger Broken and Fannings. The Internal buying were rather price cautious.

ORTH LEAF

Demand : Good.

Market : Generally, an easier trend across all grades and categories with the prices dropping by Rs. 3/- to Rs. 5/- and upto Rs. 10/-.

The overall sale percentage was 81% at an average of Rs. 147.43.

Buying Pattern: Fairly strong export enquiry was forthcoming with select Internal participation witnessed.

CTC DUST

Demand : Fairly strong.

Market : The High-priced Brighter liquoring teas were rather irregular and lower sometimes. However, the medium categories across all grades and the finer grades of the Better Mediums witnessed a fully firm to dearer levels by Rs. 1/- to Rs. 2/- and more sometimes.

The overall sale percentage was 90% at an average of Rs. 113.27.

Buying Pattern: Yet again a strong Export enquiry was forthcoming with Vikrama Impex being strong. The Major Blender was lending a fair support alongwith other Internal buyers whilst Devagiri Tea & Produce continued to support on the Brighter liquoring teas.

ORTH DUST

Demand : Good.

Market: The market witnessed an irregular trend with the Primary grades of the popular marks alongwith the Tertiaries have moved up in prices by Rs. 2/- to Rs. 5/- and more sometimes following quality.

The overall sale percentage was 80% at an average of Rs. 111.35.

Buying Pattern: Exporters were the main stay with very select Internal buying.

COIMBATORE**CTC LEAF**

Demand : Good demand.

Market : Better medium and popular teas were irregular with some withdrawals. Medium teas were dearer by Rs.2/-, however BOPF's were dearer by Rs.4/- to Rs.5/- sometimes more. Plainer teas were dearer by Rs.3/- to Rs.5/- sometimes more.

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

ORTH LEAF

Demand : Fair demand.

Market : Medium brokenes were lower by Rs.2/- to Rs.4/ with few withdrawals. Secondary brokenes were lower with heavy withdrawals. Others not quotable.

Buying Pattern : Exporters were active.

CTC DUST

Demand : Good general demand.

Market : Better medium and popular teas were steady on bolder grades. Finer grades were lower by Rs.1/- to Rs.2/- sometimes more. Medium teas were steady to dearer by Rs.4/- to Rs.5/- on blacker cleaner teas sometimes more. Plainer teas were dearer by Rs.5/-.

Buying Pattern : All sections were active.

ORTH DUST

Demand : Fair demand.

Market : Irregularly lower with heavy withdrawals.

Buying Pattern : Exporters were selective.

MOMBASA TEA AUCTION MARKET REPORT

Sale No.46 of 17TH, 18TH & 19TH NOVEMBER, 2025

Good general demand for the 171,530 packages (11,506,094.00 kilos) on offer; 24.92% remained unsold.

MARKET:

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

OFFERINGS :

Orthodox Grades - 5,030 packages (184,024.00 kilos) – 69.38% unsold.
Leaf Grades - 83,960 packages (5,547,872.00 kilos) – 21.72% unsold.
Dust Grades - 65,280 packages (4,889,354.00 kilos) – 29.47% unsold.
Secondary Grades - 17,260 packages (931,116.00 kilos) – 10.31% unsold.

LEAF GRADES (M2 & M3)

BP1:

Best : Improved absorption gaining by up to USC63.
Brighter: More irregular ranging between USC18 dearer to easier by up to USC19.
Mediums: KTDA mediums were firm to USC13 dearer to easier by up to USC14 while plantation mediums saw less enquiry and shed by up to USC19.
Lower Medium: Met irregular activity and varied between USC6 dearer for a few teas to mostly easier by up to USC12.
Plainer: Less enquiry and shed by up to USC4.

PF1:

Best : Firm to USC7 dearer to USC8 below previous rates.
Brighter : Firm to USC8 dearer.
Mediums : KTDA mediums were steady to dearer by up to USC8 but select lines lost up to USC6 while plantation medium more irregular varying between USC13 dearer to easier by up to USC8.
Lower Medium : Irregularly shed by up to USC22.
Plainer : Improved absorption at firm to USC7 above last levels.

CTC QUOTATIONS	BP1 – USC	PF1 – USC
Best	246 – 494	290 – 372
Good	250 – 306	285– 318
Good Medium	230 – 268	280– 306
Medium (KTDA)	165 – 202	202 – 265
Medium (Plantations)	160– 194	170 – 211
Lower Medium	140 – 170	136– 197
Plainer	080– 123	089– 148

DUST GRADES (M1)**PDUST:**

Best: Were easier by up to USC20 but a few select invoices were up to USC10 above previous levels.

Brighter: Discounted by up to USC15.

Mediums: KTDA mediums were irregular ranging between USC5 dearer for a few lines to mostly easier by up to USC16. Plantation mediums were steady to USC4 dearer to USC11 below last rates.

Lower Medium: Mostly shed by up to USC6 with select invoices USC3 dearer.

Plainer: Irregular and mostly dearer by up to USC14 but some teas eased by up to USC8.

DUST1:

Best: Lost by up to USC19.

Brighter: Irregular enquiry varying between steady to USC12 dearer to USC6 easier.

Mediums: KTDA mediums were irregular and varied between USC6 above previous levels to USC4 easier while plantation mediums gained by up to USC7.

Lower Medium: Where sold, were up to USC3 below previous levels.

Plainer: Appreciated by up to USC12.

CTC QUOTATIONS	PDUST1 - USC	DUST1 - USC
Best	275 - 352	276 - 361
Good	260 - 317	265 - 312
Good Medium	225 - 293	245 - 300
Medium (KTDA)	165 - 230	175 - 266
Medium (Plantations)	152 - 197	150 - 163
Lower Medium	130 - 160	125 - 140
Plainer	085 - 126	084 - 124

SECONDARY GRADES(S1)

In the Secondary Catalogues, **BPs** held value with **PFs** steady. Clean well sorted coloury **Fannings** were irregularly firm while **similar DUSTs** sold at previous rates. **Other Fannings** held value with some lines selling above last levels while similar **DUSTs** were steady. **BMFs** were well absorbed.

SECONDARY QUOTATIONS (USC)	BP / BP2	PF / PF2	FNGS1 / FNGS	DUST / DUST2	BMF
Best / Good	214 - 316	232	150 - 250	146 - 264	-
Good Medium / Medium	-	-	144 - 208	110 - 186	-
Lower Medium	140 - 197	124 - 154	113 - 150	090 - 140	106 - 116
Plainer	089 - 098	080 - 117	084 - 115	084 - 105	094 - 109

November 26, 2025

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TEA NEWS

LOCAL :-

Publication – Sunday Ceylon Today

Headline – Watawala Tea Wins Gold Local Brand of the Year at SLIM Brand Excellence 2025

Journalist – N/A

Page No – 07

Summary - Watawala Tea is highlighted as Sri Lanka's No. 1 branded tea and is celebrated for winning Gold Local Brand of the Year and Silver for Product Brand of the Year at the SLIM Brand Excellence Awards 2025. The article describes how Watawala became a leading household name and a dominant force in the domestic tea market. Sunshine Consumer is presented as the largest branded tea company in the country, with flagship brands such as Zesta, Watawala Tea and Ran Kahata holding over 50% market share. The piece outlines the strength of these tea brands within Sri Lanka's FMCG landscape and notes their wide penetration across the grocery channel.

Publication – Daily FT

Headline - Tea export earnings rise to \$ 1.29 b in first 10 months of 2025

Journalist – N/A

Page – 01 Cont. 02

Summary - Sri Lanka earned \$1.29 billion from tea exports in the first ten months of 2025, a 9% increase from \$1.18 billion last year, with an approximate FOB value of \$5.86 per kg. October 2025 exports reached 21.88 Mnkg of tea, supported by higher shipments of tea packets and tea bags. Cumulative exports from January to October rose to 220.21 Mnkg, with all major categories except bulk tea recording positive variances. The cumulative FOB value averaged Rs. 1,754.28 per kg. Iraq remained the largest buyer of Ceylon Tea, followed by Russia and Türkiye, while Libya and Chile showed strong year-on-year growth in purchases.

Publication – Daily FT

Headline - Elpitiya Plantations celebrates dedication and excellence at Estate Staff Awards

Journalist – N/A

Page – 19

Summary - Elpitiya Plantations held award ceremonies for its Upcountry and Low Country estate staff, recognizing their dedication, hard work, and contributions to the company's plantations. The Upcountry event in Nuwara Eliya honoured over 100 estate employees for excellence in productivity, innovation, and long service. The Low Country ceremony in Hikkaduwa similarly recognized more than 100 staff members for individual and team achievements supporting plantation sustainability. Both occasions highlighted the vital role of estate workers in maintaining the quality and productivity of the plantations. Elpitiya Plantations noted that its estate staff are the pillars of the company and emphasized continued investment in training, career development, and wellbeing.
