

TEA MARKET REPORT

SALE NO: 47

December 8 & 9, 2025



LANKA COMMODITY BROKERS LTD

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COMMENTS

This week's Tea Auction, namely Sale #47 was held on December 8 (Mon.)/9 (Tue.), 2025. A total weight of 5.2 MKGS was on offer, which shows a decrease when compared to the previous week's quantity. The Low Grown Leafy, Semi Leafy, Tippy/Small Leaf & Premium Flowery catalogues totaled 2.2 MKGS, while the Main Sale High & Medium segment had 0.6 MKGS. The Ex Estate category had 0.7 MKGS.

This week Ex-Estate sale witnessed an improved demand with prices realizing a dearer trend. Best Western BOP's where quality was maintained gained Rs.20-40/-, whilst others sold around last levels. In the below best category, clean leaf teas with fair liquors appreciated by Rs.50/- and more whilst plainer sorts were Rs.20-40/- dearer. Best Western BOPF's in the high price bracket of the last sale were easier with the exception of the wider selection of better teas which appreciated up to Rs.50/-. In the below best category, clean leaf teas gained Rs.50-100/- whilst others advanced Rs.20-40/-. Lower end teas were upto Rs.20/- dearer. The majority of the Nuwara Eliya teas were firm to dearer. Uva/Udapussellawa BOP's gained upto Rs.50/-, whilst their corresponding BOPF's were fully firm to Rs.20-40/- dearer. CTC Teas – High & Medium PF1's sold around last levels whilst Low Grown declined Rs.20-40/-. There were hardly any BP1's on offer this week. There was strong and improved demand from shippers to Japan, the Continent and South Africa along with other shippers to Russia, CIS, China & Hongkong. The Tea bag sector was too active.

Demand for Low Grown teas in all categories continued to meet with strong inquiry and thus prices were fully firm to dearer alround. Bright Tippy Teas too maintained last auction price levels and at times more. Traditional markets continued to be operative.

Sale No.48 which was originally due to be held on 9th/10th December, 2025 has been re-scheduled for 15th/16th December 2025.

This week's auction comprised of **10,785** lots with a total quantity of **5,263,732** Kgs.

In Lighter Vein

LEGAL ADVICE

The catalogue wise breakdown was as follows:-

A doctor and a lawyer are talking at a party.

Their conversation is constantly interrupted by people describing their ailments and asking the doctor for free medical advice.

After an hour of this, the exasperated doctor asks the lawyer,

"What do you do to stop people from asking you for legal advice when you're out of the office?"

"I give it to them," replies the lawyer, "and then I send them a bill."

The doctor is shocked, but agrees to give it a try.

The next day, still feeling slightly guilty, the doctor prepares the bills. When he goes to place them in his mailbox, he finds a bill from the lawyer!

	<u>Lots</u>	<u>Qty. (Kgs)</u>
Low Grown Leafy	1,983	756,716
Low Grown Semi Leafy	1,527	634,565
Low Grown Tippy	1,840	842,603
High & Medium	1,440	616,923
Off Grade/BOP1A	2,411	1,221,160
Dust	521	436,501
Premium Flowery	312	41,806
Ex-Estate	<u>751</u>	<u>713,458</u>
Total	<u>10,785</u>	<u>5,263,732</u>

LOW GROWN TEAS

LEAFY/SEMI LEAFY

BOP1 : In general were firm to irregularly dearer.

OP1 : Select best invoices appreciated, whilst balance too dearer following quality. Stalky invoices too met with a good demand.

OP : A few select best OP's were dearer, whilst the balance too firm to irregularly dearer.

OPA : Teas in the select best category declined, whilst the balance appreciated. However the poorer sorts were eased substantially.

PEK/PEK1 : Pekoe's in general were dearer. Pek1's were maintained last week levels.

Quotations (Rs./Kg)		BOP1	OP1	OP	OPA	PEK/PEK1
SELECT BEST	This Week	2300-3000	2400-3600	1500-1850	1500-1700	2100-270
	Last Week	2300-2900	2400-3400	1500-1700	1500-1900	2100-2550
BEST	This Week	1750-2200	1700-2350	1300-1450	1350-1450	1800-2050
	Last Week	1700-2200	1600-2350	1250-1450	1300-1450	1800-2050
BELOW BEST	This Week	1450-1700	1350-1650	1100-1250	1100-1300	1400-1750
	Last Week	1400-1650	1300-1550	1050-1200	1100-1260	1400-1750
SECONDARIES	This Week	1100-1400	1100-1300	900-1050	900-1050	1100-1350
	Last Week	1000-1300	1000-1250	900-1050	900-1050	1000-1300
POOR	This Week	850-1100	750-1050	600-850	600-850	900-1050
	Last Week	800-1000	700-900	600-850	600-850	900-1000

TIPPY/SMALL LEAF

BOP/BOPSP : Firm to dearer

BOPF/BOPFSP : In general were firm.

FBOP/FBOP1 : Well-made FBOP's were firm to dearer, whilst the others sold around last levels. FBOP1's, in general, were firm.

FBOPF/FBOPF1 : Select best and best FBOPF1'S categories were firm to dearer, whilst the others too followed a similar trend. FBOPF's in general were dearer.

FBOPFSP : Small tippy varieties were fully firm to dearer. Teas at the lower end were irregular following quality

FFEXSP/SP1 : Long tippy varieties in general were lower.

Quotations (Rs./Kg)		BOP/ BOPSP	BOPF/ BOPFSP	FBOP/ FBOP1	FBOPF/ FBOPF1	FBOPFSP/ FBOPFEXSP
SELECT BEST	This Week	2200-2600	1650-2400	2100-2950	1650-2000	5000-6250
	Last Week	2150-2350	1650-2050	1800-2600	1650-2400	5200-6200
BEST	This Week	1600-2100	1400-1600	1600-1800	1440-1600	3600-4500
	Last Week	1600-2050	1380-1550	1500-1750	1440-1600	3500-4400
BELOW BEST	This Week	1380-1580	1260-1380	1400-1500	1320-1420	2300-3450
	Last Week	1360-1550	1240-1360	1380-1450	1300-1400	2200-3400
SECONDARIES	This Week	1060-1340	1000-1240	1200-1360	1180-1280	1420-1750
	Last Week	1040-1300	980-1220	1160-1340	1160-1240	1450-1800
POOR	This Week	890-1040	800-960	940-1120	880-1060	1060-1340
	Last Week	880-1000	800-940	900-1060	900-1000	1120-1360

MEDIUM GROWN LEAFY/SEMI LEAFY TEAS

- FBOP** : Select best and best invoices maintained last levels, whilst secondary types tended irregular. Tea at the lower end were firm and easier at times.
- FBOPF/FBOPF1** : Well-made neat invoices met with fair demand, teas at the below best were firm on last levels. Poorer sorts tended irregular towards the close.
- PEK/PEK1** : Well-made shotty PEK/PEK1's types were appreciated on last levels, secondary types tended firm to easier, bottom varieties irregularly lower.

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	1450-1950	1450-1850	1380-1450	1380-1480	860-1380	860-1350
FBOPF/FBOPF1	1450-1650	1400-1650	1250-1450	1240-1380	900 -1250	950 -1250
PEK/PEK1	1800-2000	1750-2050	1450-1800	1400-1700	800-1450	830-1350

HIGH GROWNS TEAS

MARKET : Improved activity and a firm to dearer trend in prices

BOP : Best Western's where quality was maintained, gained by Rs.20-40/- per kg, whilst the others sold around last week's levels. In the Below Best category, teas in the higher price bracket gained by Rs.20/- per kg, whilst the others together with the Plainer sorts appreciated by Rs.20-40/- per kg. Nuwara Eliya's were firm and dearer. Uda Pussellawa's gained by Rs.50/- per kg and more for the clean leaf teas. Uva's sold around last.

BOPF : Best Western's – Select high-priced teas were easier, whilst a wider selection of the better teas appreciated by up to Rs.50/- per kg. In the Below Best category, teas in the higher price bracket appreciated by Rs.20-40/- per kg, whilst the others together with teas at the lower end of the market were firm and Rs.20/- per kg dearer. Nuwara Eliya's were firm and dearer. Uva/Uda Pussellawa's were firm and Rs.20-40/- per kg dearer.

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

MEDIUM GROWN TEAS

BOP : Large Leaf teas were irregular though continued to sell reasonably well, whilst the others gained by Rs.20-40/- per kg.

BOPF : Better sorts were firm and Rs.20/- per kg dearer, whilst the others were generally firm.

Quotations (Rs./Kg)	BOP		BOPF	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Best Westerns	880 - 2050	830 - 2000	920-1320	900-1300

CTC TEAS

HIGH GROWN:-

BP1 - Hardly any offerings

PF1 - Firm.

MEDIUM GROWN:-

BP1 - Irregular.

PF1 - Mostly sold around last.

LOW GROWN:-

BP1 - Hardly any offerings.

PF1 - Declined by Rs.20-40/- per kg.

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 - 1160	1100 - 1180
Medium	500 - 1120	1020 - 1200	680 - 1220	620 - 1160
Low	650 - 1460	650 - 1220	650 - 1440	620 - 1460

OFF GRADES

FGS/FGS1 : Select best liquoring FNGS/FNGS1's appreciated Rs.25-50/- per kg whilst, below Best types tended irregular. Low Grown select best FNGS/FNGS1's firm on last whilst others firm to dearer Rs.20-40/-. Select best BM's advanced Rs.20-40/-, others firm to dearer by Rs.20-30/- per kg.

BOP1A : Select best BOP1A's firm on last. Best Teas advanced Rs.50-75/- per kg and best teas held firm. Poorer teas a little lower.

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)	920-1270	920-1220	800-870	800-870	820-870	820-870
Good Fannings (CTC)	820-840	820-840	720-770	720-770	750-820	750-820
Other Fannings (Orthodox)	740-750	740-750	760-800	725-750	700-800	750-800
Other Fannings (CTC)	N/A	N/A	N/A	N/A	N/A	N/A
Good BM's	820-920	820-890	820-930	820-900	830-960	830-930
Other BM's	630-760	630-740	630-780	630-760	630-800	630-780
Best BOP1As	750-820	750-820	810-860	810-860	1200-1500	1200-1500
Other BOP1As	700-770	720-770	700-770	720-770	700-790	720-780

DUST

DUST/DUST1: High grown liquoring Dust/Dust1's were fully firm to dearer by Rs.30-40/-, whilst their secondaries and below best types were firm on last levels. Mid grown teas sold firm on last levels. Whilst the select best Low grows met with improved demand and gained Rs.20-40/-.

PD : High grows were Rs.30-50/- dearer, whilst the Mid Grown teas were firm on last levels. Low grows were firm on last levels.

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)	870 - 1750	840 - 1650	860 - 1300	850 - 1260	800 - 1020	780 - 1460
Good Primary PD (CTC)	840 - 1260	830 - 1160	840 - 1220	820 - 1200	840 - 1420	830 - 1440
Secondary Dust	820 - 1240	800 - 1220	820 - 1120	800 - 960	800 - 1160	780 - 980

WESTERN MEDIUM

*Hatale	BOP	2050/-
*Ancoombra	BOP	2000/-
*Ancoombra	BOPSP	1550/-
*Ancoombra	BOPSP	1480/-
*Vellai Oya	BOPF	1320/-
*Vellai Oya	BOPF	1300/-
Craighead	BOPFSP	1120/-
Dartry Valley	BOP1	2200/-
*Hatale	BOP1	2000/-
Craighead	FBOP/FBOP1	1950/-
Harangalla	FBOP/FBOP1	1850/-
*Hatale	FBOP/FBOP1	1800/-
*Ancoombra	FBOPF/ FBOPF1	1650/-
*Hatale	FBOPF/ FBOPF1	1650/-
Dartry Valley	FBOPF/ FBOPF1	1650/-
Harangalla	FBOPF/ FBOPF1	1650/-
Craighead	FBOPF/ FBOPF1	1650/-
Doombagastalawa	FBOPF/ FBOPF1	1650/-
*Hatale	OP/OPA	1320/-
*Meezan	OP/OPA	1320/-
*Galgewatta	OP/OPA	1320/-
*Galgewatta	OP/OPA	1300/-
Harangalla	OP/OPA	1300/-
*Hatale	OP1	1600/-
Craighead	PEK/PEK1	2000/-
New Rothschild	PEK/PEK1	2000/-
Inguruwatte Super	PEK/PEK1	2000/-
*Galgewatta	PEK/PEK1	1950/-
*Meezan	PEK/PEK1	1950/-
Dartry Valley	PEK/PEK1	1950/-
*Meezan	PEK/PEK1	1900/-
*Hatale	PEK/PEK1	1900/-
Harangalla	PEK/PEK1	1900/-

WESTERN HIGH

Wattegodde	BOP	1440/-
Ingestre	BOPSP	1480/-
Robgill	BOPF/BOPFSP	1440/-
Bambrakelly	BOP1	1220/-
Queensberry	FBOP/FBOP1	1650/-
Venture	FBOP/FBOP1	1650/-
Inverness	FBOPF/FBOPF1	1500/-
Queensberry	FBOPF/FBOPF1	1500/-
Venture	OP/OPA	1380/-
Venture	OP1	1420/-
Torrington	PEK/PEK1	1850/-

NUWARA ELIYA

Mahagastotte	BOP	1380/-
Kenmare	BOPSP	980/-
Mahagastotte	BOPF/BOPFSP	1260/-
Kenmare	FBOP/FBOP1	1080/-
Mahagastotte	FBOPF/FBOPF1	1440/-
Court Lodge	OP/OPA	900/-
Court Lodge	PEK/PEK1	1280/-

UVA MEDIUM

Demodera 'S'	BOP	1650/-
*Halpewatta Uva	BOPSP	1600/-
Dickwella	BOPF/BOPFSP	1650/-
Aruna Passara	BOP1	2000/-
Sarnia Plaiderie	FBOP/FBOP1	1800/-
Dickwella	FBOP/FBOP1	1800/-
Shawlands	FBOP/FBOP1	1800/-
*Roseland Uva	FBOPF/FBOPF1	1550/-
Telbedde	FBOPF/FBOPF1	1550/-
Sarnia Plaiderie	FBOPF/FBOPF1	1550/-
Sarnia Plaiderie	OP/OPA	1440/-
Wewessa	OP1	1750/-
Dickwella	PEK/PEK1	2050/-

UVA HIGH

Bandaraeliya	BOP	1340/-
Aislaby	BOPSP	1650/-
Pitaratmalie	BOPF/BOPFSP	1280/-
Nayabedde	BOPF/BOPFSP	1280/-
Bandaraeliya	BOPF/BOPFSP	1280/-
Aislaby	BOP1	1700/-
Ranaya	BOP1	1700/-
Mount Uva	FBOP/FBOP1	1800/-
Needwood Super	FBOPF/FBOPF1	1600/-
Mount Uva	FBOPF/FBOPF1	1600/-
Aislaby	OP/OPA	1320/-
Ellathota Uva	OP1	1550/-
Aislaby	OP1	1550/-
*Battawatte	PEK/PEK1	1900/-
Aislaby	PEK/PEK1	1900/-

UDAPUSSELLAWA

Kirklees	BOP	1240/-
*Mooloya	BOP	1220/-
Luckyland	BOPSP	1200/-
Kirklees	BOPSP	1200/-
Luckyland	BOPF/BOPFSP	1300/-
*Mooloya	BOPF/BOPFSP	1280/-
Delmar	FBOP/FBOP1	1650/-
Delmar	FBOPF/FBOPF1	1550/-
Delmar	OP/OPA	1300/-
Delmar	OP1	1440/-
Maha Uva	PEK/PEK1	1900/-

OFF GRADES

*Laksakanda	BP	1260/-
Fairyland	BP	1220/-
Arbour Valley	BP	1220/-
*Laksakanda	BP	1200/-
*Chandrika CTC	PF	1140/-
Liyonta CTC	PF	1100/-
*Chandrika CTC	PF	860/-
Gunawardana	BM	1280/-
*Avisawella	BM	1120/-
Holyrood	FNGS/FNGS1	1280/-
Campion	FNGS/FNGS1	1260/-
Adisham	FNGS/FNGS1	1260/-
Eildon Hall	FNGS/FNGS1	1260/-
Wattegodde	FNGS/FNGS1	1260/-
Wanarajah	FNGS/FNGS1	1260/-
*Vellai Oya	FNGS/FNGS1	1240/-
Aldora	BOP1A	1600/-

LOW GROWN LEAFY GRADES

Gunawardana	BOP1	3000/-
Pothotuwa	BOP1	2700/-
*Makandura	BOP1	2650/-
New Vithanakanda	OP1	3600/-
Gunawardana	OP1	3600/-
Miriswatta	OP	1850/-
Miriswatta	OPA	1700/-
Liyonta	OPA	1700/-
Lions	OPA	1700/-
Liyonta	PEKOE	2700/-
Lumbini	PEKOE	2500/-
*Makandura	PEKOE	2250/-
Lions	PEKOE1	2400/-
Galatara	PEKOE1	2300/-
New Batuwangala	PEKOE1	2300/-
Golden Garden	PEKOE1	2300/-
*Andaradeniya S	PEKOE1	2250/-

LOW GROWN TIPPY GRADES

Green Lanka	BOP	2600/-
Himara	BOP	2400/-
Rumassala Hills	BOP	2400/-
*Nawagamuwahena	BOP	2350/-
*Andaradeniya S	BOP	2350/-
*Elaine Super	BOPSP	2550/-
Parakaduwa Super	BOPF	1950/-
Uruwala	BOPF	1850/-
*Sithaka	BOPF	1700/-
H P P Tea	BOPFSP	2400/-
*Sithaka	FBOP	2950/-
Kiruwanaganga	FBOP1	2100/-
*Hedigalla	FBOPF	2000/-
*Ganganee	FBOPF	1950/-
Danawala	FBOPF	1950/-
Rajjuruwatte Super	FBOPF1	2000/-

PREMIUM FLOWERY

Rasa	FBOPFSP	6250/-
Brombil	FBOPFEXSP	5000/-
*KDU Super	FBOPFEXSP1	4800/-

Dust

Wattegodde	DUST	1240/-
Mattakelle	DUST1	1750/-
Ceciliyan CTC	PD	1420/-

LOW GROWN

Dellawa	DUST	1160/-
*Green House	DUST	1080/-
*Chandrika Estate	DUST1	1020/-

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/-

COLOMBO AUCTION – WEEKLY GROSS SALE AVERAGES

SALE NO.46 OF 26TH NOVEMBER, 2025

	2025			2024	
	Weekly	Month to Date	Year to Date	Weekly	Year to Date
Uva High Grown	1,092.93	1,082.56	1,044.43	1020.09	1,099.97
Western High Grown	1,211.17	1,212.23	1,123.05	1,131.92	1,186.02
High Grown	1,174.97	1,173.35	1,097.83	1,102.11	1,158.31
Uva Medium	1,116.91	1,077.19	1,069.67	1,054.53	1,124.52
Western Medium	1,022.30	1,002.86	1,007.22	967.94	1,050.41
Medium Grown	1,049.13	1,022.07	1,026.75	992.63	1,074.92
Low Grown (Orthodox)	1,313.81	1,294.83	1,266.66	1,241.23	1,350.80
Combined L.G. (Orthodox + CTC)	1,296.02	1,269.64	1,250.06	1,219.53	1,328.10
Total	1,233.85	1,209.36	1,181.20	1,161.82	1,249.75

Private Sale Figures (20.11.2025 – 16.11.2025)

303,380.00

Cumulative

9,858,706.26

DETAILS OF TEAS AWAITING SALE

SALE NO: 48

SALE NO: 49

Sale of 15th /16th Dec. '25

Sale of 22nd /23rd Dec. '25

	<u>Lots</u>	<u>Qty. (Kgs)</u>	<u>Lots</u>	<u>Qty. (Kgs)</u>
Low Grown Leafy	2,094	808,831	2,216	857,656
Low Grown Semi Leafy	1,722	724,589	1,584	656,569
Low Grown Tippy	1,998	917,888	2,022	931,649
High & Medium	1,718	771,422	1,588	735,552
Off Grade/BOP1A	2,409	1,243,689	2,428	1,255,300
Dust	515	457,498	536	480,109
Premium Flowery	366	48,156	406	53,226
Ex-Estate	826	786,236	796	795,702
Total	<u>11,648</u>	<u>5,758,309</u>	<u>11,576</u>	<u>5,765,763</u>

FUTURE CATALOGUES CLOSURE

Sale No.01 of 06th (Tue.)/07th (Wed.) January, 2026

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **Monday 15th December, 2025 at 04.30 p.m.**

Sale No.02 of 12th (Mon.)/13th (Tue.) January, 2026

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **Monday 22nd December, 2025 at 04.30 p.m.**

SALE NO. 48

AUCTION OF 15th /16th 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. Asia Siyaka Commodities PLC	1. Forbes & Walker Tea Brokers (Pvt) Ltd	1. Eastern Brokers PLC
2. Lanka Commodity Brokers Ltd	2. Bartleet Produce Marketing (Pvt) Ltd	2. Asia Siyaka Commodities PLC
3. Mercantile Produce Brokers (Pvt) Ltd	3. Lanka Commodity Brokers Ltd	3. Forbes & Walker Tea Brokers (Pvt) Ltd
4. Forbes & Walker Tea Brokers (Pvt) Ltd	4. Ceylon Tea Brokers PLC	4. Lanka Commodity Brokers Ltd
5. Bartleet Produce Marketing (Pvt) Ltd	5. Eastern Brokers PLC	5. Ceylon Tea Brokers PLC
6. Eastern Brokers PLC	6. John Keells PLC	6. Bartleet Produce Marketing (Pvt) Ltd
7. Ceylon Tea Brokers PLC	7. Asia Siyaka Commodities PLC	7. John Keells PLC
8. John Keells PLC	8. Mercantile Produce Brokers (Pvt) Ltd	8. Mercantile Produce Brokers (Pvt) Ltd

Crop & Weather

For the period 26th November to 09th December 2025

Western/Nuwara Eliya Regions

The Western and Nuwara Eliya regions reported heavy rain throughout the week. The Department of Meteorology expects bright mornings and heavy evening showers in both regions in the week ahead.

Uva/Uda Pussellawa Regions

The Uva and Uda Pussellawa regions reported bright mornings and evening showers throughout the week. Misty conditions are expected in both regions in the week ahead according to the Department of Meteorology.

Low Grown

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

Crop Intake

All regions reported a decrease in the crop intake.

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

“Africa Tea Brokers Bulletin of Statistics”

OTHER MARKETS

LIMBE MARKET REPORT SALE 49 HELD ON 03/12/2025

There was fair demand following quality for the 2120 packages on offer at firm to dearer rates where sold.

BP1/PD- N/A.

PF1 – Single invoice sold 4USC up on last, balance were taken out.

D1 were up to 4USC dearer on last.

PF1SC – Single invoice fetched 6USC dearer, balance were taken out.

Secondaries held firm to 4USC dearer.

WEATHER/CROP FOR THE WEEK ENDING 30th NOVEMBER, 2025

Scattered rainfall were reported in Thyolo and Mulanje with Thyolo getting the highest up to 35mm total average rainfall.

Green leaf intakes still low but picking up gradually.

Tea Brokers Central Africa Ltd

BANGLADESH AUCTION

SALE NO. 30 OF MONDAY, 01st DECEMBER, 2025

CTC LEAF: 52,233 packages of tea on offer met with a very strong demand at much dearer rates.

BROKENs: Well made good liquoring Brokenes were a stronger market and prices appreciated by Tk.3/- to Tk.5/- and often more. Their smaller varieties attracted more competition and advanced further by Tk.7/- and more. Medium varieties were a strong market and were dearer by upto Tk.5/- over last. Plainer varieties received better enquiry and were dearer. BLF teas met with a dearer market but there were more withdrawals.

FANNINGS : Well made good liquoring Fannings were the strongest feature of the market and were often dearer by Tk.7/- and more. Medium and plainer types met with a strong demand and were dearer. BLF teas met with a dearer market but there were more withdrawals.

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 demand and sold around last levels. Plain/BLF had fair demand with some withdrawals. Both Blenders and Loose tea buyers lent strong support.

COMMENTS: A very strong demand prevailed throughout the sale with Blenders dominating the market which resulted in a substantial advancement in price. Loose tea buyers also competed but were quite selective.

Dusts sold well.

Quotations – This Week – (In Taka)

Brokenes	This Week	Last Week	Fannings	This Week	Last Week	Dust	This Week	Last Week
Best	275-285	265-273	Best	275-285	265-275	PD	265-375	245-315
Good	260-270	255-262	Good	260-270	257-262	RD	257-370	245-320
Medium	250-257	249-254	Medium	253-258	250-255	D	245-370	245-361
Plain	245-249	245-248	Plain	245-250	245-248	CD	250-350	250-290
BLF	234-253	235-240	BLF	238-251	235-240	BLF	242-252	235-246

COURTESY: NATIONAL BROKERS LTD



SOUTH INDIAN ROUNDUP

FOR THE WEEK ENDING – 06th DECEMBER, 2025

KOCHI

CTC LEAF

Demand : Fair Demand: All grades sold at irregular and lower.

ORTHODOX LEAF

Demand : Fair Demand.

Buying Pattern : High grown and other whole leaves sold at easier levels up to Rs 5 depending on quality with some withdrawals except for the Cleaner and blacker varieties were irregular around last levels. Primary brokenes were steady and Secondary brokenes and fannings fetched prices lower by Rs. 3 to 4

Market : CIS & Middle East Buyers operated.

DUST

Demand : Good demand.

Buying Pattern : Popular marks and good liquoring sorts sold at fully firm levels. Plainer sorts had better demand with an improvement on the prices by Rs.1 to 2.

Market : Major Packeteers and exporters were active, internal buyers were lending fair support.

COONOOR

CTC LEAF

Demand : Good.

Market : Market opened with a steady to easier levels by a Rs to Rs.2/- with some withdrawals on the plainer, browner and fibrous teas. However, as the sale progressed it witnessed a better enquiry to be sold at steady to firm levels and mostly on the certified gardens.

The overall sale percentage was 85% at an average of Rs.110/-

Buying Pattern: The Major Blenders and Packeteers were the main stay yet again whilst the export was lending fairly good support. Once again, the Internal buying was mostly on the price conscious.

ORTH LEAF

Demand : Fair.

Market : Market was generally easier by Rs.3/- to Rs.5/- and upto Rs.10/- across all grades and categories. The sale had witnessed fair withdrawals after a longtime without any bids.
The overall sale percentage was 72% at an average of Rs. 145.34.

Buying Pattern: Strong Export enquiry was forthcoming with Shah Brothers and Siewart & Dholakia being active and others rendering fair support.

CTC DUST

Demand : Good.

Market : The majority traded quantity was also at around last levels whilst the brighter liquoring teas have encounter better demand to be sold at fully firm to dearer levels. The price surge noticed even more on the Red and finer dusts.
The overall sale percentage was 86% at an average of Rs. 115.71.

Buying Pattern: Fairly strong export enquiry was witnessed with fair internal support in which Devagiri Tea produce was lending good support on the brighter liquoring teas. The Internal buying was rather cautious.

ORTH DUST

Demand : Good.

Market: Market had witnessed an irregular trend with popular primary dust grades were easier by Rs.10/- to Rs.20/-. The Secondaries were irregular whilst the Tertiaries were rather firm to dearer by Rs.2/-.
The overall sale percentage was 78% at an average of Rs. 117.72.

Buying Pattern: Fairly good export operation was witnessed whilst Anjaneya Enterprises (Devagiri Tea Produce co) was the only bright spot in Internal front absorbing major quantity of the high-grown primary dust grades.

COIMBATORE

CTC LEAF

Demand : Good general demand.

Market : Better medium and popular teas were lower with some withdrawals. Medium teas were firm to dearer. Plainer teas were irregular and lower by Re.1/- to Rs.2/- sometimes more.

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

ORTH LEAF

Demand : Less demand.

Market : Better medium well made brokens were firm with some withdrawals. Medium brokens were barely steady with some withdrawals. BOPF's were lower by Rs.3/- to Rs.4/-.

Buying Pattern : Exporters were active.

CTC DUST

Demand : Good general demand.

Market : Better medium and popular teas were fully firm to occasionally dearer. Medium teas were irregular and lower with few withdrawals. Plainer teas were lower by Re.1/- to Rs.2/-.

Buying Pattern : All sections were active.

ORTH DUST

Demand : Fair demand.

Market : Barely steady with some withdrawals.

Buying Pattern : Exporters were selective

December 9, 2025

-/ra.

TEA NEWS

LOCAL :-

Sri Lanka Tea Sale Average rises in November

In Sri Lankan Rupees								
	25-Nov	25-Oct	MOM Variance	24-Nov	YOY Variance	Todate 2025	Todate 2024	YOY Variance
High Grown	1,157.52	1,147.19	10.33	1,092.89	64.63	1,094.32	1,142.68	-48.36
Medium Grown	1,030.24	1,030.97	-0.73	990.25	39.99	1,023.94	1,066.85	-42.91
Low Grown	1,258.93	1,232.18	26.75	1,191.73	67.20	1,233.42	1,308.46	-75.04
Total	1,198.39	1,177.14	21.25	1,137.22	61.17	1,164.97	1,228.46	-63.49
In U.S. Dollars								
	25-Nov	25-Oct	MOM Variance	24-Nov	YOY Variance	Todate 2025	Todate 2024	YOY Variance
High Grown	3.78	3.77	0.01	3.74	0.04	3.65	3.77	-0.12
Medium Grown	3.36	3.39	-0.03	3.39	-0.03	3.41	3.52	-0.11
Low Grown	4.11	4.05	0.06	4.08	0.03	4.11	4.32	-0.21
Total	3.91	3.87	0.04	3.89	0.02	3.88	4.05	-0.17

shows an increase of Rs. 61.17 and USD 0.02 YOY.

Sri Lanka's tea sector recorded a welcome improvement in November 2025, with the National Tea Sale Average (NTSA) posting gains across most elevations compared to the previous month, even as overall performance for the year continues to lag behind 2024.

According to the Sri Lanka Tea Board, the NTSA for November reached Rs.1,198.39 (USD 3.91), marking an increase of Rs.21.25 and USD 0.04 over October. This recovery also extended year-on-year, with November's average improving by Rs.61.17 and USD 0.02 compared to November 2024.

The month's elevation-wise performance showed mixed results. High Grown teas recorded steady gains, rising by Rs.10.33 and USD 0.01 month-on-month, while also strengthening against last year with increases of Rs. 64.63 and USD 0.04. Low Grown teas, which continue to dominate national auction volumes, posted the strongest growth, improving by Rs.26.75 and USD 0.06 compared to October, and rising Rs. 67.20 and USD 0.03 against November 2024. However, Medium Grown teas dipped marginally during the month, recording a decline of Rs.0.73 and USD 0.03. Despite this, the category still posted a rupee-based year-on-year increase of Rs.39.99, although USD earnings edged lower by 0.03. While November's performance brought some positive sentiment to the market, the broader picture remains subdued. The cumulative NTSA for the January–November 2025 period stood at Rs.1,164.97 (USD 3.88), a decline of Rs.63.49 and USD 0.17 compared to the corresponding period last year. All three elevation High, Medium, and Low recorded negative variances in both rupee and dollar terms over the eleven-month period.

Industry analysts note that although the November recovery is significant, persistent cost pressures, fluctuating global demand, and competitive pricing from other origins continue to weigh on Sri Lanka's tea export earnings. Stakeholders say sustained improvement will be crucial to stabilise the sector as it heads into 2026.
