

TEA MARKET REPORT

SALE NO: 22

June 09 & 11, 2025



LANKA COMMODITY BROKERS LTD

LANKA COMMODITY BROKERS LTD

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COMMENTS

This week's Tea Auction, namely Sale #22 of 2025 was held on June 09th/11th, 2025 (Mon. /Wed). A total weight of 6.6 MKGS was on offer, which shows a slight decrease when compared to the previous week's quantity. The Low Grown Leafy, Semi Leafy, Tippy/Small Leaf & Premium Flowery catalogues totaled 2.6 MKGS, while the Main Sale High & Medium segment had 0.9 MKGS. The Ex Estate category had 0.9 MKGS.

Overall demand at the Ex-Estate sale held today continued to be again irregular with the exception of the Best Western BOP/BOPF appreciating owing to special airmail inquiry. At the lower end, clean teas were firm to Rs.50/- per kg dearer but the balance tended irregular and easier. Nuwara Eliya - BOPF's where quantity was maintained sold around last levels whilst there were no BOP's on offer. Uva/Udapussellawa select clean leaf teas appreciated by Rs.20-40/- per kg, whilst the others sold around last levels. CTC Teas - The better High & Medium PF1's sold around last levels whilst the balance were barely steady. Low Grown PF1's were firm with slightly improved demand at the lower end. There were hardly any BP1's on offer this week. The limited availability of the better teas on offer were sought after by Japan and the Continent whilst the balance were accounted for by shippers to Russia, and CIS with selective Middle Eastern buyers.

Low Grown catalogues continued to witness a firmer trend with the exception of high priced PEK's of last week, which was an easier feature. Small leaf teas were marginally easier this week whilst bright Tippy Teas were fully firm. There was wide spread demand from most markets.

This week's auction comprised of 12,378 lots with a total quantity of 6,665,536kgs.

The catalogue wise breakdown was as follows:-

In Lighter Vein

FOR THE DRUNKEN ONES WHO TAKE A TAXI HOME.....



	<u>Lots</u>	<u>Qty. (Kgs)</u>	
			<i>Three men were drunk and they stopped a taxi....</i>
Low Grown Leafy	2,354	970,414	<i>The taxi driver figured that they were not in their minds.....so,</i>
Low Grown Semi Leafy	1,589	700,371	<i>he just switched on the engine and switched it off and told them :</i>
Low Grown Tippy	1,945	945,165	<i>"we have arrived"..... The first man gave him money....</i>
High & Medium	2,079	989,951	<i>The second one thanked him.....but the third one....he slapped the taxi driver....</i>
Off Grade/BOP1A	2,392	1,294,087	<i>The taxi driver was stunned because he was hoping that none of them must have realized that the car didn't move an inch.....so,</i>
Dust	750	747,178	<i>he asked the third man: "what was that for?"</i>
Premium Flowery	349	56,923	<i>the third man replied : "control your speed from next time onwards.....</i>
Ex-Estate	<u>920</u>	<u>961,447</u>	<i>you almost killed us.....</i>
Total	<u>12,378</u>	<u>6,665,536</u>	

LOW GROWN TEAS

LEAFY/SEMI LEAFY

BOP1 : Select best invoices were easier, whilst the balance too met with lower demand.

OP1 : In general were lower.

OP : In general were lower.

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

PEK/PEK1 : PEK's in general were firm. Well-made PEK1's were maintained, whilst the balance were irregularly dearer. Teas at the lower end 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>
BOP1	1350-3000	1350-3000	1000-1150	1000-1150	850-1050	850-1050
OP1	1500-3250	1500-3250	1100-1250	1100-1300	800 -1000	850-1000
OP	1100-1550	1100-1550	1000-1050	1000-1050	900-950	900-950
OPA	1100-1650	1100-1650	1000-1050	1000-1050	900-950	900-950
PEK/PEK1	1400-2400	1400-2550	1100-1250	1100-1200	950-1050	950-1050

TIPPY/SMALL LEAF

BOP/BOPSP : A selection of select best BOP's were firm to dearer, whilst the balance sold around last levels.

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

FBOP/FBOP1 : Select best FBOP's were firm, whilst the best and below best sold around last levels. Teas at the lower end were lower following quality. FBOP1's in general were firm.

FBOPF/FBOPF1 : Very Tippy Teas met with good demand and were dearer, whilst the Best and Below Best too appreciated. However, teas at the lower end together with the leafier varieties were firm on last. Well-made FF1's were firm, whilst the cleaner Below Best and cleaner teas at the lower end were firm to dearer. Balance sold around last levels.

FBOPFSP : Select Best Tippy Teas met with good demand, whilst the best and Below Best maintained.

FFEXSP/SP1 : Select Best were firm, whilst the best and Below Best maintained on last levels, where as lower end teas were firm to easier following quality.

Quotations (Rs./Kg)	Best		Below Best		Others	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
BOP/BOPSP	1850-2150	1850-2300	1650-1800	1650-1800	1500-1600	1500-1600
BOPF /BOPFSP	1650-2000	1650-2300	1450-1600	1450-1550	1250-1400	1250-1350
FBOP/FBOP1	1950-2450	1960-2600	1750-1900	1750-1900	1600-1700	1600-1700
FBOPF/FBOPF1	1500-1950	1500-1750	1450-1550	1480-1550	1380-1420	1380-1420
FBOPFSP/EXSP	4200-4950	4100-4800	2800-3850	2800-3800	2350-2800	2350-2750

MEDIUM GROWN LEAFY/SEMI LEAFY TEAS

FBOP : Except for select best invoices, balance tended irregularly lower. Teas at the lower end too declined towards the close.

FBOPF/FBOPF1 : Best teas on offer declined Rs.20/- per kg and more. Below best poorer sorts declined fairly sharply.

PEK/PEK1 : Except for the very shotty neat invoices, others tended easier as the sale progressed.

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	1350-1850	1400-2200	1200-1350	1250-1500	1100-1250	1250-1400
FBOPF/FBOPF1	1380-1600	1400-1700	1250-1380	1350-1450	1000 -1250	1050-1280
PEK/PEK1	1350-1650	1400-1700	1100-1350	1120-1380	1000-1100	1100-1220

HIGH GROWNS TEAS

BOP : Western's – A few select teas appreciated by Rs.50/- per kg and more following special inquiry, whilst the others were irregular and often easier. At the lower end of the market, a few select clean leaf coloury sorts were up to Rs.50/- per kg dearer, whilst the others continued to sell around last week's levels. Nuwara Eliya's – N/A. Uva/Uda Pussellawa's – Select clean leaf teas were up to Rs.50/- per kg dearer, whilst the others were barely steady.

BOPF : A selection of Western's gained by Rs.20-40/- per kg and more following special inquiry, whilst the others were irregular following quality. At the lower end, clean leaf teas continued to sell around last week's levels, whilst the others were irregular and tended easier. Nuwara Eliya's, where quality was maintained, sold around last week's levels. Uva/Uda Pussellawa's – A few select clean leaf invoices appreciated by Rs.20-40/- per kg, whilst the others sold around last week's levels.

Quotations (Rs./Kg)	BOP		BOPF	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Best Westerns	1120 - 1260	1160-1360	1200 - 1400	1180-1360
Below Best Westerns	1000 - 1100	1020-1120	1020 - 1180	1040-1160
Plainer Westerns	860 - 980	840-1000	810 - 1000	810-1020
Nuwara Eliyas	N/A	N/A	N/A	N/A
Brighter UdaPussellawas	880 - 920	N/A	880 - 920	850-880
Other Uda Pussellawas	850 - 870	840-880	850 - 860	810-840
Best Uva's	1120 - 1220	1060-1160	1040 - 1260	960
Other Uva's	870 - 900	900	850 - 960	830-940

MEDIUM GROWN TEAS

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

BOPF : Better teas were mostly firm, whilst the other secondary types were firm and Rs.20-40/- per kg easier.

Quotations (Rs./Kg)	BOP		BOPF	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Best Westerns	800 - 1700	830-1750	760-1040	760-1060

CTC TEAS

HIGH GROWN:-

BP1 - Hardly any offerings.

PF1 - In the higher price bracket – Select invoices were up to Rs.50/- per kg dearer, whilst the others were barely steady.

MEDIUM GROWN:-

BP1 - Hardly any offerings.

PF1 - Better teas were firm, whilst the others were irregular following quality.

LOW GROWN:-

BP1 - Gained by Rs.50/- per kg and more.

PF1 - Firm with slightly better activity at the lower end.

Quotations (Rs./Kg)	BP1		PF1	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
High	N/A	1200	860-1140	810-1080
Medium	700-1220	700-1220	750-1080	740-1100
Low	820-1260	700-1160	720-1480	660-1550

OFF GRADES

FGS/FGS1 : Select best FNGS/FNGS1 firm to easier by Rs.20-40/- per kg. . Others lost Rs.20-40/-. Low Grown select best FNGS/FNGS1 declined Rs.10-20/- per kg. Below best and poorer teas however appreciated Rs.20/- per kg and select best BM's were firm. Best and Below best types lost Rs.10-20/- easier.

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

QUOTATIONS (Rs./kg)	HIGH		MEDIUM		LOW	
	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>	<u>This Week</u>	<u>Last Week</u>
Good Fannings (Orthodox)	800-880	800-900	770-820	770-820	800-850	800-880
Good Fannings (CTC)	780-820	780-820	750-820	750-820	770-850	770-850
Other Fannings (Orthodox)	725-750	725-750	725-750	725-750	725-750	725-750
Other Fannings (CTC)	N/A	N/A	N/A	N/A	N/A	N/A
Good BM's	870-890	870-900	860-880	860-890	850-930	860-950
Other BM's	840-870	840-870	840-870	840-870	830-870	840-870
Best BOP1As	900-920	900-930	900-930	900-930	1100-1400	1100-1400
Other BOP1As	870-890	880-910	870-890	880-920	870-910	880-930

DUST

DUST/DUST1: High Grown liquoring Dust/Dust.1's gained Rs.30-50/- per kg whilst, their secondaries and poorer types were firm on last levels. Mid Grown teas sold firm on last, whilst the Low Grown were fully firm to dearer.

PD : High Grown maintained last levels, whilst the Low Grown were fully firm to dearer Rs.40-60/- dearer.

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)	830 -1700	820 - 1700	780 - 1160	750-1240	800-1380	820-1380
Good Primary PD (CTC)	800 - 1120	780-1060	760 - 1140	740-1160	780 - 1380	800-1420
Secondary Dust	770 - 940	760 - 960	750 - 900	730-820	820 - 920	800 -1100

WESTERN MEDIUM

*Harangalla	BOP	1700/-
Doombagastalawa	BOPSP	1460/-
*Hatale	BOPSP	1440/-
*Ancoombra	BOPSP	1420/-
*Vellai Oya	BOPF	1040/-
*Uplands	BOPFSP	1360/-
Harangalla	BOP1	1750/-
Craighead	FBOP/FBOP1	1850/-
Harangalla	FBOP/FBOP1	1850/-
*Hatale	FBOP/FBOP1	1800/-
*Ancoombra	FBOP/FBOP1	1800/-
*Hatale	FBOPF/FBOPF1	1600/-
Craighead	FBOPF/FBOPF1	1600/-
*Harangalla	FBOPF/FBOPF1	1550/-
*Ancoombra	FBOPF/FBOPF1	1550/-
Dartry Valley	FBOPF/FBOPF1	1550/-
*Hatale	OP/OPA	1200/-
Craighead	OP1	1800/-
Craighead	PEK/PEK1	1650/-
Harangalla	PEK/PEK1	1650/-

WESTERN HIGH

Robgill	BOP	1260/-
Queensberry	BOPSP	1460/-
Robgill	BOPF/BOPFSP	1400/-
Inverness	BOP1	1800/-
Inverness	FBOP/FBOP1	1550/-
Bogahawatte	FBOP/FBOP1	1550/-
Bambrakelly	FBOP/FBOP1	1550/-
Queensberry	FBOPF/FBOPF1	1400/-
Venture	OP/OPA	1080/-
St.Andrews	OP1	1700/-
Inverness	PEK/PEK1	1500/-

NUWARA ELIYA

Kenmare	BOPSP	800/-
Court Lodge	BOPF/BOPFSP	760/-
Kenmare	FBOP/FBOP1	1120/-
Kenmare	FBOPF/FBOPF1	1340/-
Lovers Leap	OP/OPA	1000/-
Lovers Leap	PEK/PEK1	1000/-

CTC TEAS**HIGH GROWN**

Dunsinane CTC	PF1	1140/-
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MEDIUM GROWN

New Peacock CTC	BP1	1220/-
*New Peacock CTC	PF1	1080/-
Strathdon CTC	PF1	1080/-

LOW GROWN

Ceciliyan CTC	BP1	1260/-
Kalubowitiyana CTC	PF1	1480/-

UVA MEDIUM

Demodera 'S'	BOP	1440/-
Hindagala	BOPSP	1400/-
Dickwella	BOPF/BOPFSP	1550/-
Dickwella	BOP1	1600/-
*Roseland Uva	BOP1	1550/-
*Roseland Uva	FBOP1/FBOP1	1750/-
Dickwella	FBOPF/FBOPF1	1500/-
*Roseland Uva	FBOPF/FBOPF1	1460/-
Glen Alpin	OP/OPA	1140/-
Dickwella	OP1	1600/-
Adawatte	OP1	1600/-
Sarnia Plaiderie	PEK/PEK1	1600/-
Dickwella	PEK/PEK1	1600/-

UVA HIGH

Nayabedde	BOP	1220/-
Gonamotawa	BOPSP	1380/-
Nayabedde	BOPF/BOPFSP	1040/-
Gonamotawa	BOP1	1800/-
Gonamotawa	FBOP/FBOP1	1700/-
Gonamotawa	FBOPF/FBOPF1	1480/-
Uva Highlands	OP/OPA	1240/-
Ellathota Uva	OP1	1500/-
Gonamotawa	PEK/PEK1	1500/-
Ellathota Uva	PEK/PEK1	1500/-
Uva Highlands	PEK/PEK1	1500/-

UDAPUSSELLAWA

Kirklees	BOP	960/-
Gampaha	BOPSP	1180/-
Luckyland	BOPF/BOPFSP	920/-
*Mooloya	BOPF/BOPFSP	900/-
Delmar	FBOP/FBOP1	1440/-
*Delmar	FBOPF/FBOPF1	1380/-
*Delmar	OP/OPA	1040/-
High Forest	OP1	1100/-
*Delmar	OP1	1080/-
Gampaha	PEK/PEK1	1340/-

OFF GRADES

Dampahala	BP	1180/-
Hingalgoda CTC	PF	1180/-
*Avisawella	BM	1000/-
Chandrika Estate	BM	1000/-
*Ganganee	BM	980/-
*Greenwin	BM	980/-
*Avisawella	BM	980/-
*Avisawella	BM	960/-
Eildon Hall	FNGS/FNGS1	1080/-
Aldora	BOP1A	1400/-
*Chandika Estate	BOP1A	1380/-
Chandrika Estate	BOP1A	1380/-
*Chandrika Estate	BOP1A	1360/-

LOW GROWN LEAFY GRADES

Pothotuwa	BOP1	3000/-
Dampahala	BOP1	3000/-
Pothotuwa	OP1	3250/-
Parakaduwa Super	OP	1550/-
Lickra	OP	1550/-
Lucky Dais	OPA	1650/-
Lumbini	PEKOE	2400/-
Galatara	PEKOE1	2300/-
*Andaradeniya S	PEKOE1	2250/-
*New Laksakanda	PEKOE1	2250/-

LOW GROWN TIPPY GRADES

Lions	BOP	2150/-
Wathurawila	BOP	2150/-
Kamarangapitiya	BOPSP	2250/-
*New Laksakanda	BOPSP	1800/-
*Athukorala GS	BOPSP	1750/-
Kings Bru	BOPF	1700/-
*Sithaka	BOPF	1650/-
*Greenwin Super	BOPFSP	2000/-
*Andaradeniya S	BOPFSP	1550/-
Kiruwana ganga	FBOP	2450/-
*Sithaka	FBOP	2400/-
Dullie Ella	FBOP1	1950/-
*Ganganee	FBOP1	1900/-
*Elaine Super	FBOP1	1900/-
Danawala	FBOPF	2200/-
*Ganganee	FBOPF	1900/-
Lumbini	FBOPF1	1950/-
*Makandura	FBOPF1	1750/-

PREMIUM FLOWERY

*Greenwin Super	FBOPFSP	4950/-
Nilgiri	FBOPFEXSP	4950/-
Tea Bank	FBOPFEXSP1	5350/-

Dust

*Wattahena	DUST	940/-
Somerset	DUST	940/-
*Chandrika Estate	DUST	960/-
New Deniyaya	DUST	960/-
Holyrood	DUST	960/-
Wattegodde	DUST	960/-
*Andaradeniya Hills	DUST	900/-
Strathdon CTC	DUST	900/-
Great Western	DUST1	1700/-
Ceciliyan CTC	PD	1380/-

Western Medium

*Vellai Oya	DUST1	1160/-
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NATIONAL ELEVATIONAL AVERAGES – MAY, 2025

Elevation	MONTH		TO-DATE	
	QUANTITY -KG-	AVERAGE -RS./KGS-	QUANTITY -KG-	AVERAGE -RS/KGS-
ORTHODOX				
UVA-HIGH	1,711,169	1,024.56	6,396,871	1,055.58
WESTERN-HIGH	2,877,763	1,042.90	13,250,003	1,137.47
UVA-MEDIUM	1,439,174	1,077.86	5,624,149	1,091.26
WESTERN-MEDIUM	2,129,531	1,043.12	8,928,806	1,061.91
LOW	12,029,271	1,272.94	58,053,027	1,273.27
TOTAL	20,186,908	1,180.94	92,252,855	1,207.12
C T C				
UVA -HIGH	67,915	1,140.01	358,474	1,136.87
WESTERN- HIGH	343,746	996.11	1,551,218	1,073.60
WESTERN - MEDIUM	861,103	921.32	3,874,549	952.92
LOW	1,088,062	1,007.52	5,003,867	981.77
TOTAL	2,360,826	978.23	10,788,108	989.77
COMBINED (Orthodox / CTC)				
UVA-HIGH	1,779,084	1,028.97	6,755,345	1,059.89
WESTERN-HIGH	3,221,509	1,037.91	14,801,221	1,130.78
UVA-MEDIUM	1,439,174	1,077.86	5,624,149	1,091.26
WESTERN-MEDIUM	2,990,634	1,008.05	12,803,355	1,028.93
LOW	13,117,333	1,250.92	63,056,894	1,250.13
TOTAL	22,547,734	1,159.71	103,040,963	1,184.36

COLOMBO AUCTION – WEEKLY GROSS SALE AVERAGES

SALE NO.21 OF 04TH JUNE, 2025

	2025			2024	
	Weekly	Month to Date	Year to Date	Weekly	Year to Date
Uva High Grown	992.45	996.02	1,046.42	1,098.43	1,118.00
Western High Grown	991.07	1,006.70	1,112.12	1,173.73	1,201.05
High Grown	991.51	1,003.38	1,091.63	1,145.15	1,175.35
Uva Medium	1,040.17	1,041.43	1,087.37	1,128.19	1,156.88
Western Medium	979.29	985.88	1,026.08	1,025.79	1,089.79
Medium Grown	1,000.01	1,004.51	1,045.54	1,066.05	1,111.94
Low Grown (Orthodox)	1,231.43	1,231.43	1,267.96	1,387.67	1,404.38
Combined L.G. (Orthodox + CTC)	1,219.00	1,217.05	1,254.45	1,363.94	1,379.02
Total	1,126.43	1,126.97	1,185.15	1,267.34	1,290.96

Private Sale Figures (02.06.2025 –07.06.2025) - 199,815.50 kgs

Cumulative - 4,769,018.26 kgs

DETAILS OF TEAS AWAITING SALE

SALE NO: 23

SALE NO: 24

Sale of 17th /18th June '25

Sale of 24th /25th June '25

	<u>Lots</u>	<u>Qty. (Kgs)</u>	<u>Lots</u>	<u>Qty. (Kgs)</u>
Low Grown Leafy	2,163	907,969	2,053	831,055
Low Grown Semi Leafy	1,713	773,403	1,588	697,128
Low Grown Tippy	2,225	1,080,468	2,021	962,742
High & Medium	1,870	907,059	2,337	1,122,963
Off Grade/BOP1A	2,483	1,347,882	2,449	1,376,587
Dust	650	621,221	655	620,431
Premium Flowery	440	69,184	441	67,577
Ex-Estate	<u>875</u>	<u>912,773</u>	<u>828</u>	<u>858,896</u>
Total	<u>12,419</u>	<u>6,619,959</u>	<u>12,372</u>	<u>6,537,379</u>

FUTURE CATALOGUES CLOSURE

Sale No.25 of 01st/02nd July, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **13th June, 2025 at 04.30 p.m.**

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

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

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

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

SALE NO. 23

AUCTION OF 17th /18th JUNE, 2025

BROKERS' SELLING ORDER

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

Crop & Weather

For the period 04th to 09th June, 2025

Western/Nuwara Eliya Regions:-

The Western and Nuwara Eliya regions reported dry weather throughout the week. According to the Department of Meteorology, rain is expected in both regions in the week ahead.

Uva/ Udapussellawa Regions:-

Bright weather and windy conditions were reported in both regions throughout the week. Heavy showers together with strong winds are expected in Uva and Uda Pussellawa regions in the week ahead according to the Department of Meteorology.

Low Grown:-

Bright weather was reported throughout the week in the Low Grown Region. The Department of Meteorology expects rain in the Low Grown Region in the week ahead.

Crop Intake:-

All regions reported a significant decrease in the crop intake.

WORLD CROP STATISTICS (MKGS)

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

Country	Month	2023	2024	Difference +/-	To-date 2023	To-date 2024	Difference +/-
BANGLADESH	Dec.	7.79	6.37	-1.42	102.95	93.04	-9.91

OTHER MARKETS

MALAWI MARKET REPORT

LIMBE MARKET REPORT SALE 24 HELD ON 11/06/2025

There was improved but selective demand for the 4760 packages on offer at generally firm rates.

BP1 – Met selective interest at firm rates where sold.

PF1 – Selected invoices sold 1 to 3USC easier on last, balance were taken out with no bids.

PD - Were all neglected.

D1 – Were firm on last where sold.

PF1SC – Held firm.

Secondaries were firm on last to 6USC dearer where sold.

WEATHER/CROP FOR THE WEEK ENDING 08TH JUNE, 2025

It was warm, partly cloudy during the day with cold nights. No rainfall was reported this week.

Low green leaf intakes reported from all Estates.



SOUTH INDIAN ROUNDUP

FOR THE WEEK ENDING – 07th JUNE, 2025

KOCHI

CTC LEAF

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

ORTHODOX LEAF

Demand : Good demand.

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

Market : CIS & Middle East Buyers operated.

DUST

Demand : Fair demand.

Buying Pattern : Popular marks and better mediums sold irregularly around last levels. Medium and plainer sorts sold at an easier note, down by Rs.2 to 3 with a fair amount of withdrawals noticed especially the plainer SRD and SFD.

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

COONOR

CTC LEAF

Demand : Fairly Good.

Market : Opened irregularly easier by Rs. 2/- to Rs.3/- across grades and categories while witnessing some withdrawals on the better mediums and the trend continued till the end of the sale. The market had witnessed the major quantity of the larger broken have held on to last levels. The browner flakier and faulty liquoring tea continued to suffer out lots even though the brokers quotations were reasonably lower.

The overall sale percentage was 80.16% at an average of Rs.99.91

Buying Pattern: The major blenders and regional packeteers were continued to be the mainstay whilst the exporters were operating on the larger broken. The internal buyers were seen absorbing the major quantity of the brighter liquoring teas.

ORTH LEAF

Demand : Good.

Market : An irregular market and mostly was an easier trend on the broken by Rs. 2/- to Rs.5/- and sometimes more following quality. However the whole leaves were trading at rather barely steady levels. The sale had witnessed some withdrawals as well.

The overall sale percentage was 85.46% at an average of Rs.147.59

Buying Pattern: Fairly strong export enquiry was forthcoming with Shah brothers was active whilst the internal were also seen lending equal support after a long time.

CTC DUST

Demand : Only fair.

Market : The easier trend continued this week too as prices were dropping by Rs. 2/- to Rs.5/- and more sometimes following quality. The market had responded yet again to fairly blacker, cleaner and non-faulty teas. The browner and flakier teas with faulty liquors have witnessed fair discount or rather suffered withdrawals.

The overall sale percentage was 59.15% at an average of Rs.106.52

Buying Pattern: Fair export enquiry was witnessed with equal support from the internal buyers. M/s Anjaneya Enterprises (Devagiri Tea Produce Co) was seen absorbing the maximum quantity of the brighter and high priced teas.

ORTH DUST

Demand : Good.

Market: Generally a steady market while witnessing a steady to firm levels on the primary and popular bolder dust grades. However the secondaries were down by Rs. 3/- to Rs.5/- and more sometimes. The terriateries were irregular and mostly trading at last levels.

The overall sale percentage was 89.89% at an average of Rs. 132.36

Buying Pattern: Strong export enquiry was forthcoming with Madhu jayanthi , IPL, and Young Tea Pvt Ltd., were active. On the internal front, Anjaneya Enterprises was yet again absorbing the primary dust grades.

COIMBATORE**CTC LEAF**

Demand : Fair demand.

Market : Better medium and popular teas were lower with heavy withdrawals. Medium teas were lower by Rs.2/-to Rs.3/- sometimes more. Plainer teas were irregular and lower by Rs.2/- with heavy withdrawals.

Buying Pattern : Blenders and packeteers were active. Exporters and internal were selective.

ORTH LEAF

Demand : Fair demand.

Market : Whole leaf steady. Well-made brokens were lower by Rs.2/-. Secondary brokens were lower by Rs.4/- to Rs.5/- with withdrawals. Secondary OF lower by Rs.1/- to Rs.2/-.

Buying Pattern : Exporters were active.

CTC DUST

Demand : Good general demand.

Market : Better medium / popular sorts were barely steady to firm with some withdrawals. Medium teas were irregular and lower by Rs.2/- sometimes more with some withdrawals. Plainer teas were irregular and lower by Rs.2/- to Rs.3/- with few withdrawals. As sale progressed it was fully firm.

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

ORTH DUST

Demand : Good demand.

Market : Dearer by Rs.2/- to Rs.3/-.

Buying Pattern : Exporters were active.

MOMBASA TEA AUCTION MARKET REPORT

Sale No.23 of 09TH & 10TH JUNE, 2025

Selective demand for the 195,179 packages (13,229,406.00 kilos) on offer with 45.43% remaining unsold.

MARKETS:

Egyptian Packers lent steady support while **Pakistan Packers, Yemen** and **other Middle Eastern Countries** reduced activity. **Kazakhstan** and **other CIS states** were more forceful in quality types while **Bazaar** and **Afghanistan** showed less interest. There was maintained but selective absorption from **UK** while **Russia** were less active. **Sudan** and **South Sudan** were absent.

OFFERINGS:

Leaf Grades - 101,540 packages (6.68m/kgs) – 55.54% unsold.
 Dust Grades - 72,740 packages (5.44m/kgs) – 38.19% unsold.
 Secondary Grades - 20,899 packages (1.11m/kgs) – 21.47% unsold.

LEAF GRADES (M2 & M3)

BP1:

Best: Some teas gained by up to USC90 with select invoices substantially appreciating by USC116, USC118 and USC154; a few lines however, shed up to USC8.

Brighter: Irregular varying between dearer by up to USC17 to easier by up to USC6.

Mediums: KTDA mediums lost up to USC10 with plantation mediums discounted by up to USC31.

Lower Medium: Shed up to USC11.

Plainer: Eased by up to USC17.

PF1:

Best: Irregular and varied between steady to mostly easier by up to USC10 but a few lines were up to USC5 above last levels.

Brighter: Fully firm to USC5 dearer.

Mediums: KTDA mediums were firm to USC2 dearer to easier by up to USC12 while plantation mediums saw irregular interest gaining USC13 to easier by up to USC4.

Lower Medium: Irregular enquiry and varied between USC7 dearer to easier by up to USC13.

Plainer: Shed up to USC9 but select lines were up to USC5 above previous levels.

DUST GRADES (M1)**PDUST:**

- Best:** Were up to USC16 above previous levels to easier by up to USC8.
- Brighter:** Saw irregular enquiry and mostly shed up to USC15.
- Mediums:** KTDA mediums were steady to dearer but up to USC10 to easier by up to USC7. Plantation mediums were irregular and ranged between firm to USC6 above previous levels to easier by up to USC4.
- Lower Medium:** Irregular and varied between steady to USC8 dearer to USC6 below previous levels.
- Plainer:** Firm to USC4 dearer to mostly easier by up to USC6.

DUST1:

- Best:** Were easier by up to USC18 with select invoices up to USC7 above last levels.
- Brighter:** Irregular interest at USC9 dearer to easier by up to a similar margin.
- Mediums:** KTDA mediums met irregular support and ranged between USC8 easier to dearer by up to USC14. Plantation mediums varied between USC7 above previous rates to easier by up to USC8.
- Lower Medium:** Irregular varying between USC4 dearer to USC10 below last rates.
- Plainer:** Easier by up to USC8 but select lines gained up to USC4.

SECONDARY GRADES(S1)

In the Secondary Catalogues, best **BPs gained** with others easier while **PFs** were saw irregular interest. Clean well sorted coloury **Fannings** held value with **similar DUSTs** firm to about USC5 dearer. **Other Fannings** were steady with **DUSTs** firm. **BMFs** were readily absorbed at last levels.

June 11, 2025

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International Tea News

Tea industry's top global producer calls for caution on over-production

By Sunimalee Dias

View(s): 1232

Browns Group has firmly established itself in the global tea industry, emerging as the largest producer of tea worldwide. Through bold strategies, international expansion and forward-thinking management, the group continues to thrive in a traditionally volatile sector.

Today, Browns Plantations produces approximately 100 million kg of tea annually with around 17 million kg in Sri Lanka and 85 million kg overseas across Kenya, Tanzania, Rwanda, and China, LOLC Holdings PLC Group Managing Director/CEO Kapila Jayawardena, told The Sunday Times Business during an interview at the LOLC Head office in Rajagiriya.



Mr. Kapila Jayawardena.

Brown's foray into the tea sector began in 2008 with the acquisition of 50 per cent of Pussellawa and Maturata Plantations from Free Lanka Capital Holdings, later listed in 2012. The remaining 50 per cent was acquired in 2015. The following year, in 2016, Browns took over Agalawatta Plantations from Mackwoods Plantations, but in 2017 both Pussellawa and Agalawatte plantations were divested. "But we retain our interest in the plantations sector through Maturata Plantations, even though it was then a loss-making entity," Mr. Jayawardena said. A significant shift came with the introduction of the revenue-share model, which transformed the traditional estate worker dynamic. "Under this model, villagers, workers and ex-workers are allocated plots annually and are encouraged to maintain them and sell their leaf to the company at agreed prices," he said adding that today this model has boosted both company performance and worker income, with some workers earning around Rs.200,000 a month.

"We were able to convert the Maha Uva estate from a Rs.28 million loss to a Rs.25 million profit in just one year," the GMD/CEO explained. This led to Maturata Plantations becoming one of the most profitable companies in the plantation industry. Mr. Jayawardena explained that by pegging the cost to the income they were able to resurrect the company – a move that breathed new life into the operations. This success propelled Browns Plantations back into expansion mode. In 2021 the company acquired Hapugastenne and Udapussellawa Plantations from Finlays. The major breakthrough for

Browns Plantations came in 2023 when Finlays decided to exit Kenya. Browns then presented a comprehensive growth strategy that aligned with Finlays expectations for responsible succession. Browns was selected to take over operations – not simply as a buyer, but as a strong and capable partner aligned with Finlays legacy. A similar process followed with Lipton's exit from Rwanda, Tanzania and Kenya with Browns emerging as the chosen successor. The acquisition of Finlays and Lipton contributed to the addition of 85 million kg of made tea to the company's annual production, making Browns Plantations the largest global producer of tea.

While scaling up globally, Browns Plantations also focused on deepening their presence in Sri Lanka, Mr. Jayawardena said noting that "Ceylon Tea remains the pinnacle of global tea." This led to the company acquiring the Tea Smallholders Factories PLC from John Keells, and Pussellawa Plantations back from Damro. He said the company has set a measurable target: to reach 150 million kg of total production globally within the next few years with about 200-250 million kg seen as the sustainable upper limit for the Sri Lanka tea industry.

Mr. Jayawardena stated that Browns is prioritizing sustainability and long-term value. He noted that the largest tea consuming countries today are those that do not demand ESG standards. Meanwhile, the markets that do require strict ESG compliance are often unwilling to pay a premium for meeting those standards. While global demand for tea remains steady, the real challenges for Sri Lanka's tea industry lie within. "The industry is not threatened by falling global consumption," Mr. Jayawardena clarified. "The concern is more local – land used for tea is shrinking gradually due to population pressures and competing land use." In fact, he referred to the glyphosate and fertilizer bans imposed a few years ago – policies initially feared to be harmful. "In hindsight, the bans were good for the industry. Tea prices surged due to reduced supply, improving profitability" explained Mr. Jayawardena.

Oversupply of tea would inevitably depress prices and with Ceylon Tea continuing to hold its flavour and value with global consumers, it is not easily replaceable.

In this respect, it was pointed out that to retain value, the company must align production with market demand. "Sri Lanka should ideally limit tea production to 200 million kg per annum," Mr. Jayawardena said. "Sri Lanka's drop in production from the peak 340 million kg in 2013 shows improved sale prices which remain strong", he further added.

"It's okay to lose some market share if your topline and bottom line are strong," he said. In 2013, Sri Lanka produced 340 million kg of tea but earned less export revenue than it does today, despite current production being only 225 million kg.

Kenya, on the other hand, produces more than twice the volume of Sri Lanka, yet generates lower export income. This highlights the risk of overproduction — a path Sri Lanka has wisely avoided. As a significant player in the Kenyan tea industry, Browns is engaging with relevant stakeholders to address this issue and explore how the Kenyan market can adopt a more value-driven approach, following Sri Lanka's example to enhance export earnings rather than focusing solely on volume.

In Africa, Browns Plantations is evaluating real estate development by converting underutilized plantation properties. Land must be allowed to be used for its maximum benefit, and they need to look at what's the best use of the land, Mr. Jayawardena said adding that underutilized land is not good for any country. At present no structural changes have been made to the recently acquired Lipton and Finlays plantations. However, the company believes in evaluating land use holistically – a balance between agriculture and responsible, economically viable diversification, where appropriate. Browns Plantations will continue to expand across Asia, Africa and South America in the tea industry, Mr. Jayawardena said while consolidating and strengthening operations within Sri Lanka.

Courtesy "Business page of Sunday Times"