TEA MARKET REPORT

SALE NO: 31

August 12 & 13, 2025

LANKA COMMODITY BROKERS LTD

LANKA COMMODITY BROKERS LTD

P.O.Box.2077, Colombo. No: 70 & 72, Maligakanda Road, Colombo 10, Sri Lanka.

Tel:94 11 5222300 Fax: 94 11 5377090

E-mail: lcbl@lcbl-sl.com Website: www.lcbl-sl.com

COMMENTS

This week's Tea Auction, namely Sale #31 was held on August 12th (Tue.)/13th (Wed.), 2025. A total weight of 5.8 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 2.5 MKGS, while the Main Sale High & Medium segment had 0.7 MKGS. The Ex Estate category had 0.8 MKGS

This week's Ex-Estate sale was held at the Chamber of Commerce Auditorium. There was improved demand all-round with a large participation of buyers. A selection of Best Western BOP's/BOPF's were firm to Rs.20-40/- per kg dearer whilst others held firm. In the below best category, a range of invoices gained Rs.50/- per kg for BOP's and Rs.50-100/- per kg for BOPF's respectively, whilst others tended irregular. Lower end teas were fully firm to Rs.20/- per kg dearer. Nuwara Eliya's tended irregular this week. Seasonal BOP's/BOPF's sold between Rs.2500-3600/- per kg and Rs.2200-2550/- per kg respectively. Udapussellawa's were firm to dearer. CTC Teas – High & Medium PF1's sold at firm to dearer levels along with Low Grown varieties. There were hardly any BP1's on offer this week. There was good general demand from shippers to Japan, the Continent and South Africa for the better flavoring teas whilst the balance was absorbed by Russia, CIS, China and Hongkong.

The Low grown market this week for all categories was fully firm to marginally easier. However, there was good demand from most buyers.

This week's auction comprised of **11,627** lots with a total quantity of **5,775,708** kgs.

The catalogue wise breakdown was as follows:-

	Lots	Qty. (Kgs)
Low Grown Leafy	2,051	805,740
Low Grown Semi Leafy	1,594	683,161
Low Grown Tippy	2,031	952,653
High & Medium	1,677	728,132
Off Grade/BOP1A	2,515	1,302,598
Dust	568	485,408
Premium Flowery	399	52,748
Ex-Estate	792	765,268
Total	**11,627**	**5,775,708**

In Lighter Vein

Saving Money

"Hey, cabby!

How much to take me to the station?"

"Five bucks, sir."

"And how much for my suitcase?"

"No charge for the suitcase, sir."

"Okay. Take the case and I'll walk."

LOW GROWN TEAS

LEAFY/SEMI LEAFY

BOP1 : Select best BOP1's maintained last week levels. Below best teas maintained. Poorer sorts irregularly lower.

OP1 : Wiry OP1's declined by Rs.50-100/- per kg. Others too eased further.

OP : Well-made OP's were firm. Below best and poorer sorts were irregular to lower.

OPA : Select best OPA's maintained. Others were irregular to lower.

PEK/PEK1 : Shotty PEK's appreciated by Rs.50-100/- per kg. Balance too appreciated by R.50-100/- per kg. Well-made PEK1's were firm to dearer. Balance too appreciated further.

Quotations (Rs./Kg)	Best		Below Best		Others	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
BOP1	**1350-2900**	1400-3000	**1000-1150**	1000-1200	**850-900**	850-950
OP1	**1400-3200**	1450-3200	**1150-1250**	1100-1200	**700-850**	750-850
OP	**1200-1800**	1250-1600	**1050-1200**	1000-1150	**800-870**	820-870
OPA	**1200-1950**	1250-1750	**1100-1200**	1000-1150	**800-850**	820-870
PEK/PEK1	**1600-2850**	1500-2550	**1300-1400**	1200-1300	**1100-1150**	1000-1100

TIPPY/SMALL LEAF

BOP/BOPSP : In general, were firm.

BOPF/BOPFSP : BOPF's were firm on last.

FBOP/FBOP1 : Select best FBOP's were firm to easier, whilst the Best together with Below Best varieties firm to dearer. Balance eased. However, selection of bolder varieties appreciated, whilst the balance sold at last levels. FBOP1's were fully firm.

FBOPF/FBOPF1 : Very Tippy Teas were firm to easier, whilst the Best and Below Best were firm on last. Balance were irregular following quality. FF1's in general firm.

FBOPFSP : Select best very tippy teas maintained, others too followed similar trend.

FFEXSP/SP1 : Select Best long tippy varieties were irregularly lower, whilst others maintained.

Quotations (Rs./Kg)	Best		Below Best		Others	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
BOP/BOPSP	**2150-2750**	1950-2200	**1800-2000**	1700-1850	**1650-1760**	1550-1650
BOPF /BOPFSP	**1900-2250**	1850-2400	**1650-1750**	1600-1750	**1380-1550**	1360-1500
FBOP/FBOP1	**2000-2650**	2000-2550	**1750-1900**	1750-1900	**1600-1700**	1600-1700
FBOPF/FBOPF1	**1650-1850**	1650-1750	**1500-1600**	1500-1600	**1400-1450**	1400-1450
FBOPFSP/EXSP	**4950-5900**	4950-6000	**3800-4700**	3800-4600	**2950-3500**	2900-3500

MEDIUM GROWN LEAFY/SEMI LEAFY TEAS

FBOP : Select best on offer was maintained. Others and the below best tended irregular. Teas at the lower end were firm.

FBOPF/FBOPF1 : Well-made teas on offer met with fair demand. Below best types tended irregular. Teas at the lower end were firm on last levels.

PEK/PEK1 : Shotty well-made PEK1's types sold well. The bold PEK types too were firm to dearer. Lower end types too were irregularly lower.

Quotations (Rs./Kg)	Best		Below Best		Others	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
FBOP	**1500-2400**	1500-2150	**1050-1500**	1100-1500	**980-1050**	980-1100
FBOPF/FBOPF1	**1350-1650**	1300-1600	**1200-1350**	1150-1300	**1100-1200**	1100-1150
PEK/PEK1	**1500-1950**	1400-2000	**1000-1500**	1000-1400	**850-1000**	900-1000

HIGH GROWNS TEAS

MARKET: Irregular

BOP : Best Western's - A few select invoices were firm and Rs.20-40/- per kg dearer, whilst the others were mostly firm. In the Below Best category, a range of invoices gained up to Rs.50/- per kg and more, whilst the others were irregular. Teas at the lower end of the market were generally firm up to Rs.50/- per kg dearer. Nuwara Eliya's were irregular. Uda Pussellawa's were firm Rs.20-40/- per kg dearer. Uva's - Seasonal teas continued to sell well with prices ranging from Rs.2,500-3,600/- per kg, whilst the other non-seasonal types with reasonable brightness appreciated by up to Rs.100/- per kg.

BOPF : Best Western's - Select invoices gained by Rs.20-40/- per kg and substantially more following special inquiry, whilst the others were firm to dearer to a lesser extent. In the Below Best category, a selection of improved teas gained by Rs.50-100/- per kg and more following special inquiry, whilst the others were irregular. Teas at the lower end were firm and Rs.20-40/- per kg dearer. Nuwara Eliya's were irregular. Uda Pussellawa's were firm and dearer. Uva's - Seasonal teas, a majority of the invoices sold between Rs.2,200-2,550/- per kg, whilst the other non-seasonal types gained up to Rs.100/- per kg.

Quotations (Rs./Kg)	BOP		BOPF	
	This Week	Last Week	This Week	Last Week
Best Westerns	**1240 – 1400**	1140 – 1400	**1280 – 1550**	1220 – 1440
Below Best Westerns	**1100-1220**	1040 - 1100	**1180 – 1260**	1140 – 1200
Plainer Westerns	**980 – 1080**	900 – 1020	**1040 – 1160**	1000 – 1120
Nuwara Eliyas	**1220**	N/A	**1200 - 1220**	1200 - 1220
Brighter UdaPussellawas	**1000**	N/A	**1080 – 1140**	1000 – 1020
Other Uda Pussellawas	**880-920**	N/A	**860 – 900**	850 – 900
Best Uva's	**2500-3600**	2150-3700	**2250 – 2550**	2250 – 2600
Other Uva's	**1100-1300**	1020-1150	**1200 - 1300**	1060 - 1180

MEDIUM GROWN TEAS

BOP : Gained by Rs.50/- per kg and more.

BOPF : Better sorts were firm and tended marginally dearer, whilst the others were firm.

Quotations (Rs./Kg)	BOP		BOPF	
	This Week	Last Week	This Week	Last Week
Best Westerns	**820 - 1750**	830 - 1750	**850-1160**	840-1200

CTC TEAS

HIGH GROWN:-

BP1 - Hardly any offerings.

PF1 - A few select invoices sold around last, whilst the others were irregular.

MEDIUM GROWN:-

BP1 - Irregular.

PF1 - Select Best were firm, whilst the others were irregular following quality.

LOW GROWN:-

BP1 - Firm.

PF1 - Firm to tended dearer.

Quotations (Rs./Kg)	BP1		PF1	
	This Week	Last Week	This Week	Last Week
High	**N/A**	N/A	**920-1160**	920-1180
Medium	**840 – 900**	690 - 730	**670-1180**	690-1180
Low	**890 - 1360**	1000 - 1260	**920-1460**	680-1440

OFF GRADES

FGS/FGS1 : Well-made FNGS/FNGS1 were firm on last. Best and Below Best varieties advanced Rs.25-50/- per kg. Low Grown select best FNGS/FNGS1 were firm to dearer Rs.20/-. Below best and poorer teas held firm. Select best BM's firm on last. Best types and below best types tending lower Rs.20-40/- per kg.

BOP1A : Select best BOP1A's firm on last. Best teas held firm others were firm to lower by Rs.20-30/- per kg.

QUOTATIONS (Rs./kg)	HIGH		MEDIUM		LOW	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
Good Fannings (Orthodox)	**820-870**	800-850	**780-840**	780-840	**820-860**	810-850
Good Fannings (CTC)	**720-830**	720-830	**730-790**	730-790	**740-770**	740-780
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	**800-860**	820-860	**790-860**	800-860	**810-870**	820-970
Other BM's	**690-750**	710-760	**670-730**	680-730	**650-740**	670-750
Best BOP1As	**900-920**	900-910	**850-870**	850-870	**1100-1400**	1100-1380
Other BOP1As	**760-790**	790-830	**750-800**	790-830	**760-840**	780-850

DUST

DUST/DUST1: High Grown liquoring Teas gained Rs/50-80/- per kg following quality. Mid Growns maintained last levels. Select best Low Growns were firm to dearer, whilst others declined Rs.50-100/- per kg.

PD : High grown PD's gained Rs.30-50/- per kg whilst the Mid Growns were irregularly dearer by Rs.20-40/- per kg. Low Growns maintained last levels.

QUOTATIONS (Rs./kg)	HIGH		MEDIUM		LOW	
	This Week	Last Week	This Week	Last Week	This Week	Last Week
Good Primary Dust1 (Orthodox)	**860 – 1650**	800 – 1650	**830 – 1260**	780 – 1200	**820– 1500**	780 – 1400
Good Primary PD (CTC)	**800 – 1160**	770 – 1160	**820 – 1180**	780 – 1180	**820 – 1400**	800 – 1360
Secondary Dust	**830 - 1060**	800 - 1020	**760 - 800**	760 - 770	**820 - 1300**	800 - 1160

WESTERN MEDIUM

***Ancoombra**	**BOP**	**1750/-**
Dartry Valley	BOP	1600/-
***Uplands**	**BOPSP**	**1500/-**
***Ancoombra**	**BOPSP**	**1480/-**
***Vellai Oya**	**BOPF**	**1160/-**
Harangalla	BOP1	2150/-
Craighead	FBOP/FBOP1	2400/-
***Ancoombra**	**FBOPF/FBOPF1**	**1650/-**
***Hatale**	**FBOPF/FBOPF1**	**1650/-**
Harangalla	FBOPF/FBOPF1	1650/-
Dartry Valley	FBOPF/FBOPF1	1600/-
***Uplands**	**FBOPF/FBOPF1**	**1550/-**
***Galgewatta**	**FBOPF/FBOPF1**	**1550/-**
Greenwood	OP/OPA	1400/-
Craighead	OP1	1850/-
Greenwood	PEK/PEK1	1950/-
***Meezan**	**PEK/PEK1**	**1900/-**
Uplands	PEK/PEK1	1900/-

WESTERN HIGH

Inverness	BOP	1460/-
Wanarajah	BOP	1400/-
Alton	BOPF/BOPFSP	1550/-
Inverness	BOP1	1500/-
Bambrakelly	FBOP/FBOP1	1600/-
Bambrakelly	FBOPF/FBOPF1	1420/-
Craig Hill	OP/OPA	1080/-
Venture	OP1	1300/-
Bambrakelly	OP1	1300/-
Frotoft Super	PEK/PEK1	1800/-

NUWARA ELIYA

Lovers Leap	BOP	1220/-
Lovers Leap	BOPF/BOPFSP	1220/-
Court Lodge	BOP1	1200/-
Court Lodge	FBOP/FBOP1	820/-
Kenmare	FBOPF/FBOPF1	900/-
Court Lodge	OP/OPA	960/-
Court Lodge	PEK/PEK1	1200/-

CTC TEAS

HIGH GROWN

***Dunsinane CTC**	**PF1**	**1160/-**

MEDIUM GROWN

Delta CTC	BP1	900/-
Strathdon	PF1	1180/-

LOW GROWN

Ceciliyan CTC	BP1	1360/-
Kalubowitiyana CTC	PF1	1460/-
Hingalgoda CTC	PF1	1460/-

UVA MEDIUM

St.James	BOP	2750/-
Halpewatta Uva	BOPSP	1650/-
St.James	BOPF/BOPFSP	2500/-
Demodera 'S'	BOP1	2150/-
Aruna Passara	FBOP/FBOP1	1700/-
***Roseland Uva**	**FBOPF/FBOPF1**	**1500/-**
Demodera 'S'	FBOPF/FBOPF1	1500/-
Aruna Passara	OP/OPA	1180/-
Sarnia Plaiderie	OP/OPA	1180/-
Sarnia Plaiderie	OP1	1750/-
Aruna Keppetipola	PEK/PEK1	1800/-
Misty Uva	PEK/PEK1	1800/-
***Roseland Uva**	**PEK/PEK1**	**1750/-**

UVA HIGH

Uva Highlands	BOP	3600/-
Craig	BOPSP	1380/-
Uva Highlands	BOPF/BOPFSP	2550/-
Ranaya	BOP1	1460/-
Ranaya	FBOP/FBOP1	1700/-
Craig	FBOPF/FBOPF1	1480/-
Ellathota Uva	OP/OPA	1180/-
Ellathota Uva	OP1	1440/-
Ranaya	PEK/PEK1	1850/-

UDAPUSSELLAWA

***Mooloya**	**BOP**	**1000/-**
Luckyland	BOPF/BOPFSP	1180/-
Delmar	FBOP/FBOP1	1320/-
Delmar	FBOPF/FBOPF1	1460/-
Gampaha	OP/OPA	1160/-
Delmar	OP1	1340/-
***Delmar**	**PEK/PEK1**	**1700/-**

OFF GRADES

Kothmale Hills	BP	1320/-
***Chandrika Estate**	**BP**	**1280/-**
***Narangala Super**	**BP**	**1200/-**
Hingalgoda CTC	PF	1300/-
Kurunduwatta	BM	1240/-
Agraouvah	FNGS/FNGS1	1260/-
Chandrika Estate	BOP1A	1480/-
Aldora	BOP1A	1480/-

LOW GROWN LEAFY GRADES

Pothotuwa	BOP1	2900/-
***Makandura**	**BOP1**	**2750/-**
Susantha	OP1	3200/-
Miriswatta	OP	1800/-
Miriswatta	OPA	1950/-
Liyonta	PEKOE	2600/-
Lumbini	PEKOE	2500/-
***Maknadura**	**PEKOE**	**2250/-**
Liyonta	PEKOE1	2850/-

LOW GROWN TIPPY GRADES

***Elaine Super**	**BOP**	**2750/-**
New Spring View	BOPSP	2450/-
Stream Line	BOPSP	2100/-
***Greenwin Super**	**BOPSP**	**2000/-**
***Rain Forest**	**BOPSP**	**1950/-**
Kings Bru	BOPF	1850/-
Rajjuruwatte Super	BOPFSP	2250/-
***Greenwin Super**	**BOPFSP**	**2050/-**
***Ganganee**	**BOPFSP**	**1750/-**
***Sithaka**	**FBOP**	**2650/-**
Sithaka	FBOP1	2000/-
***Wattahena**	**FBOP1**	**1900/-**
***New Laksakanda**	**FBOPF**	**1900/-**
***Ganganee**	**FBOPF**	**1850/-**
***Sithaka**	**FBOPF**	**1850/-**
***New Nivithigala**	**FBOPF**	**1750/-**
Woodland Grand	FBOPF1	1850/-
Lakvinka	FBOPF1	1750/-
N.Kollonne Kithulgala	FBOPF1	1750/-
***Makandura**	**FBOPF1**	**1700/-**
***Hidellana**	**FBOPF1**	**1700/-**
***Sithaka**	**FBOPF1**	**1700/-**

PREMIUM FLOWERY

Stream Line	FBOPFSP	5900/-
New Batuwangala	FBOPFEXSP	5700/-
Lions	FBOPFEXSP1	5700/-

Dust

Pothotuwa	DUST	1300/-
Mattakelle	DUST1	1650/-
Kalubowitiyana CTC	PD	1400/-
Ceciliyan CTC	PD	1400/-

COLOMBO AUCTION – WEEKLY GROSS SALE AVERAGES

SALE NO.30 OF 05TH AUGUST, 2025

	2025			2024	
	Weekly	Month to Date	Year to Date	Weekly	Year to Date
Uva High Grown	1,080.99	1,094.67	1,031.54	1,078.81	1,111.48
Western High Grown	1,091.25	1,104.10	1,089.63	1,201.05	1,195.18
High Grown	1,087.67	1,100.71	1,070.79	1,162.01	1,168.38
Uva Medium	1,044.40	1,047.41	1,067.26	1,095.84	1,150.71
Western Medium	984.77	987.11	1,004.62	1,004.54	1,076.92
Medium Grown	1,003.87	1,006.12	1,025.49	1,035.37	1,102.15
Low Grown (Orthodox)	1,264.53	1,264.53	1,257.19	1,309.25	1,390.13
Combined L.G. (Orthodox + CTC)	1,243.90	1,242.17	1,242.49	1,288.07	1,365.32
Total	1,176.63	1,176.40	1,169.51	1,214.10	1,278.59

Private Sale Figures (04.08.2025 –09.08.2025) - 190,396.00 kgs

Cumulative - 6,536,209.76 kgs

DETAILS OF TEAS AWAITING SALE

	SALE NO: 32		SALE NO: 33	
	Sale of 19th /20th Aug. '25		Sale of 26th /27th Aug. '25	
	Lots	Qty. (Kgs)	Lots	Qty. (Kgs)
Low Grown Leafy	2,033	775,290	2,104	796,831
Low Grown Semi Leafy	1,592	673,019	1,587	647,166
Low Grown Tippy	1,922	898,050	1,937	882,373
High & Medium	1,507	642,921	1,414	584,890
Off Grade/BOP1A	2,458	1,268,903	2,210	1,132,197
Dust	524	458,330	469	388,137
Premium Flowery	399	53,112	442	57,284
Ex-Estate	770	732,392	749	706,423
Total	**11,205**	**5,502,017**	**10,912**	**5,195,301**

FUTURE CATALOGUES CLOSURE

Sale No.34 of 01st (Mon.) /02nd (Tue.) September, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **14th August, 2025 at 04.30 p.m.**

Sale No.35 of 09th (Tue.) /10th (Wed.) September, 2025

The Main Sale & Ex-Estate Sale catalogues are scheduled to be closed on **21st August, 2025 at 04.30 p.m.**

Sale No.36 of 16th (Tue.) /17th (Wed.) September, 2025

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

SALE NO. 32

AUCTION OF 19H /20TH AUGUST, 2025

BROKERS' SELLING ORDER

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

Crop & Weather

For the period August 05 to 12, 2025

Western/Nuwara Eliya Regions:-

The Western Region reported rain throughout the week, whilst the Nuwara Eliya Region reported bright weather. The Department of Meteorology expects rain in the Western and Nuwara Eliya regions in the week ahead.

Uva/Uda Pussellawa Regions:-

Bright weather and occasional showers were reported in both regions throughout the week. According to the Department of Meteorology showers are expected in the Uva and Uda Pussellawa regions in the week ahead.

Low Growns:-

The Low Grown Region reported bright weather throughout the week. Rain is expected in the Low Grown Region in the week ahead according to the Department of Meteorology.

Crop Intake:-

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

WORLD CROP STATISTICS (MKGS)

Country	*Month*	*2024*	*2025*	*Difference +/-*	*To-date 2024*	*To-date 2025*	*Difference +/-*
BANGLADESH	May	4.80	8.60	3.8	11.50	12.60	1.1
KENYA	March	54.34	37.93	-16.4	168.76	136.91	-31.9
MALAWI	May	4.40	4.40	0.0	31.30	29.40	-1.9
NORTH INDIA	June	121.52	112.51	-9.0	313.70	352.80	39.1
SOUTH INDIA	June	25.20	20.99	-4.2	100.38	116.92	16.5
SRI LANKA	**June**	***23.15***	***21.68***	***-1.5***	***127.95***	***135.73***	***7.8***

"Africa Tea Brokers Bulletin of Statistics"

OTHER MARKETS

LIMBE MARKET REPORT SALE 33 HELD ON 13/08/2025

There was improved demand at firm to dearer rates following quality for the 3780 packages on offer.

BP1 – N/A.

PF1 – Were firm to 16USC dearer on last.

PD - Fetched 3USC up on last where sold.

D1 – Held firm.

PF1SC – N/A.

Secondary FNGS were firm on last, respective Dusts were neglected.

WEATHER/CROP FOR THE WEEK ENDING 10TH AUGUST, 2025

It was generally warm during the day but cold at night. No rainfall was reported during the period.

Crop intakes continue low.

BANGLADESH AUCTION

SALE NO. 14 OF MONDAY, 11th August, 2025

CTC LEAF: 54,162 packages of tea on offer met with a fair demand, which slackened as the sale progressed.

BROKENS: Large Brokens met with fair interest but prices were easier than last. Smaller Brokens were fairly well supported at around last levels with only a few lines tending dearer. Plain teas once again met with a discriminating market and there were many withdrawals. BLF teas continued to meet with quite a good demand but there were more withdrawals this week.

FANNINGS : Good liquoring Fannings were in fairly good demand but were easier towards the end. Medium and plain types continued to meet with a discriminating market and prices dropped further with more withdrawals. BLF teas continued to meet with quite a good demand but there were more withdrawals this week.

DUST: 13,541 packages of tea on offer met with a fair demand with more withdrawals than last. Good liquoring Dusts were sold at easier levels and had few withdrawals.. Mediums were also an easier market with Tk.5/- to Tk.8/- less than last. Plain and BLF Dusts were an easier market and saw fair withdrawals. Blenders lent strong support with fair interest from the Loose tea buyers.

COMMENTS: There was more tea on offer this week and initially there was fair competition for good liquoring types which were fairly firm but these eased further with the progress of sale. Blenders lent a good support but owing to less competition from the Loose tea buyers particularly from the latter half of the sale and rates declined steadily.

Dusts were again an easier market.

Quotations – This Week – (In Taka)

<table>
<tr><th>Brokens</th><th>This Week</th><th>Last Week</th><th>Fannings</th><th>This Week</th><th>Last Week</th><th>Dust</th><th>This Week</th><th>Last Week</th></tr>
<tr><td>Best</td><td>255-260</td><td>255-265</td><td>Best</td><td>250-255</td><td>250-260</td><td>PD</td><td>245-280</td><td>245-276</td></tr>
<tr><td>Good</td><td>248-253</td><td>250-254</td><td>Good</td><td>246-249</td><td>248-250</td><td>RD</td><td>245-330</td><td>215-337</td></tr>
<tr><td>Medium</td><td>246-248</td><td>247-250</td><td>Medium</td><td rowspan="2">245-247</td><td>246-247</td><td>D</td><td>245-350</td><td>218-273</td></tr>
<tr><td>Plain</td><td>245</td><td>245</td><td>Plain</td><td>245</td><td>CD</td><td>220-289</td><td>247-345</td></tr>
<tr><td>BLF</td><td>185-220</td><td>170-225</td><td>BLF</td><td>170-225</td><td>170-225</td><td>BLF</td><td>220</td><td>215-232</td></tr>
</table>

COURTESY: NATIONAL BROKERS LTD

MOMBASA TEA AUCTION MARKET REPORT

Sale No.34 of 04TH & 05TH AUGUST, 2025

There was fair demand for the 164,390 packages (11,151,998.00 kilos) available in the market with 41.03% unsold.

MARKET:-

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

OFFERINGS :-

Leaf Grades - 86,120 packages (5,656,938.00 kilos) – 44.54% unsold.
Dust Grades - 62,900 packages (4,695,095.00 kilos) – 43.05% unsold.
Secondary Grades - 15,360 packages (799,965.00 kilos) – 13.02% unsold.

LEAF GRADES (M2 & M3)

BP1:

Best : Gained by up to USC44 while some teas shed up to USC38.

Brighter: Were up to USC14 below previous rates but others were up to USC4 dearer.

Mediums: KTDA mediums were firm to USC10 dearer to easier by up to USC9. Plantation mediums gained up to USC39 with some lines irregular at firm to USC7 dearer to easier by USC15.

Lower Medium: Dearer by up to USC30.

Plainer: Appreciated by up to USC22.

PF1:

Best : Were dearer by up to USC21 but others were irregularly discounted by up to USC15.

Brighter : Mostly dearer by up to USC21 with few select lines USC3 below last levels.

Mediums : KTDA mediums were mostly dearer by up to USC9 to easier by a similar margin with plantation medium appreciating by up to USC22.

Lower Medium : Steady to mostly dearer by up to USC22 but select invoices lost up to USC6.

Plainer : Irregular ranging between firm to USC12 above previous levels to easier by up to USC7.

CTC QUOTATIONS	BP1 – USC	PF1 – USC
Best	270 – 540	296 – 357
Good	250 – 306	280– 325
Good Medium	230 – 323	284– 311
Medium (KTDA)	170 – 202	170 – 262
Medium (Plantations)	157– 211	170 – 202
Lower Medium	126 – 166	128 – 178
Plainer	090– 130	080– 124

DUST GRADES (M1)

PDUST:

Best:	Were easier by up to USC32.
Brighter:	Firm to USC12 above previous levels to USC10 easier.
Mediums:	KTDA mediums were firm to USC7 dearer to easier by up to USC19 while plantation mediums held steady to USC3 dearer to easier by up to USC5.
Lower Medium:	Met irregular interest at firm to mostly dearer by up to USC11 but select lines shed by up to USC8.
Plainer:	Saw irregular enquiry and varied between steady to USC6 dearer to easier by up to USC8.

DUST1:

Best:	Irregular and ranged between USC12 easier but select invoices were up to USC10 above last rates.
Brighter:	Steady to USC16 dearer to easier by up to USC10.
Mediums:	KTDA mediums were up to USC10 above last levels to easier by up to USC8 while plantation mediums were firm to USC3 dearer to easier by up to USC4.
Lower Medium:	Were USC3 dearer to USC4 below previous rates.
Plainer:	Were irregular varying between firm to USC7 dearer to easier by USC6.

CTC QUOTATIONS	PDUST1 – USC	DUST1 – USC
Best	250 – 322	270 – 372
Good	250– 301	264 – 301
Good Medium	250– 276	259– 320
Medium (KTDA)	180 – 231	180 – 266
Medium (Plantations)	150 – 184	159– 181
Lower Medium	127 –171	127 – 164
Plainer	082 – 127	089 – 124

SECONDARY GRADES(S1)

In the Secondary Catalogues, best **BPs** held value with select types up to USC12 dearer while others were irregular; **PFs** were well absorbed at firm rates. Clean well sorted coloury **Fannings** gained while **similar DUSTs** were steady. **Other Fannings** held value with **DUSTs** irregular but on balance firm. **BMFs** were readily absorbed.

SECONDARY QUOTATIONS (USC)	BP / BP2	PF / PF2	FNGS1 / FNGS	DUST / DUST2	BMF
Best / Good	185 – 271	186 – 251	130 – 244	129 – 298	-
Good Medium / Medium	-	-	110– 158	110 – 181	-
Lower Medium	104 – 148	107 – 144	090 – 128	086– 131	100 – 110
Plainer	086– 117	081 – 111	082– 103	083 – 110	084 – 098

August 13th 2025
-/tp.

International Tea News

India's Tea Production Falls 9% in June 2025 amid Weather Woes and Pest Attacks

India's tea industry faced a setback in June 2025, with production dropping by 9% to 133.5 million kg, compared to 146.72 million kg in June 2024, according to data released by the Tea Board of India. The decline was mainly due to adverse weather conditions and pest infestations, severely impacting both big planters and small growers across North and South India.

Reasons Behind the Decline

Adverse weather conditions disrupted tea gardens in major growing states. Pest infestations further reduced crop yield, especially in Assam and West Bengal. The Indian Tea Association noted that both large estates and small-scale farmers faced output losses.

Regional Production Trends

North India (Assam & West Bengal)

- **June 2025:** 112.51 million kg
- **June 2024**: 121.52 million kg
- Largest share of the decline due to erratic monsoons and pest attacks.

South India (Kerala, Tamil Nadu, Karnataka)

- **June 2025:** 20.99 million kg
- **June 2024:** 25.20 million kg
- Drop linked to excessive rainfall and leaf diseases.

Impact on Growers

Big & Organized Planters

- Produced 55.21 million kg in June 2025
- Down from 68.38 million kg in June 2024

Small Growers

- Produced 68.28 million kg in June 2025
- Down from 78.34 million kg last year

Tea Varieties Affected

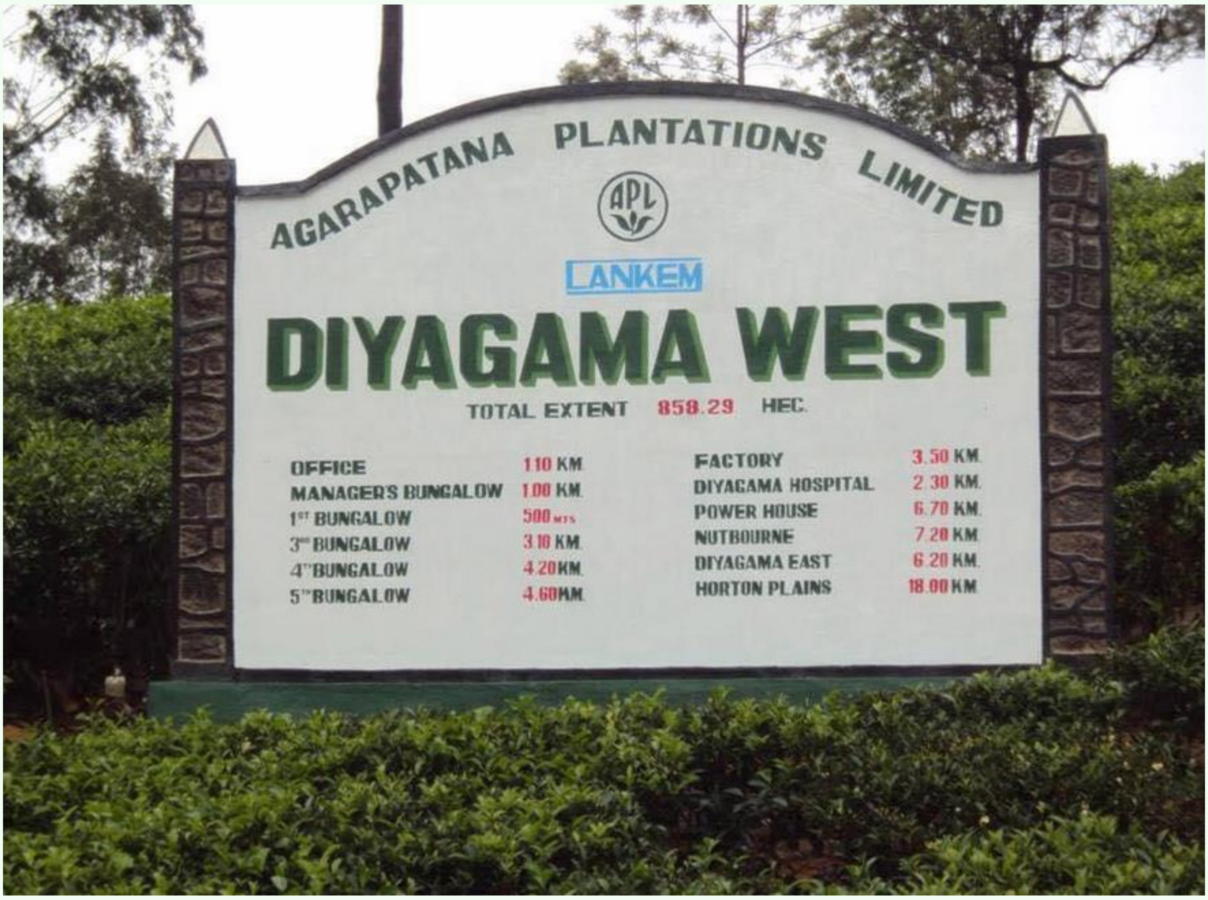
CTC (Crush, Tear, Curl): 117.84 million kg (major share of production)

Orthodox Tea: 13.82 million kg

Green Tea: 1.84 million kg

The decline affected all three categories, threatening both domestic supply and exports.

Diyagama West Estate and its timeless legacy of tea innovation and sustainability



Set amidst the vibrant, emerald hills of Sri Lanka's central highlands, where waterfalls cascade down cliffs and clouds brush against towering peaks, Diyagama West stands as a tea estate so expansive, rich in history and self-sustaining that it functions more like a hidden kingdom than a plantation where only a few places in the country so seamlessly blend colonial legacy, ecological richness and cutting-edge sustainability.

With over 858 hectares of cultivated land, a resident population of more than 7,000 and tea bushes that date back over 125 years, Diyagama West stands as a timeless giant in Sri Lanka's central hills, a place where history, community and innovation come together to create some of the finest tea the island has ever known.

Diyagama West Estate is located directly below the southern edge of Horton Plains National Park and features lush tea plantations interspersed with patches of secondary forest and jungle, supporting a rich diversity of flora and fauna including endemic birds, hill country leopards and wildlife typical of Sri Lanka's central highlands. The estate is owned by Agarapatana Plantations PLC, a subsidiary of Lankem Developments PLC and managed by Lankem Tea & Rubber (PVT) Ltd.

The estate's roots run deep. Established in the 1870s under the name Diyagama, it began as a coffee plantation owned by the Dimbula Coffee Company Ltd. At the time, it stretched across a colossal 3,000 acres divided into five divisions. But as coffee wilted under the weight of disease in the 1880s, Diyagama transformed itself. In 1885, it began its journey into tea with a modest 100-acre plot. By 1887, it had expanded to over 1,500 acres, and by the turn of the century, Diyagama had become one of the largest tea plantations on the island. The estate eventually split into two in 1948, Diyagama West and East, with Diyagama West inheriting two-thirds of the original land.

Situated in the Agrapatana sub-district of the Nuwara Eliya region, Diyagama West climbs from 1,372 metres to 2,057 meters above sea level, making it ideal for cultivating high-grown tea. The estate enjoys global prestige, with its Dimbula-season teas marketed in the UK by Taylors of Harrogate as straight-line, garden-fresh teas. During the quality season, from January to March, Diyagama West produces some of the most prized light, bright teas that command top prices at the Colombo auction. Its ability to craft semi-leafy teas has also earned it record-breaking recognition.

Revolutionizing tea production through innovation

Beyond its reputation for tea, Diyagama West is also an estate defined by innovation and sustainability. It proudly features Sri Lanka's first hydro power unit to tap the cascading waters of Horton Plains, a facility first commissioned in 1936 that remains functional to this day. This very stream, born in the pristine heights of the plains, not only powers the estate but nourishes its people and ecosystem. The estate's original tea factory, constructed in the same year, sits at an elevation of over 1,500 meters above sea level and processes 30,000 kilograms of green leaf per day. The factory is currently undergoing a transformation to become Sri Lanka's first fully automated upcountry Rotorvane tea factory, a leap that represents the future of tea production.

While innovation powers its future, heritage defines its soul. In a division named Nutbourne, tea bushes planted over a century ago still stand. These old seedling teas, growing at an elevation of 6,500 feet, have won international awards in competitions held in the USA and Dubai. Another first for the estate was its successful trial of TRI 5000 series cultivars, which introduced a new chapter of high-yield tea to the upcountry region.

Diyagama West can be called a community built on care and continuity. With a workforce of over 670 and a total population exceeding 6,700, the estate operates almost like a small town. Two schools serve the children of estate workers, and a 50-bed hospital which is now under the Ministry of Health, provides healthcare, led by a resident MBBS-qualified doctor. A variety of community initiatives have been implemented in collaboration with the Plantation Human Development Trust. These include nutrition programmes, school supply drives, pre-school construction, re-roofing of line rooms and the creation of a community cultural hall.

Growing a Sustainable Legacy

Social development at the estate is balanced with ecological care. Diyagama West has earned ISO, Rainforest Alliance and Carbon Footprint certifications for its commitment to environmental stewardship. Surrounded by crown forest on one side and Horton Plains on the other, the estate prioritizes sustainable agricultural practices such as composting, forking, dolomiting and carefully maintaining buffer zones near sensitive natural areas. To counteract changing climate patterns and labour shortages, the estate has introduced machine harvesting across 100 hectares and implemented gravity-fed irrigation systems to preserve water and boost yields.

Diyagama West Estate is a top producer that contributes over one million kilograms of made tea annually, which makes it a key player in Sri Lanka's economy through both foreign exchange and employment. It is, in every sense, a self-sufficient community of the tea country, which is also a blend of nature, history, and hard work. Diyagama West remains the flag bearer of the Agrapatana region and a living monument to the island's tea legacy. In its winding roads, all 110 kilometers of them, and in the smiles of its people, in the scent of fresh tea leaves and the hush of highland winds, the spirit of Sri Lanka's hill country thrives.

Assam: Compared to last year, tea production falls in June 2025

Tea production in Assam and the country as a whole has seen a sharp decline in the month of June. As per the Tea Board of India's latest report, the tea production in the country was down by 13.22 million kg in June 2025, as compared to the production in June 2024. Assam also saw its share of decline, with tea output going down by 7.36 million kg.

The all-India production of tea in June 2025 was 133.50 million kg, against the figure of 146.72 million kg in June 2024. Of the 133.50 million kg of tea, 55.21 million kg was produced by the big growers, while the remaining 78.29 million kg was contributed by small growers. Moreover, of the total tea production in June this year, 117.84 million kg comprised CTC, 13.82 million kg Orthodox, and 1.84 million kg comprised

GREEN TEA

In June 2025, Assam produced 68.55 million kg of tea, of which 34.23 million kg was the contribution of big growers, while 34.32 million kg was produced by small growers in the state. Again, in June 2025, the lion's share of tea was produced in Assam, amounting to more than 50% of the total tea produced in the country. It is to be noted that Assam produced 75.91 million kg of tea in June 2024, thus amounting to a fall of 7.36 million kg in Assam's tea production from last year.

The Tea Board report also stated that, in the first six months of 2025, the country as a whole produced 469.72 million kg of tea, of which Assam's share was 200.48 million kg.

The fall in Assam's tea production in June 2025 is attributed to the erratic weather, brought about by the spectra of climate change in this part of the country. The normal weather pattern in Assam is light to moderate rain in the nighttime and bursts of sunshine in the day, which is considered favourable for the production of bountiful and prime green tea leaves, the ingredient for manufacturing good-quality made tea.

China’s bubble tea boom brews rural growth, international presence

Although the traditional spring harvest season is now over, in the humming workshop of a tea company in the city of Shengzhou, east China’s Zhejiang Province, the aroma of fresh leaves still lingers in the air, while workers operate machines in churning out batches of vibrant green tea.

More than 4,000 km away, Latifahtul Khoiriyah in Jakarta, Indonesia, took a taxi during her lunch break on a sweltering summer’s day, making this trip especially to try out the bubble tea of Chinese brand CHAGEE.

This white collar worker in the finance sector learned about CHAGEE on social media like TikTok and Instagram.

“It tastes good,” she said, adding that compared with some other bubble brands, CHAGEE is less sweet, while its packages are of better design.

“Jasmine has a light and rich floral flavor which is extremely refreshing, while the Oolong tea has a deeper aftertaste of roasted cream,” said another customer named Raditya.

“It is evident that high-quality tea is used in CHAGEE.”

Featuring diverse flavors, achieved by combining ingredients such as fresh fruits, tea leaves, milk and cheese, China’s new-style tea beverage has expanded its market rapidly in recent years, capturing the hearts of customers across China and also overseas.

Data released by iiMedia Research shows that in 2024, China’s new-style tea beverage market value exceeded 350 billion yuan (about US$48.5 billion) – up 6.4 per cent from a year earlier, while the market value is expected to reach 374.93 billion yuan by the end of 2025.

Fragrance spreading overseas

A report by Nanfang Metropolis Daily suggested that Chinese new-style tea beverage brands began opening outlets overseas in the 2010s at an accelerating pace.

According to the National Business Daily, by the end of last year, Chinese new-style tea beverage brands had opened more than 5,000 outlets overseas.

While various Chinese bubble brands could be seen in many Western cities such as London and Sydney, Southeast Asia emerged as one of their major markets.

HEYTEA, which boasts over 4,000 stores worldwide, launched its first overseas store in Singapore in 2018.

Naixue opened its first overseas flagship outlet last year in Bangkok's well-known shopping center Central World, sparking a frenzy among young consumers.

On April 11 this year, CHAGEE opened three outlets in Jakarta. By July 15, this number had grown to eight.

In its PIK Avenue outlet, sales topped 10,000 cups in the first three days of its opening, while the number of membership registrations exceeded 5,000 within one week.

Mixue is arguably the most popular Chinese bubble tea brand in Indonesia with more than 2,600 outlets.

By the end of 2024, Mixue had created jobs for about 12,800 people in Indonesia.

According to Han Wenchao, who is in charge of operations at the Mixue Indonesian branch, they have about 250 staff members – of whom more than 96 per cent are locals.

Redefining tea culture

Chen Fuqiao, an associate researcher with the Chinese Academy of Agricultural Sciences (CAAS), noted that the popularity of new-style tea beverages reflected the aspirations of the people, especially the young, who favor healthy drinks and emotional release.

The new-style tea beverage has become a window for people to learn the traditional Chinese tea culture, he said.

According to a report released by the CAAS, 46.9 per cent of young Chinese gain a better understanding of traditional tea during the consumption of new-style tea beverages, and 74.3 per cent expressed willingness to try traditional tea after tasting a new-style tea beverage.

The rapid rise of such brands has reshaped the tea supply chain in recent years. China produces about 3 million tonnes of tea leaves each year – involving around 80 million farmers.

Soaring demand for raw tea materials has opened up new opportunities for making use of previously underutilised summer and autumn tea resources, Chen said.

"We've invested tens of millions of yuan in three digital production lines," said Xu Jie, deputy general manager of the Zhejiang Wafa Tea Co Ltd.

"Right now, we're rushing to fulfill base tea orders for several domestic tea beverage brands."

In the first half of 2025, Wafa Tea produced 1,300 tonnes of Longjing raw tea, supporting the development of 30,000mu of tea gardens and generating over 40 million yuan in sales.

Full-year sales are expected to exceed 70 million yuan, according to Xu.

“Longjing tea is one of Zhejiang’s most iconic products,” said Lu Debiao, a tea expert at the Zhejiang Provincial Department of Agriculture and Rural Affairs.

“The integration of the Longjing brand with the booming new-style tea beverage sector has become a recent highlight, injecting new vitality into the traditional product.”

BENEFITING RURAL GROWTH

Located in Shengzhou, the largest Longjing tea-producing area in China, Wafa Tea’s development is a microcosm of the transformation of China’s tea industry.

Shengzhou is promoting a “three-season harvest” strategy across its 210,000 mu of tea gardens.

In spring, farmers hand-pick high-end teas, while in summer and autumn, fresh leaves are harvested for targeted supply to new-style beverage makers and export processors.

This shift has helped raise annual income by over 3,000 yuan per mu, the local agriculture and rural affairs bureau revealed.

In addition to tea leaves, Chinese farmers are also reaping benefits stemming from other agricultural products.

Goodme, for example, has set up an avocado base in Menglian County of southwest China’s Yunnan Province, where the annual income of local farmers has quadrupled from 12,000 yuan to 48,000.

HEYTEA, meanwhile, has purchased matcha from Guizhou Province, also in southwest China, resulting in the scale of the matcha industry in the city of Tongren increasing by 15 fold in the space of three years.

A newcomer to the bubble tea market, NO YEYE NO TEA, with more than 2,200 outlets across China, sources osmanthus flowers from Hubei Province in central China and gardenia flowers from Sichuan Province in the country’s southwest.

“Last year we sold 7.4 million cups of osmanthus tea, using as much as 97 tonnes of flowers from the city of Xianning,” said Liu Dong, who is in charge of the company’s public affairs department.

In Sichuan, it has collaborated with the Longgushan tea company, which owns 1,000 mu of fields for the growing of gardenia.

“Our collaboration encouraged local flower-processing enterprises to upgrade their production line, and gave rise to the growth of gardenia output – from 20 tonnes to 300 tonnes a year,” said Li Jialu, general manager of the company.

Zhu Hong, a villager from Qianwei County of the city of Leshan, started growing gardenia and jasmine four years ago.

“Qianwei is famed for its flower industry, but my predecessors had never thought to become wealthy by growing flowers,” he said, while adding that his parents had once even tried to persuade him to throw away flower seedlings and change his profession.

However, the rise in popularity of new-style beverages boosted the price of gardenia in the county last year, when the market price reached more than 40 yuan per kg on average – amounting to about ten times the price in the past.

Thanks to this change, Zhu’s income from flower growing skyrocketed 20 fold last year compared with 2023.

This enabled him to buy a new car, while he was also able to contract another 1,000 mu of land – 800 mu for growing gardenia and 200 mu for jasmine.

“Some of my friends even asked me for flower-growing tips,” he told Xinhua.

“We have confidence in the prospect of new-style tea drinks.” – Xinhua

****