



J THOMAS & COMPANY PRIVATE LIMITED

KOLKATA MARKET SYNOPSIS - SALE 14 (2025 - 26)

CTC
Market Report
· Small weight of new season Assams met with good demand and sold irregularly lower than last year's opening levels.
· Plainer category and Dooars bought leaf met with less demand and saw some withdrawals.
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Buying Analysis
· Western India: Operated on the liquoring sorts
· Major blenders : Quiet
· Local/Internal: Operated Exporters: Quiet

Orthodox
Market Report
· Strong demand
· New season teas on offer witnessed good competition with Whole leaf selling at levels higher to last year and Brokens similar to last season. TGFOP1 sold between Rs 420-450/-, TGFOP sold in the range of Rs 360-400/-, GFOP witnessed better demand and sold substantially higher over last year in the range of Rs 350-400/-, FOP/OP met with better demand in comparison to 2024 and sold between Rs 310-360/-. Larger Brokens sold in the range of Rs 280-330/-. Smaller brokens irregular and sold between 270-310/-.
· BPS/BOP met with better demand and sold in the range of Rs 370-400/-. Nominal quantity of leafy Fannings sold between Rs 200-230/-. Secondaries strongly competed for and sold at levels higher compared to last year. Few old season teas readily absorbed.

Buying Analysis
· Middle East : Strong demand forthcoming
· CIS: Good Support
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DUST
Market Report
· Small weight of new season liquoring Assams met with good demand at levels similar to last years.
· Medium and plainer categories witnessed some outlots.
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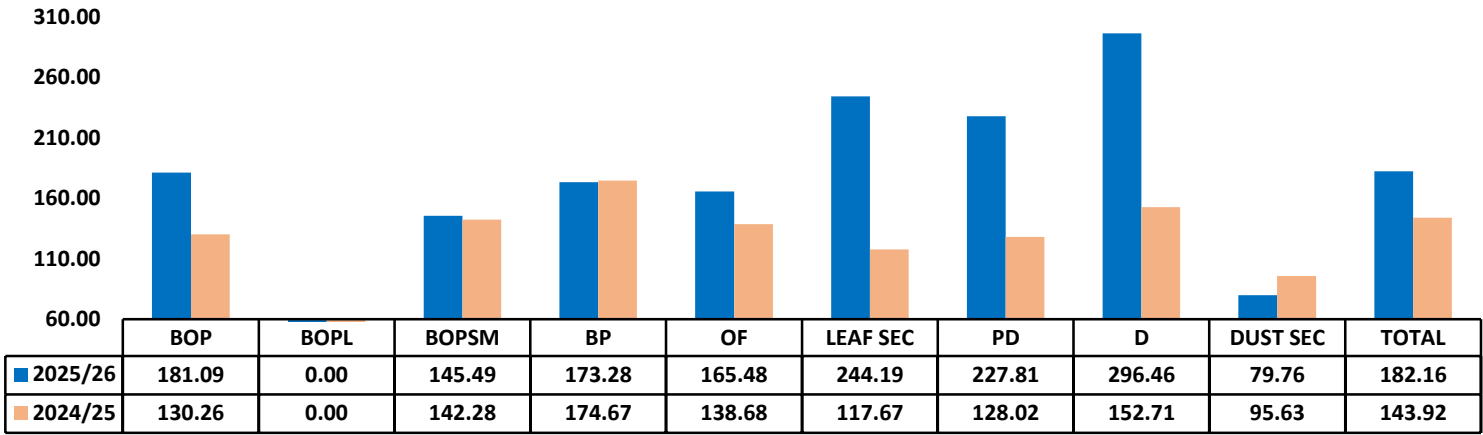
Buying Analysis
· Western India: Good Support on liquoring teas
· Hindustan Unileve: Operated
· Other Packeteers: Fair Support

Darjeeling
Market Report
· Fair demand
· All sorts sold in line with quality
· Local/Internal: Operated

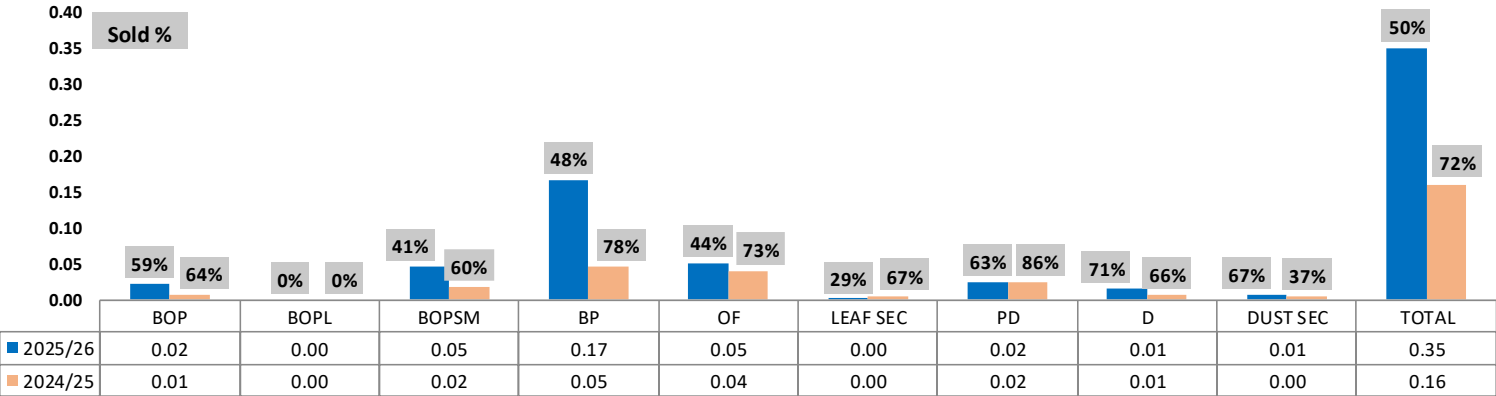
AUCTION AVERAGES									
	2025/26			2024/25			UP TO SALE 14		
	SALE 14		+/-	SALE 14		+/-	2025/26	2024/25	2023/24
CTC LEAF	175.25		-	151.57		-	175.25	151.57	197.83
DUST	226.24		-	121.45		-	226.24	121.45	218.77
TOTAL	182.16		-	143.92		-	182.16	143.92	199.49
ORTHODOX	311.63		-	251.12		-	311.63	251.12	245.65
DARJEELING	202.00		-	106.37		-	202.00	106.37	221.05
ALL TEAS	213.17		-	169.57		-	213.17	169.57	212.25

KOLKATA AUCTION AVERAGES							
SALE		14	15	16	17	18	19
CTC LEAF	2025/26	175.25					
	2024/25	151.57	182.53	232.22	202.72	230.63	234.49
DUST	2025/26	226.24					
	2024/25	121.45	176.40	262.62	219.49	242.43	217.92
TOTAL	2025/26	182.16					
	2024/25	143.92	181.92	237.64	207.06	234.45	229.26
ORTHODOX	2025/26	311.63					
	2024/25	251.12	291.88	318.56	308.28	299.86	292.15
DARJEELING	2025/26	202.00					
	2024/25	106.37	181.07	174.35	394.71	940.38	804.33

Kolkata Gradewise Averages CTC Leaf / Dust Upto Sale 14



Kolkata Gradewise Sold Quantity (M. Kgs) CTC Leaf / Dust Upto Sale 14



KOLKATA GRADEWISE ORTHODOX AVARAGES UPTO SALE 14

GRADE	2025 - 25		2024 - 25		GRADE	2025 - 25		2024 - 25		GRADE	2025 - 25		2024 - 25	
	QTY.	AVG	QTY.	AVG		QTY.	AVG	QTY.	AVG		QTY.	AVG	QTY.	AVG
TGFOP1	3809.8	409.89	685.4	393.89	FBOP	15084.2	320.68	4813.3	324.54	GBOP1/FBOP1	7282.1	231.61	1980.8	226.80
TGFOP	14530.2	386.38	3976.6	344.84	GFBOP	8773.0	303.82	2031.3	320.42	BOPF/GOF/FOF	4846.2	195.79	659.0	231.96
GFOP	6921.0	377.36	2003.1	329.06	GBOP	8008.5	279.71	1582.2	295.55					
FOP	7195.7	347.02	895.4	317.58	BPS	2754.0	390.30	1444.8	362.26					

OFFER / SOLD QUANTITY & AVERAGE PRICE CTC / DUST

	THIS SALE				LAST SALE				TO DATE			
	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
BROKENS	4,99,697	2,38,376	169.94	52%					4,99,697	2,38,376	169.94	52%
FANNINGS	1,34,054	64,736	194.42	52%					1,34,054	64,736	194.42	52%
LEAF SEC.	1,228	361	244.19	71%					1,228	361	244.19	71%
LEAF TOTAL	6,34,979.3	3,03,473.3	175.25	52%					6,34,979.3	3,03,473.3	175.25	52%
DUST	62,958	41,103	249.19	35%					62,958	41,103	249.19	35%
DUST SEC.	9,614	6,442	79.76	33%					9,614	6,442	79.76	33%
DUST TOTAL	72,572.2	47,545.0	226.24	34%					72,572.2	47,545.0	226.24	34%
TOTAL	7,07,551.4	3,51,018.3	182.16	50%					7,07,551.4	3,51,018.3	182.16	50%

OFFER / SOLD QUANTITY & AVERAGE PRICE ORTHODOX

WHOLE LEAF	48,004	47,411	360.45	1%					48,004	47,411	360.45	1%
BROKENS	46,582	42,915	310.72	8%					46,582	42,915	310.72	8%
FANNINGS	13,436	11,157	177.10	17%					13,436	11,157	177.10	17%
SECONDARY	10,295	9,109	226.60	12%					10,295	9,109	226.60	12%
ORTH. TOTAL	1,18,316.7	1,10,591.3	311.63	7%					1,18,316.7	1,10,591.3	311.63	7%

OFFER / SOLD QUANTITY & AVERAGE PRICE DARJEELING

WHOLE LEAF	281	0	0.00	100%					281	0	0.00	100%
BROKENS	86	86	202.00	0%					86	86	202.00	0%
FANNINGS	0	0	0.00	0%					0	0	0.00	#DIV/O!
DARJ. TOTAL	367.3	86.4	202.00	76%					367.3	86.4	202.00	76%

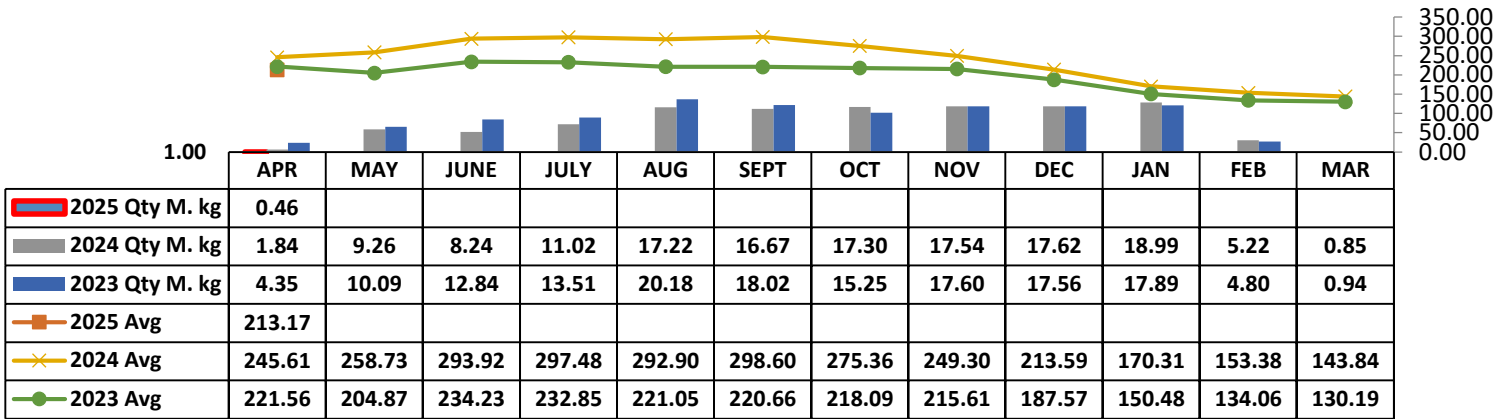
OFFER / SOLD QUANTITY & AVERAGE PRICE												
CTC	THIS SALE				LAST SALE				TO DATE			
	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	634979.3	303473.3	175.25	52%					634979.3	303473.3	175.25	52%
2024-25	165640.8	119000.9	151.57	28%					165640.8	119000.9	151.57	28%
DUST	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	72572.2	47545.0	226.24	34%					72572.2	47545.0	226.24	34%
2024-25	57350.8	40490.0	121.45	29%					57350.8	40490.0	121.45	29%
ORTHODOX	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	118316.7	110591.3	311.63	7%					118316.7	110591.3	311.63	7%
2024-25	64458.1	54385.0	251.12	16%					64458.1	54385.0	251.12	16%
DARJEELING	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	367.3	86.4	202.00	76%					367.3	86.4	202.00	76%
2024-25	6502.1	5449.0	106.37	16%					6502.1	5449.0	106.37	16%
TOTAL	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	826235.4	461695.9	213.17	44%					826235.4	461695.9	213.17	44%
2024-25	293951.8	219324.8	169.57	25%					293951.8	219324.8	169.57	25%

PRICE RANGE		CTC LEAF						DUST					
% OF TEAS SOLD		2025/26		UP TO SALE 14			2025/26		UP TO SALE 14				
		SALE 14		2025/26	2024/25	2023/24	SALE 14		2025/26	2024/25	2023/24		
BELOW 160		66.65		66.65	72.75	56.15	37.09		37.09	82.61	27.57		
BETWEEN 160.00-179.99		6.55		6.55	10.35	4.67	0.87		0.87	9.17	17.39		
BETWEEN 180.00-199.99		3.07		3.07	1.98	0.96	2.68		2.68	2.03	9.62		
BETWEEN 200.00-219.99		3.10		3.10	2.18	0.86	0.00		0.00	0.00	4.13		
BETWEEN 220.00-139.99		0.80		0.80	1.23	3.26	0.82		0.82	1.99	0.00		
BETWEEN 240.00-259.99		1.71		1.71	0.40	1.74	1.61		1.61	0.08	2.99		
BETWEEN 260.00-279.99		1.36		1.36	2.40	0.83	6.71		6.71	0.00	8.09		
ABOVE 280		16.78		16.78	8.71	31.53	50.22		50.22	4.11	30.21		

PRICE RANGE		ORTHODOX						PRICE RANGE		DARJEELING					
% OF TEAS SOLD		2025/26		UP TO SALE 14			2025/26		2025/26		UP TO SALE 14				
		SALE 14		2025/26	2024/25	2023/24	SALE 14		SALE 14		2025/26				
BELOW 200		9.55		9.55	33.38	27.70	100.00		100.00		100.00				
BETWEEN 200.00-219.99		4.44		4.44	1.52	1.63	0.00		0.00		0.00				
BETWEEN 220.00-239.99		5.05		5.05	4.71	9.04	0.00		0.00		0.00				
BETWEEN 240.00-259.99		3.18		3.18	6.91	13.36	0.00		0.00		0.00				
BETWEEN 260.00-279.99		8.44		8.44	7.90	14.51	0.00		0.00		0.00				
ABOVE 280		69.34		69.34	45.57	33.76	0.00		0.00		0.00				

FUTURE FRESH OFFERING (IN PACKAGES)															
SALE NO	THIS YEAR-2025 - 26					LAST YEAR-2024 - 25					DIFFERENCE				
	CTC LEAF	ORTHODOX	DARJEELING	DUST	TOTAL	LEAF	ORTHODOX	DARJEELING	DUST	TOTAL	LEAF	ORTHODOX	DARJEELING	DUST	TOTAL
15	10397	8179	63	1903	20542	6697	4027	487	469	11680	3700	4152	-424	1434	8862
16	16174	14932	51	3700	34857	9086	9983	73	1616	20758	7088	4949	-22	2084	14099
17	16380	31282	143	7644	55449	14558	16193	384	4334	35469	1822	15089	-241	3310	19980
TOTAL	42951	54393	257	13247	110848	30341	30203	944	6419	67907	12610	24190	-687	6828	42941

Kolkata Monthly Price Movement All Teas



CTTA BUYING (ALL TEAS) FOR THE SALE 14

	CTC LEAF			DUST					TOTAL		
	SALE 14										
OFFER	6,34,979.3		Kgs	OFFER	72,572.2		Kgs	OFFER	7,07,551.4		Kgs
SOLD	3,03,473.3		Kgs	SOLD	47,545.0		Kgs	SOLD	3,51,018.3		Kgs
SOLD %	48%			SOLD %	66%			SOLD %	50%		
ZONES	KGS.	AVG.	%		Kgs	AVG	%		Kgs	AVG	%
Local	1,39,055.4	165.39	46%	W.India	26,686.6	260.88	56%	Local	1,47,841.3	164.29	42%
W.India	48,954.0	221.31	16%	Local	8,785.9	146.92	18%	W.India	75,640.6	235.27	22%
Exports	39,907.2	128.09	13%	Exports	4,649.6	118.56	10%	Exports	44,556.8	127.10	13%
N.India	21,624.5	167.67	7%	S.India	3,254.8	291.18	7%	N.India	22,101.9	166.55	6%
Others	14,135.2	231.41	5%	HUL	1,646.8	327.34	3%	S.India	15,745.4	186.27	4%
S.India	12,490.6	158.93	4%	Others	1,169.3	126.74	2%	Others	15,304.5	223.42	4%
WI.Pack	10,778.1	289.81	4%	WI.Pack	874.6	299.58	2%	WI.Pack	11,652.7	290.54	3%
Packeteers	7,714.1	141.82	3%	N.India	477.4	116.00	1%	Packeteers	7,714.1	141.82	2%
TCPL	7,167.7	120.54	2%					TCPL	7,167.7	120.54	2%
HUL	1,646.5	167.76	1%					HUL	3,293.3	247.56	1%
Grand Total	3,03,473.3	175.25	100%	TOTAL	47,545.0	226.24	100%	TOTAL	3,51,018.3	182.16	100%

	ORTHODOX			DARJEELING			
	SALE 14						
OFFER	1,18,316.7		Kgs	OFFER	367.3		Kgs
SOLD	1,10,591.3		Kgs	SOLD	86.4		Kgs
SOLD %	93%			SOLD %	24%		
ZONE	Kgs	AVG	%		Kgs	AVG	%
Middle East	34,372.1	309.41	31%	Local	86.4	202.00	100%
Exports	18,865.9	288.74	17%				
Other Exports	18,521.3	330.24	17%				
Others	13,327.7	339.16	12%				
Local	9,924.1	234.36	9%				
CIS	8,782.6	351.99	8%				
N.India	3,425.1	388.93	3%				
CONTINENT	2,280.4	348.01	2%				
Domestic	1,092.1	184.82	1%				
TOTAL	1,10,591.3	311.63	100%	TOTAL	86.4	202.00	100%

ASSAM CTC BATTING ORDER (GTAC+CTTA) Sale 14

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
HALMARI	1645	441.63	294	470.37
BANAMALIE	641	424.82	0	0.00
DUKLINGIA	3011	390.81	613	382.41
TEEN ALI	206	390.00	0	0.00
SILONIBARI	508	381.61	310	365.77
HIRAJULI	4106	379.97	0	0.00
BIJLEEJAN	9938	373.22	1226	360.93
DEOHALL	1332	371.32	0	0.00
KOPATI	3375	366.75	5098	359.86
KENDUGURI HI GROWN	161	360.00	0	0.00
MADHUTING	1062	359.50	0	0.00
BETTYBARI	862	359.22	0	0.00
HATIJAN CLONAL	2953	355.60	0	0.00
RUNGAGORA 'J'	759	351.49	0	0.00
DOOMNI	1639	350.72	1313	388.37
DHOOIE	781	344.01	0	0.00
HARCHURAH	471	344.00	0	0.00
DILLI CLONAL	2399	343.21	774	350.77
MORANHIGHGROWN	6967	340.35	0	0.00
NARAYANPUR	811	335.91	0	0.00
DOOLAHAT	6362	333.37	0	0.00
SUNDARPUR	1058	332.26	1177	324.08
KEYHUNG	2363	325.45	0	0.00
ADDABARIEHIGHGROWN	156	321.00	0	0.00
DEHA	151	320.00	609	375.31

DOOARS CTC BATTING ORDER (STAC+CTTA) Sale 14

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
ARYAMAN SPECIAL	338	509.00	169	477.00
KARTICK	1242	421.84	1938	429.28
BARADIGHI	4434	403.07	6832	372.97
BINAGURI	13378	376.87	10279	340.53
PAHARGOOMIAH	8002	371.97	2811	364.36
GULMA	9129	367.06	2735	356.75
RYDAK	5538	363.33	4603	392.04
MORAGHAT	5197	361.34	11612	344.11
BHATKAWA	3075	353.78	1669	340.36
HOPE	2709	347.78	737	342.50
HILLAROYALE	1533	345.89	0	0.00
HANSQUA	2689	344.43	1545	324.06
KUMARGRAM	4277	342.72	633	387.85
JAYANTIKA GOLD	513	342.39	1029	335.49
DIANA (RAMBARI)	3751	340.54	4310	358.70
JITI	5033	340.16	2315	356.30
NEPUCHAPUR	8232	333.05	9763	324.62
SANKOS	2230	331.31	3239	350.82
LEESH RIVER	20206	329.62	187	301.00
MATI DHAR	15885	327.85	8638	311.16
DANGUAJHAR	4883	327.39	2239	336.08
MECHPARA	6036	326.30	4698	299.68
GOOD HOPE	3818	324.28	2996	324.14
GAIRKHATA	2086	321.61	0	0.00
HULDIBARIROYAL	9187	321.50	0	0.00

ASSAM ORTHODOX BATTING ORDER (GTAC+CTTA) Sale 14

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
BAGHJAN	5	4003.00	0	0.00
GINGIA	10	3601.00	10	4376.00
SAMDANG	5	3253.00	0	0.00
RAIDANG 'D'	5	3223.00	5	5500.00
PHILLOBARI	5	3201.00	0	0.00
BEESAKOPIE	5	2501.00	10	2800.50
DOOMNI	14	1651.00	15	811.00
DUKLINGIA	14	1110.86	0	0.00
KOILAMARI	3155	390.18	2414	358.91
DHELAKHAT	347	371.19	349	336.68
HATTIALLI	20692	349.31	0	0.00
MAJULIGHUR	5348	341.48	1365	365.15
KOOMSONG	23085	340.46	18069	311.50
BIBEKTEA	1145	333.77	0	0.00
LANGHARJAN	2483	330.09	0	0.00
DIKSAM	1784	321.23	0	0.00
SUOLA	3630	314.29	0	0.00
MAJBARI	15954	312.95	0	0.00
RUPAI	2110	312.76	0	0.00
MAIJONGA	1901	296.72	822	294.85
MALIBRU	1329	296.63	0	0.00
AMBIKABARI	1028	293.83	268	292.62
SINGRIMARI	10336	282.90	0	0.00
PUSHPAK	400	278.23	0	0.00
KHOBONG	4295	272.27	0	0.00

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