



J THOMAS & COMPANY PRIVATE LIMITED
KOLKATA MARKET SYNOPSIS - SALE 20 (2025 - 26)

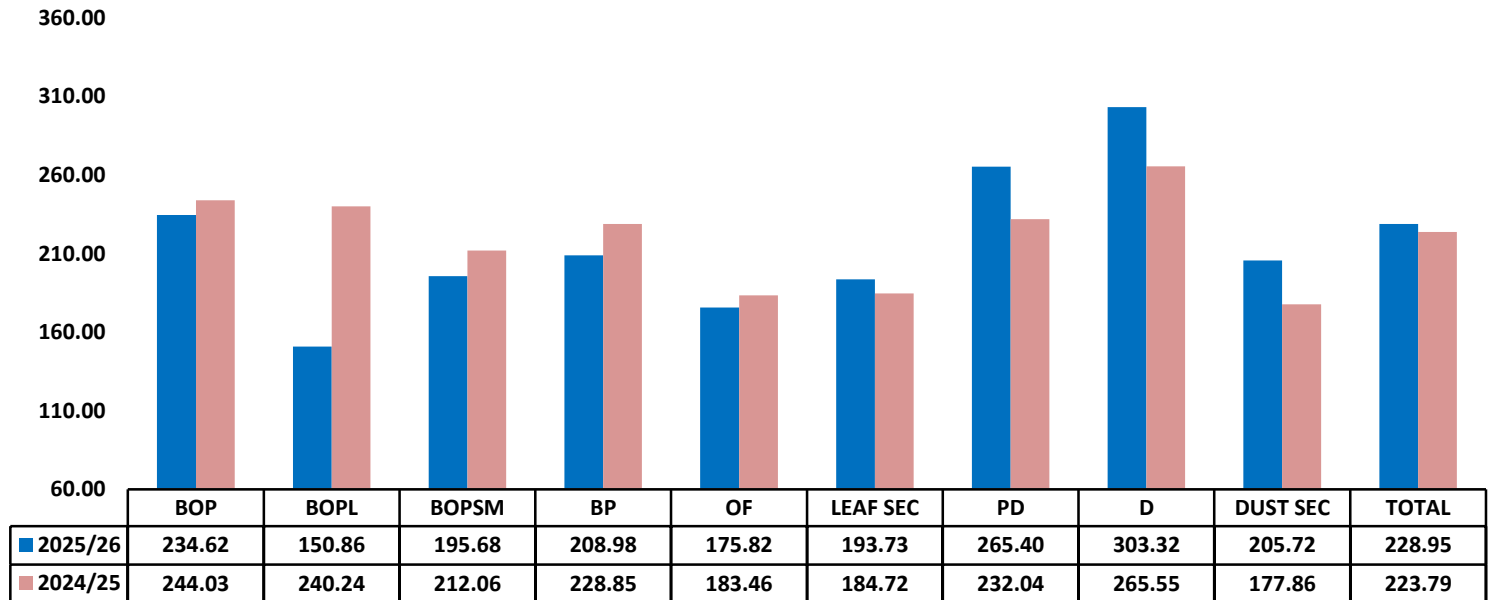
CTC	
Market Report	
• Good demand	
• Assams tended easier following decline in quality and also saw some withdrawals.	
• Medium and plainer Dooars sold around last levels.	
Buying Analysis	
• Western India: Supported the better teas	
• Hindustan Unilever: Good support TCPL: Selective	
• Exporters: Fair enquiry Local/Internal: Operated	
Orthodox	
Market Report	
• Strong demand	
• Well made Whole leaf and Larger Broken sold at firm rates. Well made Smaller Broken and cleaner Secondaries irregular around last levels.	
• Remainder Whole leaf, Broken and browner stalkier Secondaries showing a seasonal decline, irregular and at times tended lower. Leafy Fannings sold readily.	
Buying Analysis	
• Middle East : Mainstay	
• CIS: Active	
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DUST	
Market Report	
• Good demand	
• Dust sold firm to occasionally dearer.	
• PD grades barely steady noticed few outlots at times.	
Buying Analysis	
• Hindustan Unilever: Mainstay	
• Western India: Good Support	
• Local and internal: Operated	
Darjeeling	
Market Report	
• Good demand	
• Higher elevation whole leaf grades sold between Rs 900-1200/- with select preferred lines selling higher. Plainer sorts sold between Rs 500-600 with the greener teas sold upto Rs 700 with competition. Broken and Fannings sold well in line with quality.	
• Exporters: Good support Local/Internal: Mainstay Hindustan Unilever/TCPL: Did not operate.	

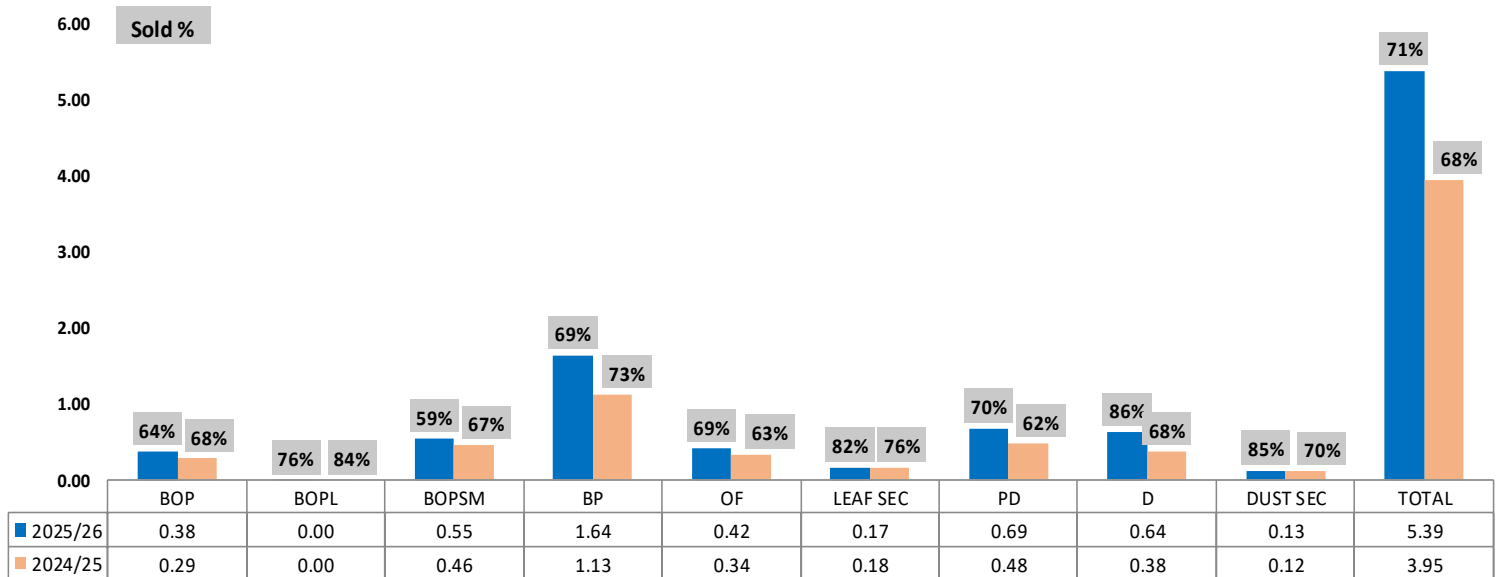
AUCTION AVERAGES									
	2025/26			2024/25			UP TO SALE 20		
	SALE 20	SALE 19	+/-	SALE 20	SALE 19	+/-	2025/26	2024/25	2023/24
CTC LEAF	210.88	234.49	-23.61	236.34	234.49	1.85	212.77	223.43	190.86
DUST	279.07	274.43	4.64	226.02	217.92	8.11	265.06	224.63	194.90
TOTAL	232.58	248.29	-15.71	232.84	229.26	3.58	228.95	223.79	191.93
ORTHODOX	323.40	325.55	-2.15	287.61	292.15	-4.53	318.69	296.47	223.99
DARJEELING	807.21	861.45	-54.24	645.23	804.33	-159.10	824.62	565.23	686.39
ALL TEAS	271.65	286.57	-14.93	261.77	261.74	0.03	268.15	258.21	210.64

KOLKATA AUCTION AVERAGES							
SALE		16	17	18	19	20	21
CTC LEAF	2025/26	215.76	206.67	233.48	234.49	210.88	
	2024/25	232.22	202.72	230.63	234.49	236.34	237.91
DUST	2025/26	273.77	265.91	261.70	274.43	279.07	
	2024/25	262.62	219.49	242.43	217.92	226.02	225.24
TOTAL	2025/26	232.03	224.03	243.90	248.29	232.58	
	2024/25	237.64	207.06	234.45	229.26	232.84	233.85
ORTHODOX	2025/26	300.65	311.85	321.42	325.55	323.40	
	2024/25	318.56	308.28	299.86	292.15	287.61	280.50
DARJEELING	2025/26	953.50	1,268.50	842.65	861.45	807.21	
	2024/25	174.35	394.71	940.38	804.33	645.23	496.50

Kolkata Gradewise Averages CTC Leaf / Dust Upto Sale 20



Kolkata Gradewise Sold Quantity (M. Kgs) CTC Leaf / Dust Upto Sale 20



KOLKATA GRADEWISE ORTHODOX AVARAGES UPTO SALE 20

GRADE	2025 - 25		2024 - 25		GRADE	2025 - 25		2024 - 25	
	QTY.	AVG	QTY.	AVG		QTY.	AVG	QTY.	AVG
TGFOP1	170875.4	425.57	133756.5	380.39	GFBOP	252160.4	318.14	267272.1	301.45
TGFOP	374685.7	392.09	304721.6	358.06	GBOP	379214.2	287.93	274717.1	285.69
GFOP	213614.8	378.54	173758.4	345.14	BPS	139295.9	385.27	154429.4	337.29
FOP	238931.4	308.90	167724.8	292.37	GBOP1/FBOP1	283476.4	221.49	247922.5	204.38
FBOP	513793.2	331.90	415188.4	311.17	BOPF/GOF/FOF	223538.6	192.50	179194.3	185.20

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	9,04,447	6,14,148	209.85	32%	6,71,505	4,89,717	235.24	27%	40,07,299	26,65,056	210.91	33%
FANNINGS	3,09,722	2,10,584	216.64	32%	2,36,213	1,65,406	236.55	30%	12,68,389	8,80,481	222.17	31%
LEAF SEC.	64,911	54,166	200.27	17%	38,215	30,116	211.03	21%	2,13,461	1,74,865	193.73	18%
LEAF TOTAL	12,79,080.7	8,78,897.5	210.88	31%	9,45,933.6	6,85,239.4	234.49	28%	54,89,148.8	37,20,402.0	212.77	32%
DUST	4,76,012	3,71,319	284.30	22%	4,05,131	3,35,123	277.96	17%	19,48,065	15,35,228	270.18	21%
DUST SEC.	49,385	38,782	228.94	21%	29,658	26,492	229.85	11%	1,56,304	1,32,509	205.72	15%
DUST TOTAL	5,25,396.7	4,10,100.9	279.07	22%	4,34,788.5	3,61,615.2	274.43	17%	21,04,369.5	16,67,736.2	265.06	21%
TOTAL	18,04,477.4	12,88,998.4	232.58	29%	13,80,722.1	10,46,854.5	248.29	24%	75,93,518.3	53,88,138.3	228.95	29%

OFFER / SOLD QUANTITY & AVERAGE PRICE ORTHODOX												
WHOLE LEAF	3,24,601	2,97,307	367.60	8%	3,80,733	3,72,715	368.44	2%	16,87,952	15,87,313	358.91	6%
BROKENS	3,26,326	3,02,072	338.07	7%	3,45,929	3,40,476	332.12	2%	16,05,295	15,01,573	323.08	6%
FANNINGS	71,773	59,214	204.29	17%	62,543	56,120	195.71	10%	3,25,539	2,55,555	190.02	21%
SECONDARY	1,09,703	1,06,661	224.77	3%	1,13,255	1,10,624	226.69	2%	4,15,260	3,95,077	223.65	5%
ORTH. TOTAL	8,32,404.0	7,65,253.8	323.40	8%	9,02,461.0	8,79,935.0	325.55	2%	40,34,045.5	37,39,518.4	318.69	7%

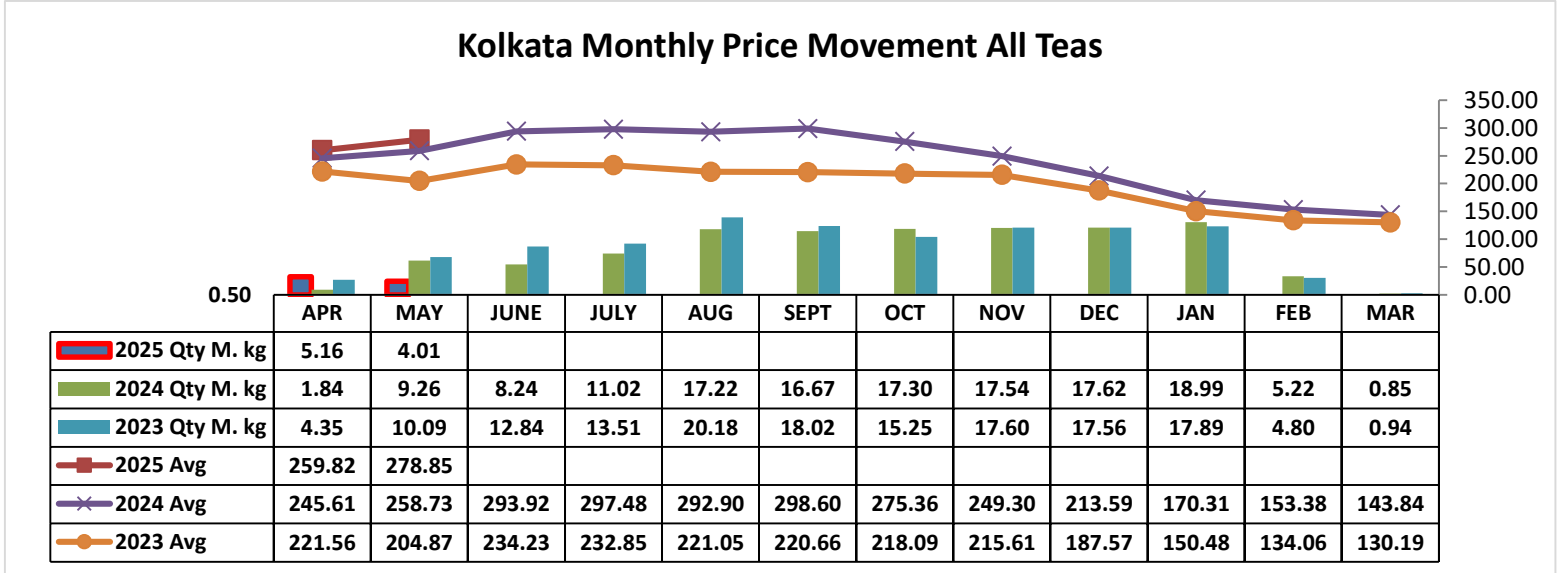
OFFER / SOLD QUANTITY & AVERAGE PRICE DARJEELING												
WHOLE LEAF	17,416	11,125	1,030.20	36%	8,040	4,795	1,254.07	40%	35,744	20,401	1,157.27	43%
BROKENS	5,417	5,417	563.40	0%	3,869	3,461	541.03	11%	11,449	11,040	533.72	4%
FANNINGS	4,079	3,544	479.83	13%	2,313	1,798	431.07	22%	9,777	8,407	399.39	14%
DARJ. TOTAL	26,911.0	20,084.5	807.21	25%	14,222.0	10,052.5	861.45	29%	56,969.0	39,848.7	824.62	30%

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	1279080.7	878897.5	210.88	31%	945933.6	685239.4	234.49	28%	5489148.8	3720402.0	212.77	32%
2024-25	955434.9	713830.6	236.34	25%	864884.2	608370.7	234.49	30%	4019764.3	2775855.1	223.43	31%
DUST	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	525396.7	410100.9	279.07	22%	434788.5	361615.2	274.43	17%	2104369.5	1667736.2	265.06	21%
2024-25	520880.7	366823.6	226.02	30%	469940.6	280781.1	217.92	40%	1776104.1	1177875.0	224.63	34%
ORTHODOX	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	832404.0	765253.8	323.40	8%	902461.0	879935.0	325.55	2%	4034045.5	3739518.4	318.69	7%
2024-25	827250.5	744235.9	287.61	10%	747354.3	685802.0	292.15	8%	3245993.0	2910310.2	296.47	10%
DARJEELING	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	26911.0	20084.5	807.21	25%	14222.0	10052.5	861.45	29%	56969.0	39848.7	824.62	30%
2024-25	50408.4	31376.6	645.23	38%	22069.0	14781.9	804.33	33%	120276.5	80643.9	565.23	33%
TOTAL	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	2663792.4	2074336.7	271.65	22%	2297405.0	1936842.0	286.57	16%	11684532.7	9167505.4	268.15	22%
2024-25	2353974.5	1856266.7	261.77	21%	2104248.0	1589735.6	261.74	24%	9162137.8	6944684.1	258.21	24%

PRICE RANGE										
% OF TEAS SOLD	CTC LEAF					DUST				
	2025/26		UP TO SALE 20			2025/26		UP TO SALE 20		
	SALE 20	SALE 19	2025/26	2024/25	2023/24	SALE 20	SALE 19	2025/26	2024/25	2023/24
BELOW 160	31.11	18.26	36.42	30.19	43.03	14.61	12.07	17.08	27.93	37.42
BETWEEN 160.00-179.99	6.35	3.64	4.82	8.69	8.04	2.37	3.07	4.60	8.55	9.63
BETWEEN 180.00-199.99	6.47	6.05	4.84	5.40	4.84	3.19	3.22	3.39	4.45	6.21
BETWEEN 200.00-219.99	5.21	3.91	3.97	6.04	7.81	7.02	3.20	3.78	6.20	6.72
BETWEEN 220.00-139.99	7.88	7.57	5.64	5.47	8.81	3.66	2.47	2.68	6.57	12.47
BETWEEN 240.00-259.99	12.81	19.00	10.36	7.07	7.40	5.21	4.72	4.48	6.90	11.46
BETWEEN 260.00-279.99	14.35	13.11	10.14	6.61	6.45	6.28	7.15	7.27	8.11	6.28
ABOVE 280	15.82	28.47	23.82	30.52	13.60	57.66	64.09	56.72	31.29	9.80

PRICE RANGE						PRICE RANGE			
% OF TEAS SOLD	ORTHODOX					% OF TEAS SOLD	DARJEELING		
	2025/26		UP TO SALE 20				2025/26		UP TO SALE20
	SALE 20	SALE 19	2025/26	2024/25	2023/24		SALE 20	SALE 19	2025/26
BELOW 200	7.86	5.84	7.18	11.55	28.23	BELOW 300.00	1.46	1.88	3.94
BETWEEN 200.00-219.99	7.36	5.70	5.26	3.01	11.29	BETWEEN 301.00-400.99	6.99	18.49	13.72
BETWEEN 220.00-239.99	5.35	5.37	4.63	4.05	16.50	BETWEEN 401.00-500.99	2.88	11.61	9.15
BETWEEN 240.00-259.99	2.82	5.20	4.36	3.73	16.34	BETWEEN 501.00-600.99	20.45	16.71	19.30
BETWEEN 260.00-279.99	5.25	5.53	7.16	6.24	8.18	BETWEEN 601.00-700.99	18.60	8.77	11.88
ABOVE 280	71.37	72.36	71.40	71.43	19.45	ABOVE 701.00	49.63	42.55	42.01

FUTURE FRESH OFFERING (IN PACKAGES)															
SALE NO	THIS YEAR-2025 - 26					LAST YEAR-2024 - 25					DIFFERENCE				
	CTC LEAF	ORTH.	DARI.	DUST	TOTAL	CTC LEAF	ORTH.	DARI.	DUST	TOTAL	CTC LEAF	ORTH.	DARI.	DUST	TOTAL
21	39246	44048	2759	16260	102313	26367	31065	3410	13306	74148	12879	12983	-651	2954	28165
22	34658	33689	1539	12338	82224	28403	31501	3568	13922	77394	6255	2188	-2029	-1584	4830
TOTAL	73904	77737	4298	28598	184537	54770	62566	6978	27228	151542	19134	15171	-2680	1370	32995



CTTA BUYING (ALL TEAS) FOR THE SALE 20											
	CTC LEAF			DUST					TOTAL		
	SALE 20										
OFFER	12,79,080.7		Kgs	OFFER	5,25,396.7		Kgs	OFFER	18,04,477.4		Kgs
SOLD	8,78,897.5		Kgs	SOLD	4,10,100.9		Kgs	SOLD	12,88,998.4		Kgs
SOLD %	69%			SOLD %	78%			SOLD %	71%		
ZONES	KGS.	AVG.	%		Kgs	AVG	%		Kgs	AVG	%
Local	2,59,024.3	181.44	29%	HUL	2,20,535.6	327.93	54%	HUL	3,53,130.1	299.11	27%
W.India	1,40,704.5	228.14	16%	W.India	63,176.6	225.19	15%	Local	2,86,293.9	180.00	22%
HUL	1,32,594.5	251.17	15%	S.India	32,207.1	270.72	8%	W.India	2,03,881.1	227.23	16%
WI.Pack	98,739.0	246.17	11%	Local	27,269.6	166.34	7%	WI.Pack	1,20,694.9	253.96	9%
Others	73,642.3	203.94	8%	N.India	22,338.7	162.52	5%	N.India	93,898.8	188.25	7%
N.India	71,560.1	196.28	8%	WI.Pack	21,955.9	289.00	5%	Others	80,831.2	206.89	6%
Exports	51,973.5	173.76	6%	Exports	12,899.8	185.35	3%	S.India	71,269.4	242.16	6%
S.India	39,062.3	218.62	4%	Others	7,188.9	237.17	2%	Exports	64,873.3	176.06	5%
TCPL	7,274.0	122.90	1%	NI.Pack	1,932.8	190.62	0%	TCPL	7,274.0	122.90	1%
NI.Pack	2,904.6	250.51	0%	Packeteers	595.9	341.00	0%	NI.Pack	4,837.4	226.58	0%
Packeteers	1,418.4	268.46	0%					Packeteers	2,014.3	289.92	0%
Grand Total	8,78,897.5	210.88	100%	TOTAL	4,10,100.9	279.07	100%	TOTAL	12,88,998.4	232.58	100%

	ORTHODOX			DARJEELING			
	SALE 20						
OFFER	8,32,404.0		Kgs	OFFER	26,911.0		Kgs
SOLD	7,65,253.8		Kgs	SOLD	20,084.5		Kgs
SOLD %	92%			SOLD %	75%		
ZONE	Kgs	AVG	%		Kgs	AVG	%
Others	2,80,127.9	325.60	37%	Local	13,845.0	751.32	69%
Middle East	1,97,866.9	329.80	26%	Exports	2,942.5	725.01	15%
Domesti c	1,00,416.6	306.30	13%	Other Exports	1,893.0	1,094.23	9%
Other Exports	46,809.4	321.78	6%	Others	928.5	1,236.39	5%
W.India	39,136.5	302.28	5%	Domesti c	337.5	825.34	2%
Local	37,515.4	304.85	5%	C.India	138.0	1,297.98	1%
CIS	32,167.2	387.49	4%				
N.India	17,421.5	272.02	2%				
Exports	13,792.4	342.60	2%				
TOTAL	7,65,253.8	323.40	100%	TOTAL	20,084.5	807.21	100%

ASSAM CTC BATTING ORDER (GTAC+CTTA) Sale 14 to 20

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
DECKIAJULI	22652	445.64	40163	406.06
GATOONGA	12327	443.63	13576	473.93
HOOKHMOL	11130	438.94	13297	439.60
MOKRUNG	7483	426.29	8404	479.23
BANAMALIE	8858	390.83	13214	373.64
HALMARI	54982	389.80	48572	424.63
HIRAJULI	19421	386.72	8753	349.82
BORSILLAH	26096	385.35	14990	335.49
HATIMARA	25758	380.80	15597	429.18
SALKATHONI	40967	372.36	405	389.81
HAROOCHARAI	10996	366.21	25827	351.30
DOOMUR DULLUNG	8113	366.14	26487	381.07
KAMARBUND	10737	364.36	9337	376.04
KHARIKATIA	12161	357.60	23939	359.72
DHULLIE	7007	356.80	4737	238.20
BIJLEEJAN	49046	355.01	27773	353.20
DUFLATING	15132	352.50	8827	377.91
HARCHURAH	5861	349.20	11364	336.63
JAMIRAH	6843	348.92	4043	300.66
SILONIBARI	16526	348.80	22211	319.49
DOOMNI	23102	348.40	49636	363.29
GELAKEY	16970	345.12	16445	332.12
MELENG (CLSPL)	13055	343.83	18501	296.02
NAHORHABI(CLSPL)	9351	342.31	6310	345.26
SOCKLATINGA	34628	341.05	0	0.00

* Above 5000Kgs.

DOOARS CTC BATTING ORDER (STAC+CTTA) Sale 14 to 20				
MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
ARYAMAN SPECIAL	6651	355.96	15143	283.58
KARTICK	35122	353.51	36169	364.15
BINAGURI	105592	335.96	137292	287.15
BARADIGHI	71839	331.91	69362	332.99
DIMAGOLD	6336	328.36	0	0.00
GHATIA ROYAL	20488	322.75	222	380.00
RYDAK	81892	320.83	56536	343.63
BHATKAWA	23726	315.20	32935	314.04
ARYAMAN	7906	314.20	0	0.00
NEPUCHAPUR	67357	307.89	65566	285.67
ZURRANTEE	28215	307.33	42544	281.14
MAINAKROYAALE	15593	306.91	6539	324.54
DALGAON	113964	303.84	94882	309.38
HOPE	57846	303.59	89253	294.92
MORAGHAT	72229	302.26	123134	287.98
CENTRAL DOOARS	38378	302.08	38630	272.36
MECHPARA	20773	297.86	38465	277.03
KUMARGRAM	40912	295.65	62933	297.01
JITI	94288	295.34	148689	285.40
SANKOS	47144	292.30	78083	287.34
MEENGLAS	109438	290.56	99891	286.38
DIANA (RAMBARI)	27892	290.32	48313	296.91
RHEABARI	60742	287.73	41870	276.47
GANDRAPARA	156426	287.66	147701	292.85
HULDIBARIROYAL	76920	287.46	0	0.00

* Above 5000Kgs.

ASSAM ORTHODOX BATTING ORDER (GTAC+CTTA) Sale 14 to 20				
MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
DEJOO	28797	394.09	44181	341.16
HARMUTTY	35090	379.66	24660	349.23
DIROK	7042	376.81	0	0.00
OAKLANDS	7355	375.58	0	0.00
SINGLIJAN	14066	368.18	21329	315.39
SESSA 'B'	22296	364.80	31180	317.71
RAIDANG 'D'	53619	364.68	129490	296.46
DIKOM	69584	363.57	39981	310.57
PENGAREE	69654	361.33	77315	319.13
BORPATRA	47772	360.30	16452	322.14
METHONI	8953	358.06	18478	319.25
DHELAKHAT	55036	356.62	40601	316.27
MUTTUCK	32365	356.43	36191	312.47
MOKALBARI EAST	62860	355.37	37545	314.56
BORDUBI	97060	353.55	175487	273.57
MOHUNBAREE	11036	353.46	13927	317.42
JOONKTOLLEE	40010	351.20	888	349.60
NAMSANG	38997	350.33	28314	289.59
MADHUTING	77740	349.80	51760	325.18
NAMDANG	26168	346.31	0	0.00
LANGHARJAN	56617	346.23	0	0.00
KOILAMARI	112573	342.88	160329	293.87
DAISAJAN	53178	342.15	37413	291.21
BEESAKOPIE	51627	340.95	113801	284.39
NOKHROY	100510	334.95	33653	321.45

* Above 5000Kgs.

DARJEELING BATTING ORDER Sale 14 to 20

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
TEESTA VALLEY	1352	1769.05	2937	924.13
GIELLE	1512	1649.88	2978	959.77
BARNESBEG (ORGANIC)	719	1318.12	1910	819.66
CASTLETON	2051	1305.79	5428	839.58
MIM	783	1227.13	266	1024.96
THURBO	4132	1017.04	5098	711.54
MARGARET'S HOPE	3672	978.15	3866	918.44
PUTTABONG	591	895.00	4522	984.20
GLENBURN	3982	803.23	3660	748.57
ROHINI	1833	732.15	1230	622.96
BADAMTAM (ORGANIC)	2351	702.61	1867	921.97
HILLTON	2752	571.47	1195	392.94
UPPER FAGU	6371	445.14	6026	441.24
SNOWVIEW	2655	391.80	0	0.00
GYA/MILLIKTHONG	533	372.19	606	948.00
MISSION HILL	962	339.91	3737	369.32

* Above 500 Kgs.

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