



J THOMAS & COMPANY PRIVATE LIMITED

KOLKATA MARKET SYNOPSIS - SALE 29 (2025 - 26)

CTC
Market Report
• Good demand
• Top liquoring sorts around last levels. Medium and plainer category tended easier and saw some withdrawals.
• Plainer Dooars tended lower and saw withdrawals.
Buying Analysis
• Western India: Good support on the better teas
• Hindustan Unilever: Quiet West Bengal Manufacturing: Selective
• Exporters: Fair enquiry Other Internal/Local: Operated
Orthodox
Market Report
• Strong demand
• Few tippy teas on offer sold readily. Well made Whole Leaf and Brokens firm around last. Remainder irregular around last.
• Fannings and Cleaner Secondaries sold at firm rates.
Buying Analysis
• Middle East : Active
• CIS: Good Support

DUST
Market Report
• Good demand
• All sorts irregularly easier.
Buying Analysis
• Hindustan Unilever: Mainstay
• Western India: Good Support
• West Bengal Manufacturing: Selective
Darjeeling
Market Report
• Good demand
• Whole leaf grades sold well, with the high grown sold between Rs 700-1100, with some teas appreciated with quality. Remaining teas sold well between Rs 500-600/- . Brokens met with limited enquiry while well made blackish fannings saw useful demand.
• Exporters , Hindustan Unilever and Teojan: Active Local/Internal: Good support

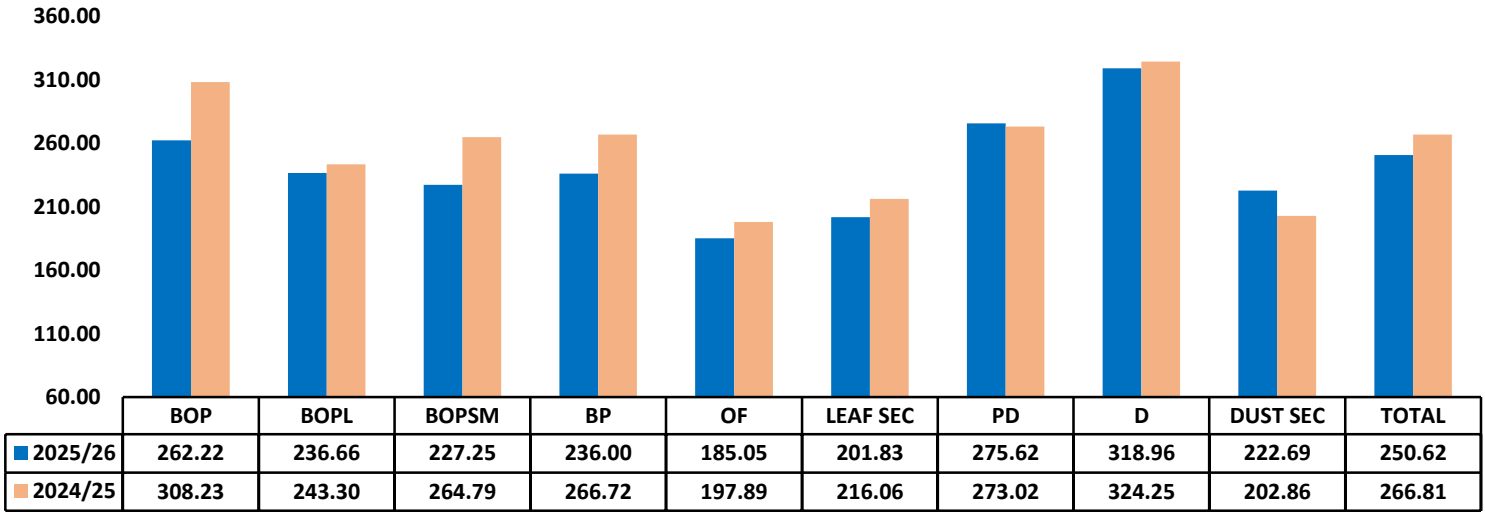
AUCTION AVERAGES

	2025/26			2024/25			UP TO SALE 29		
	SALE 29	SALE 28	+/-	SALE 29	SALE 28	+/-	2025/26	2024/25	2023/24
CTC LEAF	246.48	247.27	-0.79	287.07	288.29	-1.22	236.60	262.99	220.06
DUST	273.20	276.00	-2.80	297.21	305.23	-8.03	276.35	272.96	224.13
TOTAL	257.57	258.21	-0.64	291.52	295.20	-3.68	250.62	266.81	221.32
ORTHODOX	301.93	290.07	11.87	313.80	306.87	6.93	305.68	300.90	223.99
DARJEELING	614.94	555.83	59.11	548.93	541.84	7.09	550.10	462.60	452.36
ALL TEAS	278.42	271.93	6.50	298.78	300.30	-1.51	273.30	280.42	224.72

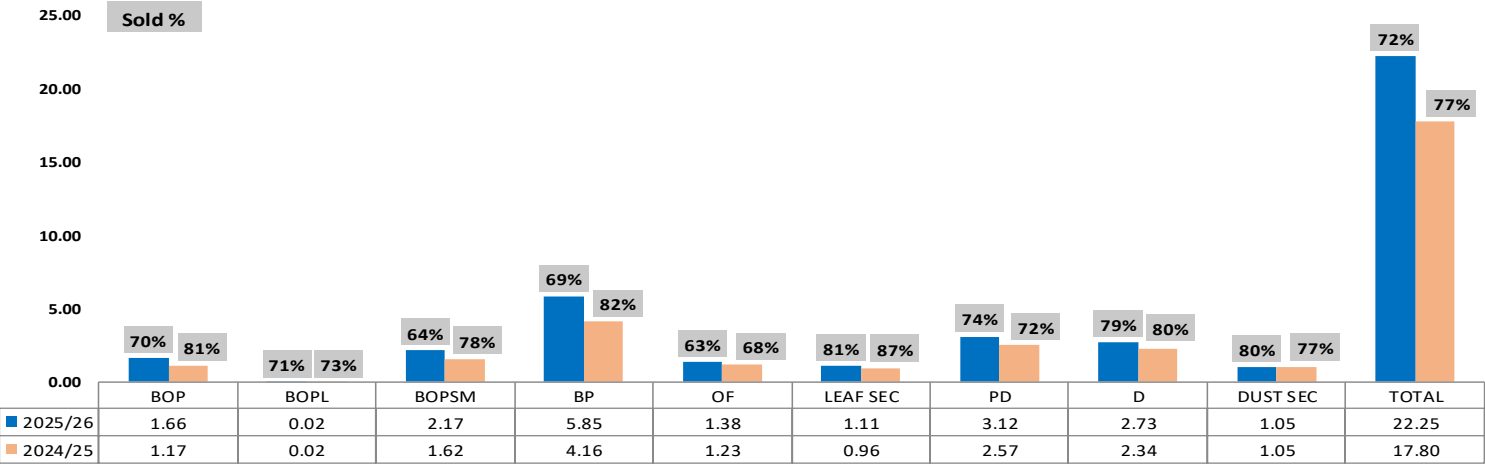
KOLKATA AUCTION AVERAGES

SALE		25	26	27	28	29	30
CTC LEAF	2025/26	252.73	258.18	263.82	247.27	246.48	
	2024/25	304.69	291.72	289.77	288.29	287.07	276.27
DUST	2025/26	292.66	284.98	281.39	276.00	273.20	
	2024/25	295.79	297.98	303.47	305.23	297.21	283.38
TOTAL	2025/26	265.83	267.52	270.39	258.21	257.57	
	2024/25	300.57	294.57	295.37	295.20	291.52	279.12
ORTHODOX	2025/26	269.40	290.64	296.42	290.07	301.93	
	2024/25	312.15	313.18	308.37	306.87	313.80	317.12
DARJEELING	2025/26	418.34	492.74	478.09	555.83	614.94	
	2024/25	318.80	368.76	467.68	541.84	548.93	686.97

Kolkata Gradewise Averages CTC Leaf / Dust Upto Sale 29



Kolkata Gradewise Sold Quantity (M. Kgs) CTC Leaf / Dust Upto Sale 29



KOLKATA GRADEWISE ORTHODOX AVARAGES UPTO SALE 29

GRADE	2025 - 25		2024 - 25		GRADE	2025 - 25		2024 - 25	
	QTY.	AVG	QTY.	AVG		QTY.	AVG	QTY.	AVG
TGFOP1	557414.4	424.82	415368.6	415.74	GFBOP	839613.4	322.04	719294.9	317.91
TGFOP	1108384.0	385.99	822137.7	377.21	GBOP	1119966.0	294.48	830684.5	300.84
GFOP	711183.3	351.68	509914.2	351.36	BPS	522182.8	366.25	438283.1	323.54
FOP	817399.8	277.28	552093.1	281.11	GBOP1/FBOP1	1257936.8	208.22	806353.0	193.85
FBOP	1649432.6	340.24	1121967.5	322.49	BOPF/GOF/FOF	862687.3	182.58	606616.8	189.02

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	15,00,974	10,00,361	247.66	33%	14,77,934	9,72,377	254.55	34%	1,47,09,363	1,00,58,876	239.17	32%
FANNINGS	5,46,659	2,88,144	257.71	47%	5,16,419	3,54,785	247.99	31%	47,24,671	32,34,314	240.54	32%
LEAF SEC.	1,70,476	1,30,840	212.72	23%	1,84,269	1,48,110	197.77	20%	13,65,654	11,11,255	201.83	19%
LEAF TOTAL	22,18,108.7	14,19,344.6	246.48	36%	21,78,621.7	14,75,272.4	247.27	32%	2,07,99,688.3	1,44,04,444.8	236.60	31%
DUST	11,51,831	8,58,743	281.92	25%	10,28,580	7,58,352	285.27	26%	88,17,411	68,00,521	284.63	23%
DUST SEC.	1,94,395	1,48,637	222.84	24%	1,92,134	1,48,825	228.76	23%	13,18,445	10,49,300	222.69	20%
DUST TOTAL	13,46,226.5	10,07,380.4	273.20	25%	12,20,714.4	9,07,177.3	276.00	26%	1,01,35,856.1	78,49,820.3	276.35	23%
TOTAL	35,64,335.2	24,26,725.0	257.57	32%	33,99,336.1	23,82,449.7	258.21	30%	3,09,35,544.4	2,22,54,265.1	250.62	28%

OFFER / SOLD QUANTITY & AVERAGE PRICE ORTHODOX												
WHOLE LEAF	7,57,280	6,52,127	337.29	14%	6,67,881	5,44,951	317.19	18%	63,86,435	53,88,183	340.32	16%
BROKENS	7,35,369	6,29,195	318.50	14%	6,34,706	5,05,385	310.78	20%	59,96,430	48,11,649	328.12	20%
FANNINGS	1,24,288	1,15,123	173.62	7%	1,11,249	97,076	176.28	13%	11,34,059	9,36,894	181.86	17%
SECONDARY	2,12,187	1,98,180	207.54	7%	1,81,133	1,63,029	202.99	10%	19,18,146	18,15,516	207.31	5%
ORTH. TOTAL	18,29,123.6	15,94,624.2	301.93	13%	15,94,968.7	13,10,440.2	290.07	18%	1,54,35,070.8	1,29,52,242.0	305.68	16%

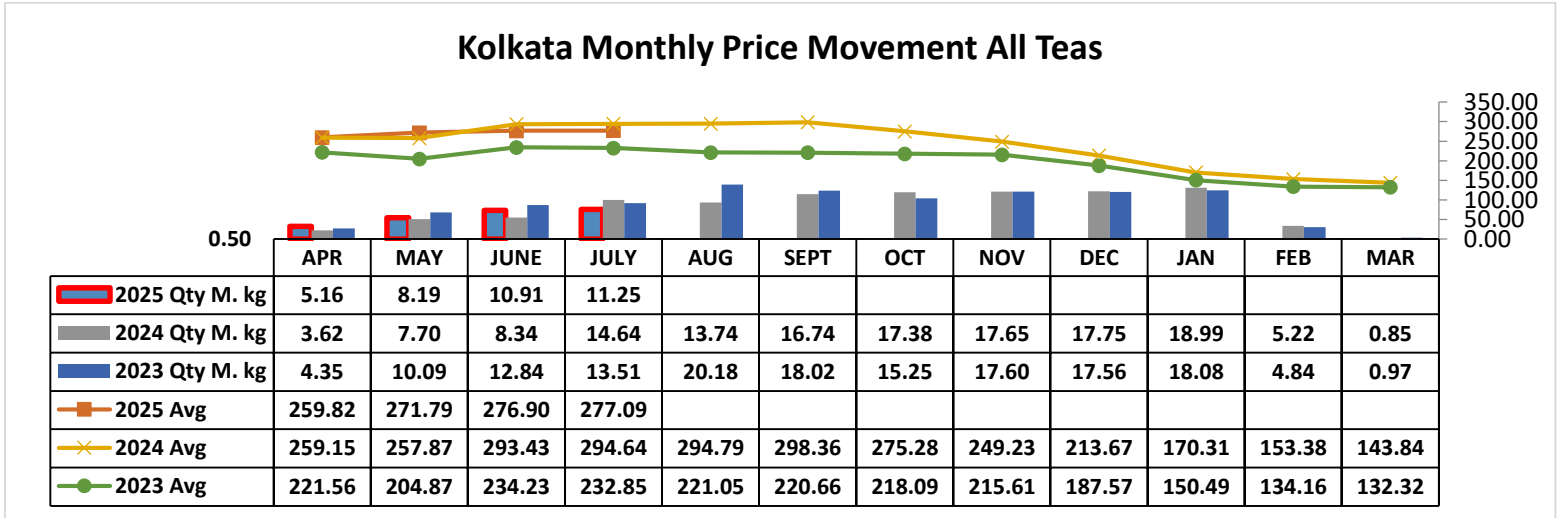
OFFER / SOLD QUANTITY & AVERAGE PRICE DARJEELING												
WHOLE LEAF	34,066	27,723	760.78	19%	23,251	16,663	812.61	28%	2,45,782	1,58,678	769.90	35%
BROKENS	9,275	4,193	260.76	55%	9,495	5,530	292.23	42%	1,06,706	73,535	351.57	31%
FANNINGS	14,098	7,029	251.05	50%	16,926	9,167	248.10	46%	1,44,196	75,998	283.26	47%
DARJ. TOTAL	57,439.5	38,944.8	614.94	32%	49,672.0	31,359.0	555.83	37%	4,96,684.8	3,08,210.4	550.10	38%

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	2218108.7	1419344.6	246.48	36%	2178621.7	1475272.4	247.27	32%	20799688.3	14404444.8	236.60	31%
2024-25	1464109.7	1189099.5	287.07	19%	1372447.9	1150138.1	288.29	16%	13985899.2	10973761.6	262.99	22%
DUST	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	1346226.5	1007380.4	273.20	25%	1220714.4	907177.3	276.00	26%	10135856.1	7849820.3	276.35	23%
2024-25	1133233.7	930258.6	297.21	18%	1013005.7	792630.4	305.23	22%	8990320.3	6824705.0	272.96	24%
ORTHODOX	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	1829123.6	1594624.2	301.93	13%	1594968.7	1310440.2	290.07	18%	15435070.8	12952242.0	305.68	16%
2024-25	773460.5	706601.8	313.80	9%	820861.5	706415.7	306.87	14%	10216255.7	9125242.2	300.90	11%
DARJEELING	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	57439.5	38944.8	614.94	32%	49672.0	31359.0	555.83	37%	496684.8	308210.4	550.10	38%
2024-25	42436.1	19140.4	548.93	55%	36542.2	21743.0	541.84	40%	639699.5	304040.1	462.60	52%
TOTAL	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	5450898.3	4060294.0	278.42	26%	5043976.8	3724248.9	271.93	26%	46867300.0	35514717.6	273.30	24%
2024-25	3413240.0	2845100.3	298.78	17%	3242857.2	2670927.2	300.30	18%	33832174.7	27227749.0	280.42	20%

PRICE RANGE										
% OF TEAS SOLD	CTC LEAF					DUST				
	2025/26		UP TO SALE 29			2025/26		UP TO SALE 29		
	SALE 29	SALE 28	2025/26	2024/25	2023/24	SALE 29	SALE 28	2025/26	2024/25	2023/24
BELOW 160	27.62	23.36	26.89	20.01	30.00	8.93	10.93	12.51	15.22	24.04
BETWEEN 160.00-179.99	2.47	5.40	5.04	6.20	7.36	2.53	3.06	3.55	6.17	7.70
BETWEEN 180.00-199.99	5.78	4.99	5.04	5.28	6.70	4.08	4.65	4.36	5.23	6.19
BETWEEN 200.00-219.99	5.51	8.47	6.40	7.03	7.23	8.15	7.12	6.40	6.19	7.74
BETWEEN 220.00-139.99	3.51	4.67	5.14	6.62	7.19	5.73	3.94	4.41	5.40	7.51
BETWEEN 240.00-259.99	4.20	6.06	7.64	7.04	6.89	6.00	5.88	6.01	6.26	8.97
BETWEEN 260.00-279.99	6.35	7.26	7.75	5.62	7.22	4.89	6.79	6.24	6.24	11.17
ABOVE 280	44.57	39.79	36.11	42.20	27.40	59.68	57.63	56.53	49.30	26.68

PRICE RANGE						PRICE RANGE			
% OF TEAS SOLD	ORTHODOX					% OF TEAS SOLD	DARJEELING		
	2025/26		UP TO SALE 29				2025/26		UP TO SALE 29
	SALE 29	SALE 28	2025/26	2024/25	2023/24		SALE 29	SALE 28	2025/26
BELOW 200	10.46	11.11	11.98	15.08	31.42	BELOW 300.00	18.91	31.21	23.33
BETWEEN 200.00-219.99	8.55	10.26	7.54	3.20	11.75	BETWEEN 301.00-400.99	4.71	8.04	13.24
BETWEEN 220.00-239.99	9.37	10.36	7.03	4.44	18.22	BETWEEN 401.00-500.99	1.69	3.73	9.08
BETWEEN 240.00-259.99	7.54	7.01	6.30	5.42	15.62	BETWEEN 501.00-600.99	13.32	10.73	19.04
BETWEEN 260.00-279.99	6.59	8.32	6.81	6.44	8.01	BETWEEN 601.00-700.99	23.56	10.63	10.88
ABOVE 280	57.50	52.94	60.34	65.43	14.98	ABOVE 701.00	37.81	35.66	24.42

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
30	67213	64535	2149	33435	167332	51619	34705	2264	30443	119031	15594	29830	-115	2992	48301
31	72468	53311	3143	32379	161301	56892	46157	2441	29335	134825	15576	7154	702	3044	26476
32	77891	65399	2928	32768	178986	53188	37634	2231	30029	123082	24703	27765	697	2739	55904
TOTAL	217572	183245	8220	98582	507619	161699	118496	6936	89807	376938	55873	64749	1284	8775	130681



CTTA BUYING (ALL TEAS) FOR THE SALE 29											
	CTC LEAF			DUST					TOTAL		
	SALE 29										
OFFER	22,18,108.7		Kgs	OFFER	13,46,226.5		Kgs	OFFER	35,64,335.2		Kgs
SOLD	14,19,344.6		Kgs	SOLD	10,07,380.4		Kgs	SOLD	24,26,725.0		Kgs
SOLD %	64%			SOLD %	75%			SOLD %	68%		
ZONES	KGS.	AVG.	%		Kgs	AVG	%		Kgs	AVG	%
W.India	4,82,372.4	282.05	34%	HUL	4,26,839.2	294.07	42%	W.India	6,24,554.6	283.46	26%
Local	2,22,623.5	210.32	16%	W.India	1,42,182.2	288.24	14%	HUL	5,53,435.6	284.77	23%
N.India	1,81,732.1	249.93	13%	Others	1,18,190.4	241.70	12%	Others	2,88,488.4	183.97	12%
Others	1,70,298.0	143.90	12%	Packeteers	83,225.8	315.72	8%	Local	2,59,387.2	209.36	11%
HUL	1,26,596.4	253.41	9%	S.India	65,287.9	313.05	6%	N.India	2,27,200.1	242.60	9%
WI.Pack	1,16,498.3	316.25	8%	WI.Pack	57,430.3	192.79	6%	WI.Pack	1,73,928.6	275.48	7%
Exports	49,946.6	207.98	4%	N.India	45,468.0	213.29	5%	S.India	95,895.2	295.78	4%
S.India	30,607.3	258.94	2%	Local	36,763.7	203.57	4%	Packeteers	84,714.8	316.40	3%
NI.Pack	26,429.7	313.04	2%	Exports	30,597.1	162.55	3%	Exports	80,543.7	190.72	3%
TCPL	10,751.3	93.15	1%	NI.Pack	835.8	180.00	0%	NI.Pack	27,265.5	308.96	1%
Packeteers	1,489.0	354.83	0%	TCPL	560.0	95.00	0%	TCPL	11,311.3	93.24	0%
Grand Total	14,19,344.6	246.48	100%	TOTAL	10,07,380.4	273.20	100%	TOTAL	24,26,725.0	257.57	100%

	ORTHODOX			DARJEELING			
	SALE 29						
OFFER	18,29,123.6		Kgs	OFFER	57,439.5		Kgs
SOLD	15,94,624.2		Kgs	SOLD	38,944.8		Kgs
SOLD %	87%			SOLD %	68%		
ZONE	Kgs	AVG	%		Kgs	AVG	%
Others	3,95,394.7	306.68	25%	Exports	11,917.5	628.81	31%
Middle East	2,68,514.5	268.08	17%	Local	9,497.0	439.40	24%
Other Exports	2,45,985.6	318.50	15%	Others	6,602.3	698.21	17%
Local	1,70,375.1	319.08	11%	HUL	6,441.0	694.84	17%
Exports	1,46,284.4	375.06	9%	Other Exports	3,482.0	778.04	9%
W.India	1,44,457.4	290.64	9%	W.India	576.5	334.24	1%
Domestic☐	1,08,971.5	195.91	7%	C.India	219.0	483.56	1%
N.India	71,741.5	310.88	4%	Domestic☐	209.5	901.87	1%
CIS	28,191.6	354.41	2%				
HUL	8,414.2	268.62	1%				
CONTINENT	5,041.3	457.07	0%				
TCPL	1,252.4	368.57	0%				
TOTAL	15,94,624.2	301.93	100%	TOTAL	38,944.8	614.94	100%

ASSAM CTC BATTING ORDER (GTAC+CTTA) Sale 14 to 29

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
HOOKHMOL	95490	531.03	78214	543.32
GATOONGA	63362	482.03	137545	545.10
DECKIAJULI	89606	459.78	92634	431.72
BEHUBOR	24501	459.39	7722	495.65
HATIMARA	118525	445.83	97182	477.36
MOKRUNG	33565	443.43	82813	515.29
HALMARI	218781	434.58	171047	469.09
BANAMALIE	42314	424.10	57550	411.01
DOOMUR DULLUNG	100841	414.00	141375	426.35
SALKATHONI	105404	410.42	108456	476.01
HAROOCHARAI	74593	403.29	92429	368.76
DOOLAHAT	138041	400.54	164094	362.25
HIRAJULI	41920	396.03	47892	411.39
KAMARBUND	44957	394.39	53357	404.68
LOHPOHIA	28749	394.08	24878	394.21
KHARIKATIA	114268	388.61	130093	402.35
GELAKEY	82373	386.13	76710	393.85
DOOMNI	180446	379.88	236592	393.98
SILONIBARI	89104	377.07	89235	339.06
KOOMTAI 'B'	223765	376.16	342413	394.45
BORJAN	79261	376.16	80591	360.12
SOCKETING	101670	372.75	112682	363.43
BORSILLAH	134231	367.65	160461	370.40
DUFLATING	70106	366.98	100364	407.99
KHONA	57955	364.63	50770	401.75

* Above 20000Kgs.

DOOARS CTC BATTING ORDER (STAC+CTTA) Sale 14 to 29

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
KARTICK	123068	372.15	85773	382.90
BINAGURI	291788	354.21	303729	309.63
ARYAMAN	33041	336.36	0	0.00
GHATIA ROYAL	86864	335.36	15969	324.08
RYDAK	190256	331.83	151434	345.24
BARADIGHI	155797	330.39	138935	332.63
GULMA	259906	330.23	118808	319.71
NEPUCHAPUR	154824	326.90	144626	312.30
LAKHIPARA	72494	322.73	4510	276.63
JITI	230017	321.46	360331	309.21
BHATKAWA	76787	321.16	91619	320.75
HOPE	116638	320.70	193258	312.21
PAHARGOOMIAH	222895	316.64	164327	304.73
KARALAVALLEYROYAL	85244	313.86	76131	295.23
CHULSA	49380	313.48	109665	337.62
MORAGHAT	218068	311.67	240864	306.83
DALGAON	197370	311.58	190501	326.09
MAINAKROYAALE	39649	309.31	9480	316.09
ZURRANTEE	110742	306.78	99069	291.03
MEENGLAS	299783	304.38	238196	296.61
GOPALPUR	103986	303.60	109932	274.54
CHALOUNI	33954	303.37	162038	309.38
KUMARGRAM	139665	301.68	234640	312.26
SANKOS	218432	298.65	306849	304.78
LEESH RIVER	300452	295.93	200388	306.98

* Above 20000Kgs.

ASSAM ORTHODOX BATTING ORDER (GTAC+CTTA) Sale 14 to 29				
MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
DEJOO	89093	419.12	96198	357.88
HARMUTTY	110511	408.00	99129	391.99
OAKLANDS	43214	374.19	0	0.00
DIKOM	165264	368.58	134933	333.09
SESSA 'B'	151460	365.43	91582	324.60
MOKALBARI EAST	124489	361.88	126381	341.49
BORPATRA	169573	360.83	88175	365.82
MADHUTING	252140	353.29	173980	343.96
DHELAKHAT	177955	350.56	156299	342.46
HATTIALLI	191382	345.94	122600	333.91
LANGHARJAN	218935	344.60	338	375.02
SINGLIJAN	67706	344.58	104268	330.22
METHONI	81329	342.69	111736	346.33
MOHUNBAREE	49097	340.68	53515	319.23
SEAJULI	82902	339.61	105180	309.60
PENGAREE	207398	339.07	186552	346.70
NONAIPARA	120692	335.03	46283	337.18
RAIDANG 'D'	248683	332.71	371944	286.14
JOONKTOLLEE	137263	332.26	16568	330.72
PHILLOBARI	166494	332.20	226995	273.66
MUTTUCK	127228	331.92	157853	330.26
KOOMSONG	359562	331.23	290470	300.50
DAISAJAN	174859	330.08	113531	285.33
PANITOLA	403373	328.12	146606	288.59
NOKHROY	263074	327.50	113481	322.28

* Above 20000Kgs.

DARJEELING BATTING ORDER Sale 14 to 29

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
GIELLE	7097	986.06	7565	856.52
BALASUN	4957	958.90	4792	659.99
TEESTA VALLEY	11378	919.89	11728	818.59
SUNGMA	5274	892.66	6868	734.75
PUTTABONG	6341	832.84	11727	671.49
CASTLETON	16908	740.69	20840	686.23
NAMRING(UPPER)	8235	669.40	6414	687.48
THURBO	29955	648.58	25902	532.22
MARGARET'S HOPE	32773	588.24	22134	544.46
BADAMTAM (ORGANIC)	9708	577.23	7737	537.30
BARNESBEG (ORGANIC)	6269	557.91	4755	651.66
GOPALDHARA	8616	553.04	6942	402.40
MIM	12443	535.40	10449	409.70
SINGBULLI (ORGANIC)	4225	489.61	2338	302.52
GLENBURN	26404	487.94	12215	461.03
ROHINI	12095	476.92	6143	403.55
SELIMBONG	3109	456.93	2020	445.95
NAMRING	5703	436.39	464	701.98
ORANGE VALLEY	3343	432.00	585	337.18
HILLTON	25373	409.84	9105	297.05
UPPER FAGU	28712	383.90	21301	335.67
GYA/MILLIKTHONG	4013	353.71	1098	657.45
NORTH TUKVAR	4350	287.79	3596	252.42
NURBONG	3876	240.61	1885	379.09
SOURENI	4440	200.87	426	224.49

* Above 3000 Kgs.

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