



J THOMAS & COMPANY PRIVATE LIMITED
KOLKATA MARKET SYNOPSIS - SALE 38 (2025 - 26)

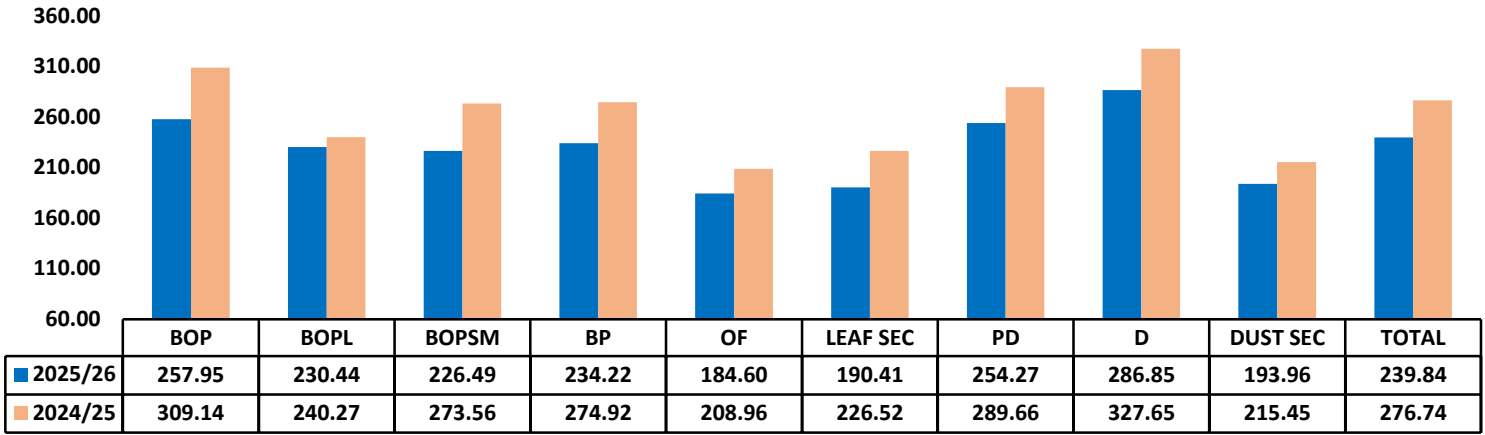
CTC
Market Report
· Good demand
· Liquoring Assams sold readily around last levels.
· Mediums irregularly easier. Few Dooars around last.
Buying Analysis
· Western India: Good support on the better teas
· Hindustan Unilever: Operated Telojan: Operated on the mediums
· Exporters: Some enquiry Other Internal/Local: Fair support
Orthodox
Market Report
· Strong demand
· Nominal quantity of tippy teas on offer readily absorbed Well made Whole Leaf and Broken firm around last.
· Remainder Whole Leaf and Broken irregular around last. Fannings and Secondaries sold around last levels.
Buying Analysis
· Middle East : Active
· CIS: Operated
· Hindustan Unilever/TCPL: Selective

DUST
Market Report
· Good demand
· All sorts irregularly easier.
Buying Analysis
· Hindustan Unilever: Active
· TCPL: Active
· Western India: Good Support
Darjeeling
Market Report
· Good demand
· Nominal quantity of higher elevation Wholeleaf sold at Rs 600 and above. Lower elevation Wholeleaf sold at Rs 400 and above. Some demand witnessed on greenish Broken and Fannings from local counters/buyers .
· Exporters: Some Enquiry Hindustan Unilever: Operated TCPL: Active Local/Internal: Good Support

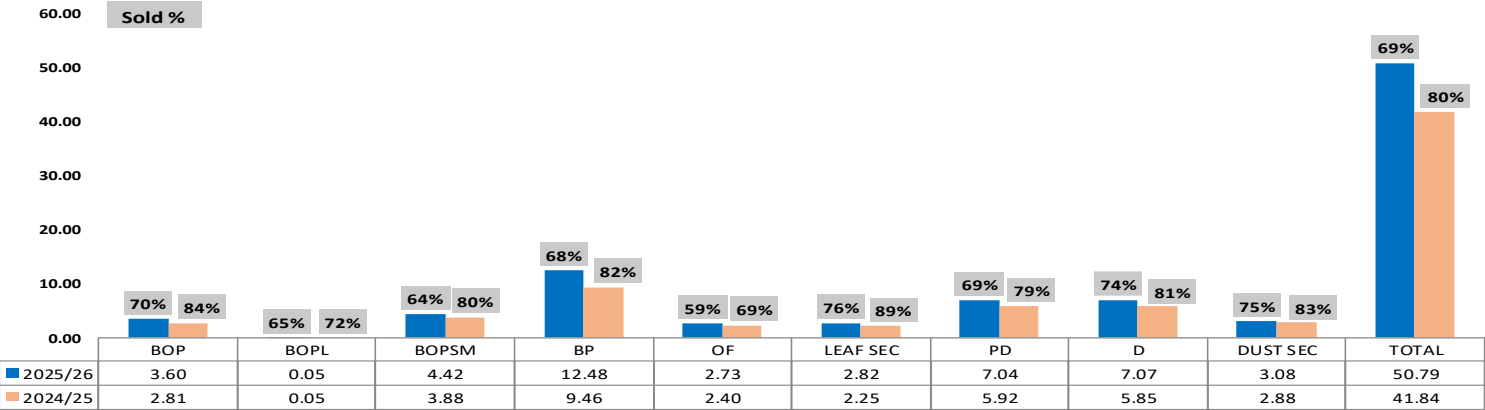
AUCTION AVERAGES									
	2025/26			2024/25			UP TO SALE 38		
	SALE 38	SALE 37	+/-	SALE 38	SALE 37	+/-	2025/26	2024/25	2023/24
CTC LEAF	222.11	223.65	-1.54	276.49	284.45	-7.96	232.23	271.32	218.60
DUST	222.51	222.00	0.51	302.64	313.03	-10.39	252.21	284.94	220.08
TOTAL	222.28	222.99	-0.71	286.62	296.72	-10.10	239.84	276.74	219.08
ORTHODOX	279.74	283.04	-3.31	344.58	332.81	11.77	302.15	312.21	225.75
DARJEELING	430.09	475.27	-45.18	427.27	424.79	2.49	524.38	476.81	415.71
ALL TEAS	239.79	240.11	-0.32	301.48	307.28	-5.81	262.82	289.04	223.14

KOLKATA AUCTION AVERAGES							
SALE		34	35	36	37	38	39
CTC LEAF	2025/26	223.86	218.49	227.82	223.65	222.11	
	2024/25	273.66	283.94	280.34	284.45	276.49	266.16
DUST	2025/26	227.85	223.95	221.07	222.00	222.51	
	2024/25	292.36	295.74	294.51	313.03	302.64	296.39
TOTAL	2025/26	225.51	220.75	224.99	222.99	222.28	
	2024/25	281.30	288.89	286.32	296.72	286.62	277.54
ORTHODOX	2025/26	301.33	287.87	279.41	283.04	279.74	
	2024/25	327.25	334.41	331.50	332.81	344.58	327.81
DARJEELING	2025/26	454.51	412.58	437.33	475.27	430.09	
	2024/25	527.27	463.30	482.04	424.79	427.27	407.83

Kolkata Gradewise Averages CTC Leaf / Dust Upto Sale 38



Kolkata Gradewise Sold Quantity (M. Kgs) CTC Leaf / Dust Upto Sale 38



KOLKATA GRADEWISE ORTHODOX AVARAGES UPTO SALE 38

GRADE	2025 - 25		2024 - 25		GRADE	2025 - 25		2024 - 25	
	QTY.	AVG	QTY.	AVG		QTY.	AVG	QTY.	AVG
TGFOP1	1182929.1	415.49	826071.0	438.22	GFBOP	1626858.4	317.80	1284984.0	325.69
TGFOP	2276719.1	377.67	1478218.6	393.16	GBOP	2263571.6	295.60	1489035.8	311.54
GFOP	1397362.4	341.69	869938.4	363.47	BPS	1083059.8	359.42	777591.5	333.94
FOP	1619812.1	269.78	1004755.7	281.54	GBOP1/FBOP1	2324286.2	210.63	1541667.4	200.63
FBOP	3274986.4	335.24	2026715.1	334.75	BOPF/GOF/FOF	1739679.0	180.86	1129289.0	199.11

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	19,69,863	13,68,205	231.25	31%	19,81,433	15,22,138	231.13	23%	3,18,01,683	2,14,34,426	236.59	33%
FANNINGS	7,29,958	5,08,248	221.79	30%	6,69,177	4,13,096	222.95	38%	1,13,38,759	71,82,254	235.63	37%
LEAF SEC.	3,29,661	2,21,845	166.48	33%	3,02,357	2,12,150	171.36	30%	37,15,187	28,21,040	190.41	24%
LEAF TOTAL	30,29,481.6	20,98,298.1	222.11	31%	29,52,966.2	21,47,384.3	223.65	27%	4,68,55,628.9	3,14,37,719.7	232.23	33%
DUST	16,11,348	12,45,252	234.96	23%	16,33,975	11,89,194	233.44	27%	2,24,04,326	1,62,74,751	263.23	27%
DUST SEC.	3,64,479	2,65,349	164.10	27%	3,84,667	2,48,457	167.27	35%	41,18,211	30,78,584	193.96	25%
DUST TOTAL	19,75,827.2	15,10,600.9	222.51	24%	20,18,642.3	14,37,651.0	222.00	29%	2,65,22,536.5	1,93,53,335.5	252.21	27%
TOTAL	50,05,308.8	36,08,899.0	222.28	28%	49,71,608.5	35,85,035.3	222.99	28%	7,33,78,165.4	5,07,91,055.2	239.84	31%

OFFER / SOLD QUANTITY & AVERAGE PRICE ORTHODOX												
WHOLE LEAF	7,09,185	6,11,169	298.35	14%	6,28,139	5,39,430	305.05	14%	1,26,29,939	1,08,43,019	331.98	14%
BROKENS	6,23,467	5,58,034	302.75	10%	5,09,344	4,55,986	310.65	10%	1,13,44,965	96,46,715	324.75	15%
FANNINGS	1,33,555	1,17,749	175.40	12%	1,07,894	96,774	176.91	10%	21,73,028	18,78,241	179.35	14%
SECONDARY	1,97,102	1,82,924	214.51	7%	1,98,616	1,86,732	207.08	6%	35,22,891	33,35,354	208.93	5%
ORTH. TOTAL	16,63,309.9	14,69,875.8	279.74	12%	14,43,992.9	12,78,922.2	283.04	11%	2,96,70,823.6	2,57,03,329.6	302.15	13%

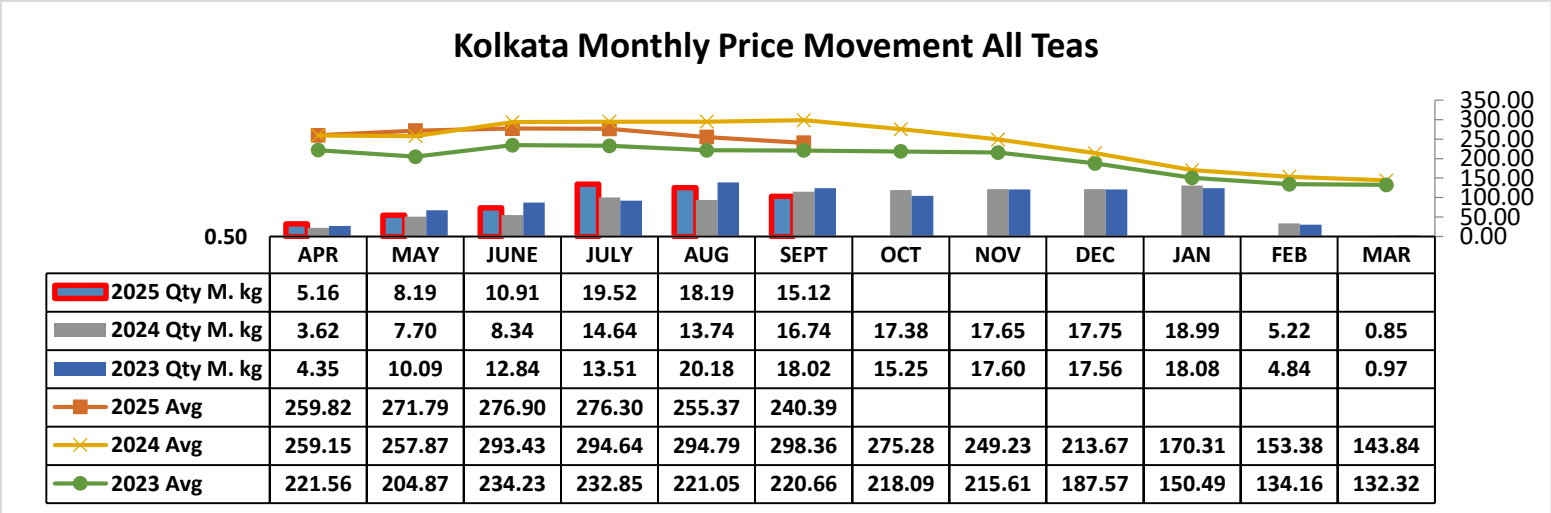
OFFER / SOLD QUANTITY & AVERAGE PRICE DARJEELING												
WHOLE LEAF	21,849	13,379	593.91	39%	22,212	18,043	612.13	19%	5,42,769	3,51,005	692.24	35%
BROKENS	8,207	4,170	258.38	49%	8,300	5,684	256.01	32%	1,90,593	1,28,366	316.16	33%
FANNINGS	10,628	6,019	184.95	43%	4,750	3,707	145.32	22%	2,10,021	1,18,645	253.05	44%
DARJ. TOTAL	40,683.5	23,568.3	430.09	42%	35,261.4	27,433.9	475.27	22%	9,43,382.1	5,98,016.9	524.38	37%

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	3029481.6	2098298.1	222.11	31%	2952966.2	2147384.3	223.65	27%	46855628.9	31437719.7	232.23	33%
2024-25	2536841.6	2073180.0	276.49	18%	1921142.6	1516235.1	284.45	21%	31302323.3	25185322.9	271.32	20%
DUST	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	1975827.2	1510600.9	222.51	24%	2018642.3	1437651.0	222.00	29%	26522536.5	19353335.5	252.21	27%
2024-25	1532533.6	1310521.7	302.64	14%	1278872.6	1140287.2	313.03	11%	20803057.4	16656455.2	284.94	20%
ORTHODOX	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	1663309.9	1469875.8	279.74	12%	1443992.9	1278922.2	283.04	11%	29670823.6	25703329.6	302.15	13%
2024-25	1187041.5	1036853.0	344.58	13%	924257.6	849056.1	332.81	8%	18739550.1	16919904.3	312.21	10%
DARJEELING	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	40683.5	23568.3	430.09	42%	35261.4	27433.9	475.27	22%	943382.1	598016.9	524.38	37%
2024-25	80870.2	44442.2	427.27	45%	76445.9	54454.7	424.79	29%	1172949.3	653275.2	476.81	44%
TOTAL	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	6709302.2	5102343.1	239.79	24%	6450862.8	4891391.4	240.11	24%	103992371.2	77092401.7	262.82	26%
2024-25	5337286.8	4464996.9	301.48	16%	4200718.7	3560033.0	307.28	15%	72017880.1	59414957.6	289.04	17%

PRICE RANGE	CTC LEAF					DUST				
% OF TEAS SOLD	2025/26					UP TO SALE 38				
	2025/26		UP TO SALE 38			2025/26		UP TO SALE 38		
	SALE 38	SALE 37	2025/26	2024/25	2023/24	SALE 38	SALE 37	2025/26	2024/25	2023/24
BELOW 160	21.79	21.03	23.77	13.08	25.86	19.35	17.27	13.94	10.38	22.61
BETWEEN 160.00-179.99	8.23	8.21	6.26	6.43	7.29	6.07	5.12	4.68	4.30	7.52
BETWEEN 180.00-199.99	6.55	5.45	5.56	5.97	7.52	4.06	5.11	4.74	4.69	6.65
BETWEEN 200.00-219.99	7.55	7.04	6.55	6.90	10.02	6.84	8.73	6.75	6.61	10.54
BETWEEN 220.00-239.99	10.10	10.89	7.49	7.23	10.21	14.74	14.97	7.69	5.46	10.46
BETWEEN 240.00-259.99	15.32	14.61	10.57	7.52	9.95	21.12	23.54	12.27	6.92	11.73
BETWEEN 260.00-279.99	11.87	12.98	10.02	6.49	8.19	12.64	13.31	11.07	6.50	9.74
ABOVE 280	18.61	19.79	29.77	46.38	20.95	15.18	11.94	38.85	55.14	20.75

PRICE RANGE						PRICE RANGE			
% OF TEAS SOLD	ORTHODOX					% OF TEAS SOLD	DARJEELING		
	2025/26		UP TO SALE 38				2025/26		UP TO SALE 38
	SALE 38	SALE 37	2025/26	2024/25	2023/24		SALE 38	SALE 37	2025/26
BELOW 200	10.97	12.56	10.83	13.54	32.09	BELOW 300.00	34.61	36.36	24.66
BETWEEN 200.00-219.99	7.66	9.37	7.84	3.51	12.29	BETWEEN 301.00-400.99	7.09	2.93	9.54
BETWEEN 220.00-239.99	19.31	16.51	10.01	4.33	16.39	BETWEEN 401.00-500.99	11.13	1.47	8.07
BETWEEN 240.00-259.99	11.13	8.16	7.28	6.00	14.38	BETWEEN 501.00-600.99	20.74	24.86	25.52
BETWEEN 260.00-279.99	5.81	6.02	6.26	6.72	8.38	BETWEEN 601.00-700.99	15.93	21.18	12.78
ABOVE 280	45.12	47.39	57.79	65.90	16.48	ABOVE 701.00	10.49	13.21	19.43

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
39	79283	66551	3139	42277	191250	93175	59954	5306	40639	199074	-13892	6597	-2167	1638	-7824
40	NO SALE				0	94838	51941	2815	44142	193736	-94838	-51941	-2815	-44142	-193736
41	78951	66863	3796	42073	191683	NO SALE				0	78951	66863	3796	42073	191683
42	76886	68188	2115	40258	187447	91710	49668	3562	46765	191705	-14824	18520	-1447	-6507	-4258
TOTAL	235120	201602	9050	124608	570380	279723	161563	11683	131546	584515	-44603	40039	-2633	-6938	-14135



CTTA BUYING (ALL TEAS) FOR THE SALE 38											
	CTC LEAF			DUST					TOTAL		
	SALE 38										
OFFER	30,29,481.6		Kgs	OFFER	19,75,827.2		Kgs	OFFER	50,05,308.8		Kgs
SOLD	20,98,298.1		Kgs	SOLD	15,10,600.9		Kgs	SOLD	36,08,899.0		Kgs
SOLD %	69%			SOLD %	76%			SOLD %	72%		
ZONES	KGS.	AVG.	%		Kgs	AVG	%		Kgs	AVG	%
W.India	6,55,364.3	245.20	31%	HUL	6,84,201.0	224.37	45%	HUL	11,01,254.9	227.16	31%
HUL	4,17,053.9	231.73	20%	W.India	3,67,056.8	228.84	24%	W.India	10,22,421.1	239.32	28%
N.India	2,42,650.0	210.10	12%	TCPL	1,37,276.8	204.37	9%	N.India	3,18,539.0	209.98	9%
Local	2,42,226.3	175.87	12%	N.India	75,889.0	209.60	5%	Local	2,71,611.8	174.45	8%
Exports	1,57,236.3	236.95	7%	Others	63,152.2	237.72	4%	TCPL	2,55,897.2	183.30	7%
Others	1,56,508.7	214.53	7%	WI.Pack	50,879.7	226.79	3%	Others	2,19,660.9	221.19	6%
TCPL	1,18,620.4	158.92	6%	S.India	37,968.5	221.52	3%	Exports	1,89,244.8	227.69	5%
WI.Pack	90,376.3	239.79	4%	Exports	32,008.5	182.19	2%	WI.Pack	1,41,256.0	235.11	4%
Packeteers	12,989.2	211.58	1%	Local	29,385.5	162.72	2%	S.India	43,131.1	218.40	1%
S.India	5,162.6	195.52	0%	Packeteers	19,593.5	300.76	1%	Packeteers	32,582.7	265.21	1%
NI.Pack	110.1	136.00	0%	NI.Pack	13,189.4	241.99	1%	NI.Pack	13,299.5	241.12	0%
Grand Total	20,98,298.1	222.11	100%	TOTAL	15,10,600.9	222.51	100%	TOTAL	36,08,899.0	222.28	100%

	ORTHODOX			DARJEELING			
	SALE 38						
OFFER	16,63,309.9		Kgs	OFFER	40,683.5		Kgs
SOLD	14,69,875.8		Kgs	SOLD	23,568.3		Kgs
SOLD %	88%			SOLD %	58%		
ZONE	Kgs	AVG	%		Kgs	AVG	%
Local	4,72,927.2	296.80	32%	Local	7,943.6	332.78	34%
Others	2,70,743.7	271.72	18%	Exports	5,010.9	361.38	21%
Middle East	2,69,472.8	264.07	18%	TCPL	3,262.8	563.55	14%
N.India	2,04,602.5	291.50	14%	HUL	2,749.6	627.14	12%
Exports	78,884.5	309.50	5%	Others	2,376.4	508.59	10%
Domestic	56,665.3	156.70	4%	Domestic	1,701.6	389.92	7%
W.India	38,602.7	326.44	3%	W.India	336.8	466.29	1%
HUL	27,247.9	253.31	2%	Other Exports	186.6	482.00	1%
Other Exports	25,208.5	238.90	2%				
TCPL	18,019.8	272.21	1%				
CIS	7,500.9	363.20	1%				
TOTAL	14,69,875.8	279.74	100%	TOTAL	23,568.3	430.09	100%

ASSAM CTC BATTING ORDER (GTAC+CTTA) Sale 14 to 38

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
HOOKHMOL	193797	505.33	150961	509.59
GATOONGA	193580	445.55	269527	527.54
HALMARI	435515	425.78	383184	437.80
HATIMARA	242781	423.74	178314	457.26
MOKRUNG	93498	412.46	191532	487.95
DECKIAJULI	267157	401.15	218154	391.41
SALKATHONI	232915	386.96	225299	443.91
BANAMALIE	90284	380.54	101530	404.33
DOOLAHAT	297434	373.31	327190	359.12
DOOMUR DULLUNG	248001	363.71	376268	409.76
BORJAN	239686	363.05	212530	382.00
KHARIKATIA	268159	361.13	272529	389.30
KAMARBUND	131377	359.48	129719	386.06
HIRAJULI	80329	359.11	114080	380.52
HAJUA	221163	352.47	331008	400.45
GELAKEY	164848	348.20	133413	379.00
KOOMTAI 'B'	827157	347.31	967896	382.31
DOOMNI	493086	346.96	534325	371.35
DUFLATING	231560	345.61	253646	388.72
LOHPOHIA	69859	341.57	97507	367.50
GHILLIDARY	106500	341.36	148681	391.41
NAHORHABI	61956	338.86	0	0.00
DEHA	197695	334.26	185810	374.67
KHONA	173253	333.91	139156	373.03
DEOHALL	425344	333.23	370081	339.69

* Above 50000Kgs.

DOOARS CTC BATTING ORDER (STAC+CTTA) Sale 14 to 38

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
KARTICK	284109	341.28	154552	360.50
BINAGURI	658685	326.41	568556	313.20
NEPUCHAPUR	229488	315.08	263923	306.34
JITI	438618	314.19	550108	303.27
ARYAMAN	86017	310.23	0	0.00
HOPE	238035	306.91	268384	306.49
RYDAK	442645	306.08	370890	324.76
BHATKAWA	140590	303.91	127297	313.39
GHATIA ROYAL	214082	301.62	78245	309.22
LAKHIPARA	159352	298.82	20352	253.86
KARALAVALLEYROYAL	192278	297.49	184173	291.98
CHULSA	71877	296.43	187002	333.10
GULMA	494474	295.78	246546	326.74
MORAGHAT	406661	294.41	516833	302.66
PAHARGOOMIAH	388929	294.08	313183	297.51
MAINAKROYAALE	68774	293.99	55462	288.09
KUMARGRAM	263336	293.76	435655	298.53
BARADIGHI	364910	290.65	321019	314.98
ZURRANTEE	209461	284.90	174732	283.17
LEESH RIVER	533547	284.50	327445	294.34
DALGAON	425964	283.50	381994	315.10
GOPALPUR	244273	283.42	235488	277.57
SANKOS	408236	281.63	623184	293.11
MEENGLAS	503786	279.31	445143	288.27
GANDRAPARA	479269	277.31	448588	300.28

* Above 50000Kgs.

ASSAM ORTHODOX BATTING ORDER (GTAC+CTTA) Sale 14 to 38

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
DEJOO	203748	407.64	198699	395.65
HARMUTTY	277261	397.61	202841	403.71
OAKLANDS	77491	382.34	15582	402.62
MOKALBARI EAST	234933	371.07	221859	380.60
BORPATRA	331924	360.29	183938	377.54
DIKOM	307778	355.83	281724	348.12
SESSA 'B'	327970	352.26	171602	344.89
HATTIALLI	397781	344.73	239667	337.40
NONAIPARA	204878	344.25	106779	363.50
DHELAKHAT	332144	343.32	297980	354.05
SINGLIJAN	198711	341.71	196285	337.04
LANGHARJAN	254922	341.10	338	375.02
MADHUTING	611360	339.99	174728	343.80
RAIDANG 'D'	509601	338.04	615448	300.01
KOOMSONG	602551	337.56	484940	309.86
PENGAREE	358980	336.67	343138	358.66
PHILLOBARI	361444	335.45	306327	286.32
MOHUNBAREE	109409	335.33	86875	331.46
METHONI	268027	333.21	254437	358.52
JOONKTOLLEE	250071	327.44	44509	336.54
GREENWOOD	55687	327.36	10948	450.99
DAISAJAN	349428	327.21	207105	294.00
MUTTUCK	284582	325.74	276199	336.92
GINGIA	201480	324.65	256348	315.22
BORDUBI	722883	320.66	701242	285.57

* Above 50000Kgs.

DARJEELING BATTING ORDER Sale 14 to 38

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
BALASUN	11870	746.24	10521	666.69
CASTLETON	30936	742.97	33387	751.26
TEESTA VALLEY	38453	695.71	39624	618.45
SUNGMA	13162	695.30	22463	633.84
GIELLE	29688	681.10	26249	638.48
THURBO	46454	624.40	41806	626.21
MARGARET'S HOPE	45946	621.49	34750	631.85
PUTTABONG	19616	595.08	29346	621.99
NAMRING(UPPER)	25333	562.89	27417	457.87
BADAMTAM (ORGANIC)	16817	558.66	14925	567.20
BARNESBEG (ORGANIC)	8646	526.04	7685	627.97
SINGBULLI (ORGANIC)	10242	506.06	7257	502.76
NAMRING	9267	501.09	7076	344.23
GOPALDHARA	21382	495.99	18188	449.59
GLENBURN	50272	455.65	32332	479.00
GYA/MILLIKTHONG	8208	448.82	4029	535.65
ROHINI	28947	444.68	20342	420.85
MIM	31319	436.93	20450	369.97
HILLTON	39985	413.26	33229	348.29
UPPER FAGU	48768	357.63	44152	350.29
NORTH TUKVAR	9174	255.78	12657	266.88
SOURENI	6642	213.74	2641	237.02

* Above 5000 Kgs.

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