



J THOMAS & COMPANY PRIVATE LIMITED
KOLKATA MARKET SYNOPSIS - SALE 48 (2025 - 26)

CTC	
Market Report	
· Good demand	
· Liquoring Assams irregular around last. Remainder browner sorts tended easier.	
· Medium and plainer Dooars followed similar trend.	
Buying Analysis	
· Western India: Supported the better teas	
· Hindustan Tea Exports : Active Telojian: Operated	
· Exporters: Fair support Other Internal/Local: Some enquiry	
Orthodox	
Market Report	
· Strong demand	
· Well made Whole Leaf and Brokens irregular around last. Remainder Whole Leaf and Brokens tended irregular and at times lower following quality.	
· Cleaner Secondaries irregular around last levels. Remainder browner stalkier varieties tended lower and saw some withdrawals.	
Buying Analysis	
· Middle East : Active	
· CIS: Good Support	
· Hindustan Unilever: Selective	

DUST	
Market Report	
· Good demand	
· Cleaner, blacker liquoring Assams irregular.	
· Browner sorts tended easier.	
Buying Analysis	
· Hindustan Tea Exports : Active	
· Telojian: Operated	
· Western India: Selective	
Darjeeling	
Market Report	
· Fair demand	
· Greenish sorts met with good demand. Blackish teas met with resistance and faced outlots with whole leaf grades receiving bids of sub Rs 500/-.	
· Local/Internal: Active on greenish sorts Exporters- Selective	
Major Blenders: Did not operate	

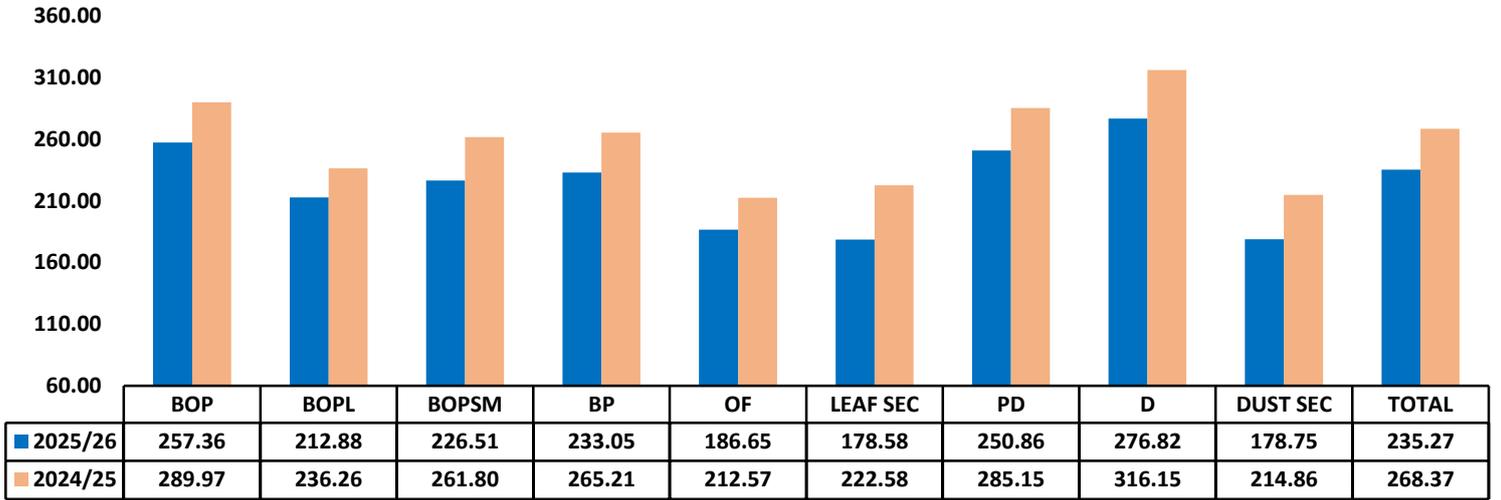
AUCTION AVERAGES

	2025/26			2024/25			UP TO SALE 48		
	SALE 48	SALE 47	+/-	SALE 48	SALE 47	+/-	2025/26	2024/25	2023/24
CTC LEAF	212.52	217.45	-4.94	212.41	222.66	-10.25	229.69	261.78	217.21
DUST	224.89	231.48	-6.60	241.92	250.85	-8.94	243.93	278.65	216.35
TOTAL	217.33	223.39	-6.05	223.08	233.07	-9.99	235.27	268.37	216.93
ORTHODOX	267.56	280.47	-12.91	270.88	277.89	-7.02	296.54	305.71	225.88
DARJEELING	300.00	298.18	1.82	407.31	313.80	93.50	477.99	434.79	362.38
ALL TEAS	231.57	238.29	-6.72	233.88	244.13	-10.26	255.67	279.61	221.16

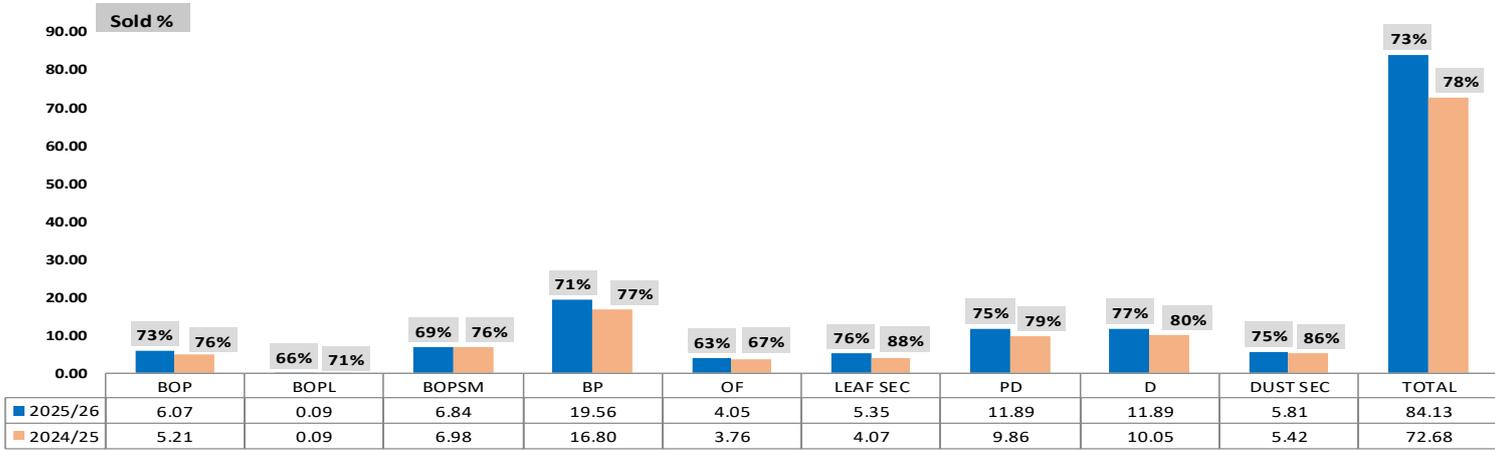
KOLKATA AUCTION AVERAGES

SALE		44	45	46	47	48	49
CTC LEAF	2025/26	225.60	232.59	221.76	217.45	212.52	
	2024/25	255.38	252.49	243.85	222.66	212.41	203.19
DUST	2025/26	235.05	236.61	225.04	231.48	224.89	
	2024/25	271.13	264.17	262.05	250.85	241.92	238.87
TOTAL	2025/26	229.40	234.20	223.01	223.39	217.33	
	2024/25	262.14	256.86	250.69	233.07	223.08	216.57
ORTHODOX	2025/26	291.52	294.22	285.91	280.47	267.56	
	2024/25	284.08	286.62	283.91	277.89	270.88	265.85
DARJEELING	2025/26	328.68	379.30	307.91	298.18	300.00	
	2024/25	332.68	301.09	330.66	313.80	407.31	305.45

Kolkata Gradewise Averages CTC Leaf / Dust Upto Sale 48



Kolkata Gradewise Sold Quantity (M. Kgs) CTC Leaf / Dust Upto Sale 48



KOLKATA GRADEWISE ORTHODOX AVARAGES UPTO SALE 48

GRADE	2025 - 25		2024 - 25		GRADE	2025 - 25		2024 - 25	
	QTY.	AVG	QTY.	AVG		QTY.	AVG	QTY.	AVG
TGFOP1	1635344.2	409.97	1212116.5	426.95	GFBOP	2175835.4	313.49	1875292.8	316.54
TGFOP	3077761.2	371.59	2161057.5	384.77	GBOP	3189122.5	295.21	2216467.8	304.41
GFOP	1851665.6	336.74	1190685.7	365.61	BPS	1609571.5	357.35	1129947.0	338.47
FOP	2269463.0	266.03	1458868.5	279.87	GBOP1/FBOP1	3668121.3	210.41	2373068.9	195.66
FBOP	4813842.2	332.27	3121381.5	326.36	BOPF/GOF/FOF	2574916.2	181.61	1733929.7	196.36

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	19,78,351	13,83,493	222.10	30%	20,55,502	14,23,210	226.64	31%	4,82,71,339	3,41,51,866	235.80	29%
FANNINGS	7,29,386	5,33,885	227.07	27%	6,79,728	4,68,312	227.65	31%	1,71,01,042	1,16,66,370	235.21	32%
LEAF SEC.	4,87,959	3,64,124	154.78	25%	3,58,673	2,83,653	154.54	21%	70,10,497	53,47,267	178.58	24%
LEAF TOTAL	31,95,695.6	22,81,502.5	212.52	29%	30,93,902.4	21,75,175.4	217.45	30%	7,23,82,878.1	5,11,65,502.6	229.69	29%
DUST	14,55,862	11,63,277	241.47	20%	14,69,704	12,81,642	246.58	13%	3,52,66,178	2,71,48,593	257.89	23%
DUST SEC.	4,42,628	2,92,229	158.86	34%	3,73,379	3,13,764	169.80	16%	77,08,232	58,14,546	178.75	25%
DUST TOTAL	18,98,490.1	14,55,505.7	224.89	23%	18,43,082.6	15,95,406.3	231.48	13%	4,29,74,410.1	3,29,63,139.3	243.93	23%
TOTAL	50,94,185.7	37,37,008.2	217.33	27%	49,36,985.0	37,70,581.7	223.39	24%	11,53,57,288.2	8,41,28,641.9	235.27	27%

OFFER / SOLD QUANTITY & AVERAGE PRICE ORTHODOX												
WHOLE LEAF	6,16,882	4,69,141	299.71	24%	5,70,762	4,68,497	304.97	18%	1,77,23,067	1,52,59,496	324.35	14%
BROKENS	5,79,728	4,99,411	310.24	14%	5,21,790	4,65,274	320.15	11%	1,59,61,752	1,38,04,958	322.41	14%
FANNINGS	1,30,095	1,26,191	175.85	3%	1,16,194	1,10,823	181.31	5%	31,47,500	27,69,448	179.59	12%
SECONDARY	3,78,425	3,36,223	193.74	11%	2,85,062	2,43,300	202.59	15%	55,87,900	51,96,572	208.49	7%
ORTH. TOTAL	17,05,129.4	14,30,966.0	267.56	16%	14,93,808.4	12,87,893.4	280.47	14%	4,24,20,218.4	3,70,30,473.7	296.54	13%

OFFER / SOLD QUANTITY & AVERAGE PRICE DARJEELING												
WHOLE LEAF	24,281	7,419	510.04	69%	18,936	7,996	508.29	58%	7,91,767	5,00,498	657.28	37%
BROKENS	11,061	8,659	253.05	22%	11,319	8,985	235.16	21%	2,97,721	2,08,743	291.85	30%
FANNINGS	12,352	8,678	167.28	30%	15,631	13,714	216.96	12%	3,37,437	2,01,755	225.82	40%
DARJ. TOTAL	47,694.1	24,756.5	300.00	48%	45,885.4	30,694.4	298.18	33%	14,26,924.9	9,10,995.3	477.99	36%

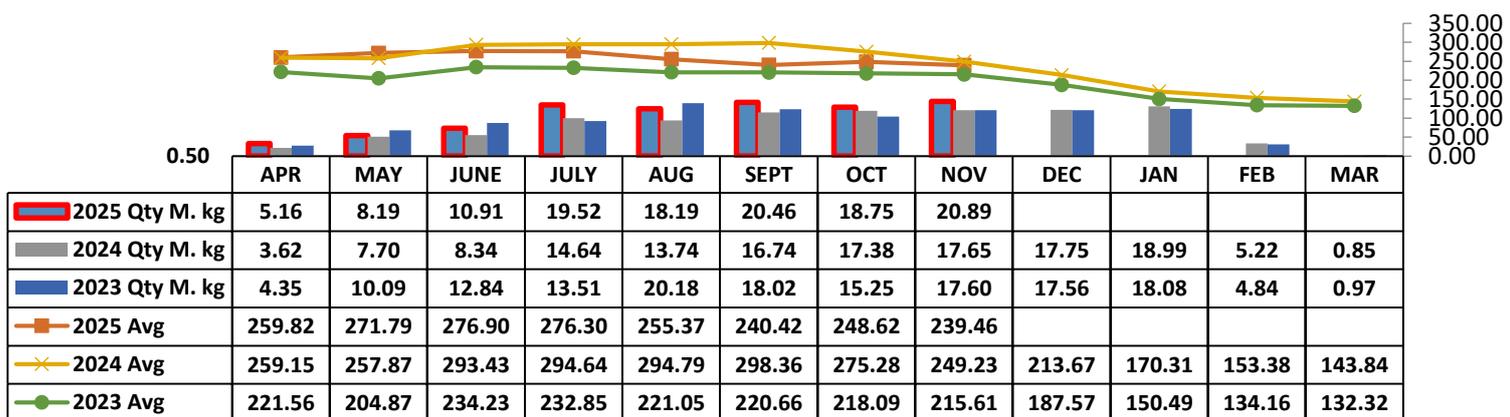
OFFER / SOLD QUANTITY & AVERAGE PRICE												
CTC	THIS SALE				LAST SALE				TO DATE			
	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	3195695.6	2281502.5	212.52	29%	3093902.4	2175175.4	217.45	30%	72382878.1	51165502.6	229.69	29%
2024-25	4004049.2	2565283.1	212.41	36%	3217797.8	2086152.7	222.66	35%	58335318.6	44268686.3	261.78	24%
DUST	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	1898490.1	1455505.7	224.89	23%	1843082.6	1595406.3	231.48	13%	42974410.1	32963139.3	243.93	23%
2024-25	1666205.1	1453291.1	241.92	13%	1542352.7	1221049.3	250.85	21%	35134148.3	28411394.8	278.65	19%
ORTHODOX	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	1705129.4	1430966.0	267.56	16%	1493808.4	1287893.4	280.47	14%	42420218.4	37030473.7	296.54	13%
2024-25	1163539.3	1035351.8	270.88	11%	1148025.0	994417.2	277.89	13%	28852923.1	25435704.6	305.71	12%
DARJEELING	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	47694.1	24756.5	300.00	48%	45885.4	30694.4	298.18	33%	1426924.9	910995.3	477.99	36%
2024-25	40854.1	29323.5	407.31	28%	67638.4	43434.2	313.80	36%	1753367.1	981568.3	434.79	44%
TOTAL	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2025-26	6847009.2	5192730.7	231.57	24%	6476678.8	5089169.5	238.29	21%	159204431.5	122070110.9	255.67	23%
2024-25	6874647.7	5083249.5	233.88	26%	5975813.9	4345053.4	244.13	27%	124075757.2	99097354.1	279.61	20%

PRICE RANGE	CTC LEAF					DUST				
% OF TEAS SOLD	2025/26		UP TO SALE 48			2025/26		UP TO SALE 48		
	SALE 48	SALE 47	2025/26	2024/25	2023/24	SALE 48	SALE 47	2025/26	2024/25	2023/24
BELOW 160	26.01	24.24	23.25	8.09	25.92	16.65	13.90	14.76	8.10	23.92
BETWEEN 160.00-179.99	8.05	8.50	7.09	5.63	7.44	4.32	4.69	4.59	3.43	7.47
BETWEEN 180.00-199.99	7.13	6.02	5.59	9.50	7.99	6.51	6.99	5.15	4.62	7.05
BETWEEN 200.00-219.99	10.52	6.61	6.70	9.64	11.21	10.50	9.49	6.95	7.59	11.33
BETWEEN 220.00-239.99	9.14	9.57	7.79	9.96	10.06	11.24	7.74	7.97	7.80	10.74
BETWEEN 240.00-259.99	11.58	14.95	11.13	9.59	9.79	19.54	20.16	13.99	8.71	11.44
BETWEEN 260.00-279.99	11.73	13.29	10.91	8.09	8.21	16.31	18.63	14.54	8.51	9.24
ABOVE 280	15.84	16.82	27.54	39.50	19.38	14.93	18.41	32.03	51.25	18.80

PRICE RANGE	ORTHODOX					PRICE RANGE	DARJEELING		
% OF TEAS SOLD	2025/26		UP TO SALE 48			% OF TEAS SOLD	2025/26		UP TO SALE 48
	SALE 48	SALE 47	2025/26	2024/25	2023/24		SALE 48	SALE 47	2025/26
BELOW 200	24.38	16.11	11.69	14.75	31.57	BELOW 300.00	59.02	60.26	31.31
BETWEEN 200.00-219.99	10.63	11.17	8.15	3.90	12.55	BETWEEN 301.00-400.99	15.14	16.99	9.08
BETWEEN 220.00-239.99	12.21	17.12	12.06	4.95	15.09	BETWEEN 401.00-500.99	7.10	5.08	7.31
BETWEEN 240.00-259.99	8.28	7.01	7.59	6.29	14.48	BETWEEN 501.00-600.99	12.85	10.25	23.19
BETWEEN 260.00-279.99	4.65	5.14	6.30	6.76	9.84	BETWEEN 601.00-700.99	3.91	6.41	15.35
ABOVE 280	39.85	43.44	54.22	63.35	16.47	ABOVE 701.00	1.98	1.01	13.76

FUTURE FRESH OFFERING (IN PACKAGES)															
SALE NO	THIS YEAR-2025 - 26					LAST YEAR-2024 - 25					DIFFERENCE				
	CTC LEAF	ORTH.	DARJ.	DUST	TOTAL	CTC LEAF	ORTH.	DARJ.	DUST	TOTAL	CTC LEAF	ORTH.	DARJ.	DUST	TOTAL
49	110229	69380	2731	48154	230494	98379	55807	2158	36608	192952	11850	13573	573	11546	37542
50	90467	58376	2439	41252	192534	84192	45978	1714	27582	159466	6275	12398	725	13670	33068
51	88620	65750	1646	38445	194461	100243	64137	1946	32600	198926	-11623	1613	-300	5845	-4465
TOTAL	289316	193506	6816	127851	617489	282814	165922	5818	96790	551344	6502	27584	998	31061	66145

Kolkata Monthly Price Movement All Teas



CTTA BUYING (ALL TEAS) FOR THE SALE 48

CTTA BUYING (ALL TEAS) FOR THE SALE 48											
	CTC LEAF			DUST				TOTAL			
	SALE 48										
OFFER	31,95,695.6		Kgs	OFFER	18,98,490.1		Kgs	OFFER	50,94,185.7		Kgs
SOLD	22,81,502.5		Kgs	SOLD	14,55,505.7		Kgs	SOLD	37,37,008.2		Kgs
SOLD %	71%			SOLD %	77%			SOLD %	73%		
ZONES	KGS.	AVG.	%		Kgs	AVG	%		Kgs	AVG	%
HUL	5,56,167.1	215.76	24%	HUL	5,87,540.5	248.36	40%	HUL	11,43,707.6	232.51	31%
W.India	4,11,901.8	234.08	18%	W.India	1,91,609.0	229.27	13%	W.India	6,03,510.8	232.55	16%
Local	3,70,121.8	210.21	16%	TCPL	1,77,135.3	203.97	12%	Local	4,03,485.8	206.32	11%
Exports	2,36,141.7	201.64	10%	Others	1,67,899.9	221.25	12%	Others	3,31,505.6	213.52	9%
N.India	2,22,022.0	212.40	10%	N.India	88,060.0	195.63	6%	N.India	3,10,082.0	207.64	8%
Others	1,63,605.7	205.59	7%	WI.Pack	70,618.0	221.43	5%	Exports	2,97,757.2	191.62	8%
WI.Pack	1,37,407.4	218.54	6%	Exports	61,615.5	153.20	4%	TCPL	2,87,103.0	187.90	8%
TCPL	1,09,967.7	162.02	5%	S.India	54,028.0	235.65	4%	WI.Pack	2,08,025.4	219.52	6%
Packeteers	33,527.4	195.76	1%	Local	33,364.0	163.23	2%	S.India	77,292.7	218.51	2%
S.India	23,264.7	178.71	1%	Packeteers	22,709.5	153.98	2%	Packeteers	56,236.9	178.89	2%
NI.Pack	17,375.2	210.46	1%	NI.Pack	926.0	236.00	0%	NI.Pack	18,301.2	211.75	0%
Grand Total	22,81,502.5	212.52	100%	TOTAL	14,55,505.7	224.89	100%	TOTAL	37,37,008.2	217.33	100%

	ORTHODOX			DARJEELING			
	SALE 48						
OFFER	17,05,129.4		Kgs	OFFER	47,694.1		Kgs
SOLD	14,30,966.0		Kgs	SOLD	24,756.5		Kgs
SOLD %	84%			SOLD %	52%		
ZONE	Kgs	AVG	%		Kgs	AVG	%
Local	3,71,425.7	252.29	26%	Local	12,333.4	308.99	50%
Others	3,58,968.4	286.87	25%	Others	7,044.7	282.83	28%
Middle East	2,53,193.7	261.87	18%	Exports	3,350.0	278.34	14%
Domestic	1,59,148.3	261.70	11%	Domestic	855.2	416.42	3%
W.India	80,899.1	300.59	6%	N.India	471.2	239.86	2%
N.India	57,230.8	270.23	4%	W.India	370.0	234.73	1%
Other Exports	56,986.6	272.39	4%	C.India	332.0	407.05	1%
Exports	42,957.4	252.05	3%				
CIS	42,097.9	230.80	3%				
HUL	7,205.1	241.47	1%				
CONTINENT	607.0	991.00	0%				
Packeteers	246.0	186.00	0%				
TOTAL	14,30,966.0	267.56	100%	TOTAL	24,756.5	300.00	100%

ASSAM CTC BATTING ORDER (GTAC+CTTA) Sale 14 to 48

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
HOOKHMOL	320065	465.97	276792	466.86
GATOONGA	340450	427.99	411983	489.77
HALMARI	703972	403.52	612051	417.73
MOKRUNG	157362	402.06	288630	460.36
HATIMARA	441212	392.52	333892	415.91
DECKIAJULI	469720	388.09	461820	356.54
SALKATHONI	377807	367.22	420984	412.45
DOOLAHAT	464479	362.89	492326	350.88
BANAMALIE	137436	357.49	155976	378.93
BORJAN	444810	352.17	429569	368.94
KAMARBUND	207361	350.60	195626	369.81
KHARIKATIA	419996	348.64	466501	366.77
DOOMNI	860458	342.06	890889	345.67
HIRAJULI	148927	338.78	176564	361.13
GHILLIDARY	182566	337.63	282075	367.25
HAJUA	419514	335.57	494916	385.28
GELAKEY	263904	335.16	274302	352.91
DEHA	324758	331.15	289691	355.41
DOOMUR DULLUNG	483956	331.06	580509	396.32
KOONTAI 'B'	1491825	326.28	1474970	364.52
DUFLATING	467893	325.82	427013	360.57
DEOHALL	659581	325.35	547337	320.80
CHARAIDEOPREMIUM	257872	323.98	210264	313.15
LOHPOHIA	128611	321.71	163901	350.35
JAMIRAH	163298	321.44	174657	337.32

** Above 100000Kgs.*

DOOARS CTC BATTING ORDER (STAC+CTTA) Sale 14 to 48

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
KARTICK	433720	347.37	266015	342.72
BINAGURI	915776	330.05	753047	316.61
JITI	723027	321.89	776739	299.85
ARYAMAN	125288	312.81	0	0.00
NEPUCHAPUR	308311	312.66	345064	302.94
RYDAK	710691	311.34	604118	314.08
BHATKAWA	188240	310.84	174335	299.49
HOPE	421622	304.69	366653	303.39
KARALAVALLEYROAL	301868	299.84	282480	281.13
GHATIA ROYAL	350764	298.12	169845	306.27
LAKHIPARA	244000	294.80	32411	246.98
MORAGHAT	614794	292.47	705372	300.90
GULMA	704438	291.13	418858	311.71
KUMARGRAM	472135	290.32	701546	282.64
BARADIGHI	586014	288.21	485423	301.84
ZURRANTEE	305560	287.54	263480	275.43
PAHARGOOMIAH	543388	287.22	489589	290.30
CHULSA	131508	286.90	289339	328.19
LEESH RIVER	653129	282.72	435315	286.70
GOPALPUR	484668	281.58	371649	276.58
DALGAON	700507	281.28	511947	311.20
DIMAGOLD	258221	271.67	0	0.00
AIBHEEL	968394	270.22	833430	283.69
GANDRAPARA	767276	269.35	653591	287.28
NOWERA NUDDY	387775	269.08	356638	261.53

* Above 100000Kgs.

ASSAM ORTHODOX BATTING ORDER (GTAC+CTTA) Sale 14 to 48

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
HARMUTTY	399604	392.41	367037	391.35
DEJOO	282350	390.63	328199	394.42
OAKLANDS	103506	377.70	19792	390.09
MOKALBARI EAST	352752	365.53	388949	373.94
BORPATRA	424361	352.05	319166	365.39
SINGLIJAN	302123	345.03	256137	334.46
HATTIALLI	573290	344.12	388072	317.74
DHELAKHAT	478908	343.44	470320	346.29
DIKOM	531929	342.64	529136	348.23
RAIDANG 'D'	664548	341.15	880659	298.59
LANGHARJAN	259337	339.81	337	375.02
KOOMSONG	822628	339.72	624915	311.92
SESSA 'B'	461467	339.56	267254	342.09
PHILLOBARI	486939	336.53	395289	286.36
MADHUTING	908662	332.20	174728	343.80
METHONI	472688	331.47	416283	343.08
PENGAREE	624330	330.43	585020	346.41
JOONKTOLLEE	356990	328.11	70910	338.35
NONAIPARA	313688	326.20	250006	323.41
DAISAJAN	542127	325.08	371636	292.36
MOHUNBAREE	187957	323.38	150847	328.10
GINGIA	302451	318.01	310922	314.39
MUTTUCK	429646	317.44	370939	326.76
BORDUBI	1016169	317.21	975469	285.85
BOKAKHAT	419041	314.49	426891	324.01

** Above 100000Kgs.*

DARJEELING BATTING ORDER Sale 14 to 48

MARK	2025-26		2024-25	
	KGS	AVG	KGS	AVG
TEESTA VALLEY	58371	657.98	60801	590.88
CASTLETON	41960	653.41	38740	712.52
GIELLE	41400	653.39	37793	600.09
BALASUN	18102	639.56	21019	477.98
SUNGMA	22490	609.11	29933	572.83
THURBO	57500	557.19	49211	581.89
PUTTABONG	30637	555.71	51104	481.89
NAMRING(UPPER)	43856	525.15	47654	371.67
NAMRING	13020	515.35	9255	347.35
MARGARET'S HOPE	63217	509.83	37788	618.47
SINGBULLI (ORGANIC)	19545	506.86	8829	508.08
GOPALDHARA	29688	491.08	29978	418.93
BARNESBEG (ORGANIC)	10796	485.54	8274	627.20
GYA/MILLIKTHONG	13299	472.57	6959	525.42
BADAMTAM (ORGANIC)	26272	469.55	17967	509.05
ORANGE VALLEY	5926	456.78	2019	534.75
GLENBURN	91505	436.13	47488	439.82
JUNGPANAUPPER	7417	430.08	15105	474.59
MIM	45231	429.66	38203	316.90
ROHINI	46427	423.35	32060	426.30
HILLTON	63084	356.90	70061	367.53
UPPER FAGU	72574	342.91	64513	354.41
NURBONG	7855	261.66	4096	366.35
SEPOYDHOORAH	6302	244.07	0	0.00
NORTH TUKVAR	20843	240.90	28116	234.92

* Above 5000 Kgs.

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