



## J THOMAS & COMPANY PRIVATE LIMITED

KOLKATA MARKET SYNOPSIS - SALE 20 (2024 - 25)

CTC
Market Report
• Good demand
• Liquoring Assams fully firm. Medium sorts irregular around last levels.
• Few Cachar and Dooars barely steady.

Buying Analysis
• Western India: Good support on liquoring sorts
• TCPL: Selective Hindustan Unilever: Operated
• Exporters : Fair enquiry on bolder brokens Other Internal and local: Some enquiry

Orthodox
Market Report
• Strong demand
• Well-made whole leaf and brokens sold at fully firm rates. Remainder irregularly lower following quality.
• Few fannings and secondaries irregular around last.

Buying Analysis
• Middle East : Active
• CIS: Operated

DUST
Market Report
• Liquoring Assams sold readily at irregularly lower rates.
• Remainder tended lower.
• Teas showing decline in quality saw some withdrawals.

Buying Analysis
• Hindustan Unilever: Good Support TCPL : Selective
• Western India & Other regional packeteers : Operated on the better teas
• South Indian Packeteers: Some enquiry Other Internals: Selective

Darjeeling
Market Report
• Good demand
• Well made whole leaf grades still possessing first flush character sold between Rs 800-1000/-.
• Remaining teas sold at Rs.600- 800/- . Lower elevation teas sold between Rs 400-500. Greenish broken and fannings met with good demand and sold as per quality. Flakier, blackish sorts sold at sub 300/- levels with some remaining unsold.
• Exporters: Mainstay Local/ Internal: Good support Major Blenders: Did not operate

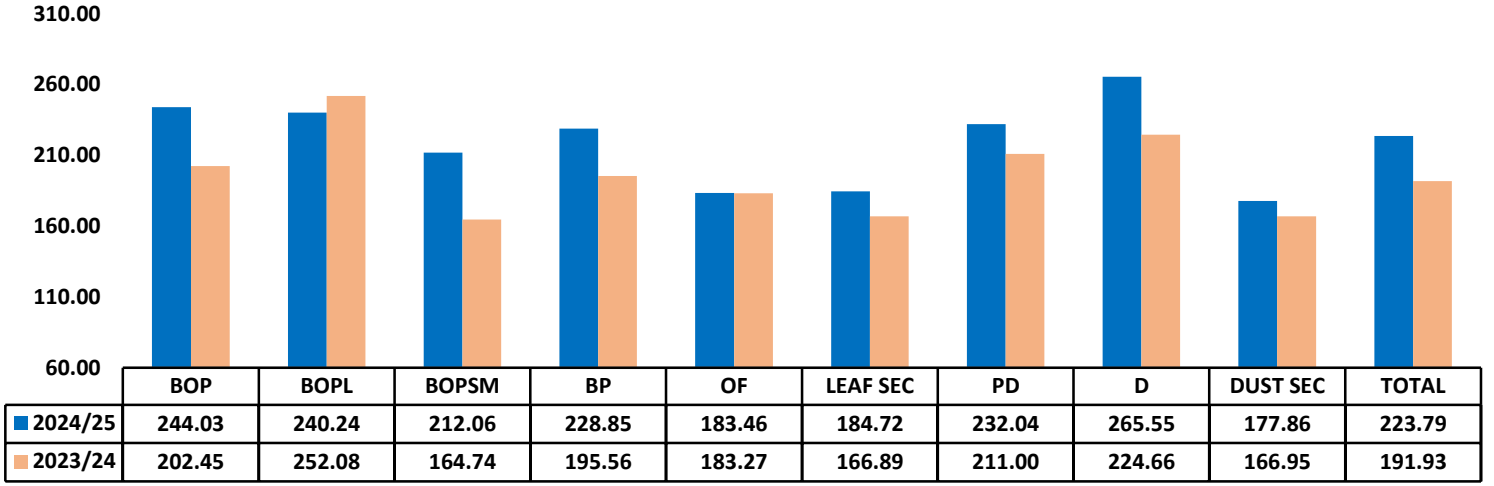
### AUCTION AVERAGES

	2024/25			2023/24			UP TO SALE 20		
	SALE 20	SALE 19	+/-	SALE 20	SALE 19	+/-	2024/25	2023/24	2022/23
<b>CTC LEAF</b>	236.34	234.49	1.85	181.28	196.70	-15.42	223.43	190.86	212.84
<b>DUST</b>	226.02	217.92	8.11	189.50	189.22	0.29	224.63	194.90	223.71
<b>TOTAL</b>	232.84	229.26	3.58	183.69	194.30	-10.61	223.79	191.93	215.51
<b>ORTHODOX</b>	287.61	292.15	-4.53	197.25	210.08	-12.82	296.47	223.99	263.44
<b>DARJEELING</b>	645.23	804.33	-159.10	596.90	811.52	-214.62	565.23	686.39	524.67
<b>ALL TEAS</b>	261.77	261.74	0.03	196.91	207.04	-10.13	258.21	210.64	235.15

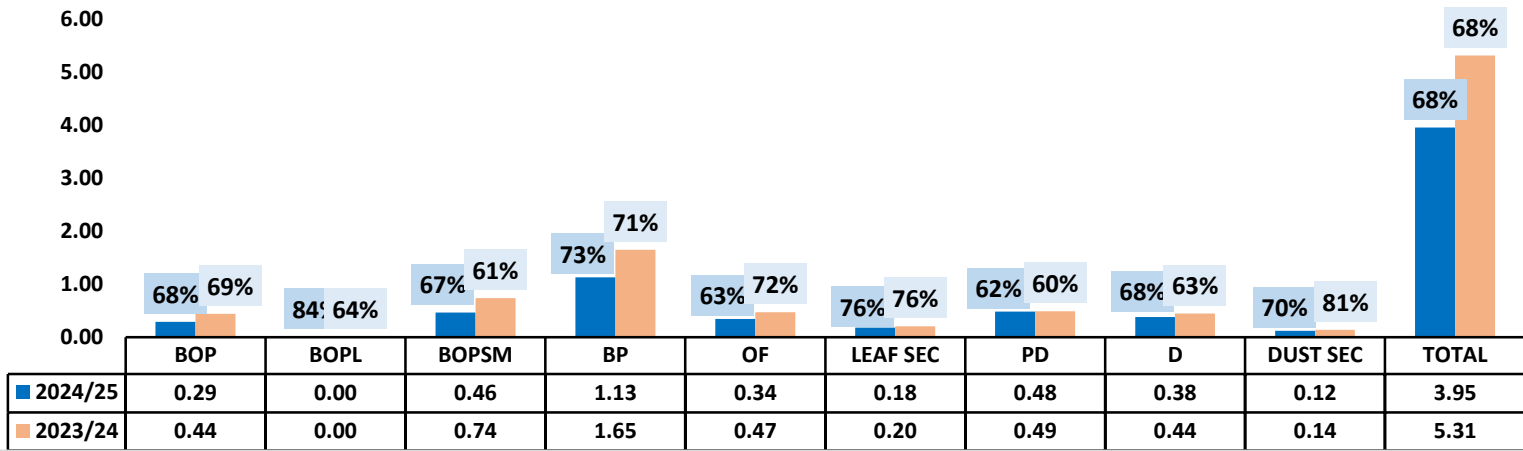
### KOLKATA AUCTION AVERAGES

SALE		16	17	18	19	20	21
<b>CTC LEAF</b>	2024/25	232.22	202.72	230.63	234.49	236.34	
	2023/24	193.72	201.03	187.49	196.70	181.28	184.91
<b>DUST</b>	2024/25	262.62	219.49	242.43	217.92	226.02	
	2023/24	209.04	197.76	193.73	189.22	189.50	189.65
<b>TOTAL</b>	2024/25	237.64	207.06	234.45	229.26	232.84	
	2023/24	197.09	200.11	189.32	194.30	183.69	186.28
<b>ORTHODOX</b>	2024/25	318.56	308.28	299.86	292.15	287.61	
	2023/24	245.28	234.46	223.92	210.08	197.25	206.43
<b>DARJEELING</b>	2024/25	174.35	394.71	940.38	804.33	645.23	
	2023/24	713.04	869.17	856.91	811.52	596.90	518.46

### Kolkata Grade Wise Averages CTC Leaf / Dust Upto Sale 20



### Kolkata Grade Wise Sold Quantity (M. Kgs) CTC Leaf / Dust Upto Sale 20



### KOLKATA GRADE WISE ORTHODOX AVERAGES UPTO SALE 20

GRADE	2024 - 25		2023 - 24		GRADE	2024 - 25		2023 - 24		GRADE	2024 - 25		2023 - 24	
	QTY.	AVG	QTY.	AVG		QTY.	AVG	QTY.	AVG		QTY.	AVG	QTY.	AVG
TGFOP1	133756.5	380.39	179430.0	259.44	FBOP	415188.4	311.17	731489.7	229.50	GBOP1/FBOP1	247922.5	204.38	410221.8	152.47
TGFOP	304721.6	358.06	527109.1	248.09	GFBOF	267272.1	301.45	269442.0	204.02	BOPF/GOF/FOF	179194.3	185.20	373896.6	140.63
GFOP	173758.4	345.14	304432.3	256.55	GBOP	274717.1	285.69	309678.4	194.74					
FOP	167724.8	292.37	319070.2	242.57	BPS	154429.4	337.29	225872.0	326.65					

### 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	6,18,430	4,75,809	243.89	23%	5,85,578	4,38,204	243.22	25%	27,45,925	19,55,849	227.37	29%
FANNINGS	2,54,701	1,78,660	233.19	30%	2,21,436	1,24,791	219.53	44%	10,40,875	6,44,023	222.05	38%
LEAF SEC.	82,305	59,362	185.30	28%	57,871	45,375	191.39	22%	2,32,964	1,75,983	184.72	24%
LEAF TOTAL	9,55,434.9	7,13,830.6	236.34	25%	8,64,884.2	6,08,370.7	234.49	30%	40,19,764.3	27,75,855.1	223.43	31%
DUST	4,58,160	3,16,842	233.94	31%	4,23,147	2,49,054	220.44	41%	16,03,745	10,57,086	229.97	34%
DUST SEC.	62,721	49,981	175.84	20%	46,794	31,727	198.10	32%	1,72,359	1,20,789	177.86	30%
DUST TOTAL	5,20,880.7	3,66,823.6	226.02	30%	4,69,940.6	2,80,781.1	217.92	40%	17,76,104.1	11,77,875.0	224.63	34%
TOTAL	14,76,315.7	10,80,654.3	232.84	27%	13,34,824.8	8,89,151.8	229.26	33%	57,95,868.3	39,53,730.0	223.79	32%

### OFFER / SOLD QUANTITY & AVERAGE PRICE ORTHODOX

	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
WHOLE LEAF	2,77,346	2,55,501	339.43	8%	2,45,751	2,36,617	339.37	4%	11,53,611	10,88,219	336.38	6%
BROKENS	3,52,720	3,04,851	301.86	14%	3,34,334	3,04,265	302.17	9%	14,78,668	12,97,483	304.97	12%
FANNINGS	67,702	60,215	178.66	11%	61,780	45,538	180.92	26%	2,79,494	2,14,124	179.19	23%
SECONDARY	1,29,483	1,23,669	198.50	4%	1,05,488	99,382	199.99	6%	3,34,221	3,10,484	201.96	7%
ORTH. TOTAL	8,27,250.5	7,44,235.9	287.61	10%	7,47,354.3	6,85,802.0	292.15	8%	32,45,993.0	29,10,310.2	296.47	10%

### OFFER / SOLD QUANTITY & AVERAGE PRICE DARJEELING

	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
WHOLE LEAF	31,528	19,974	784.54	37%	16,208	9,845	985.76	39%	65,313	40,815	850.87	38%
BROKENS	11,684	7,473	402.49	36%	2,712	2,492	485.38	8%	21,493	13,139	444.75	39%
FANNINGS	7,197	3,930	398.77	45%	3,149	2,445	398.84	22%	33,471	26,689	187.70	20%
DARJ. TOTAL	50,408.4	31,376.6	645.23	38%	22,069.0	14,781.9	804.33	33%	1,20,276.5	80,643.9	565.23	33%

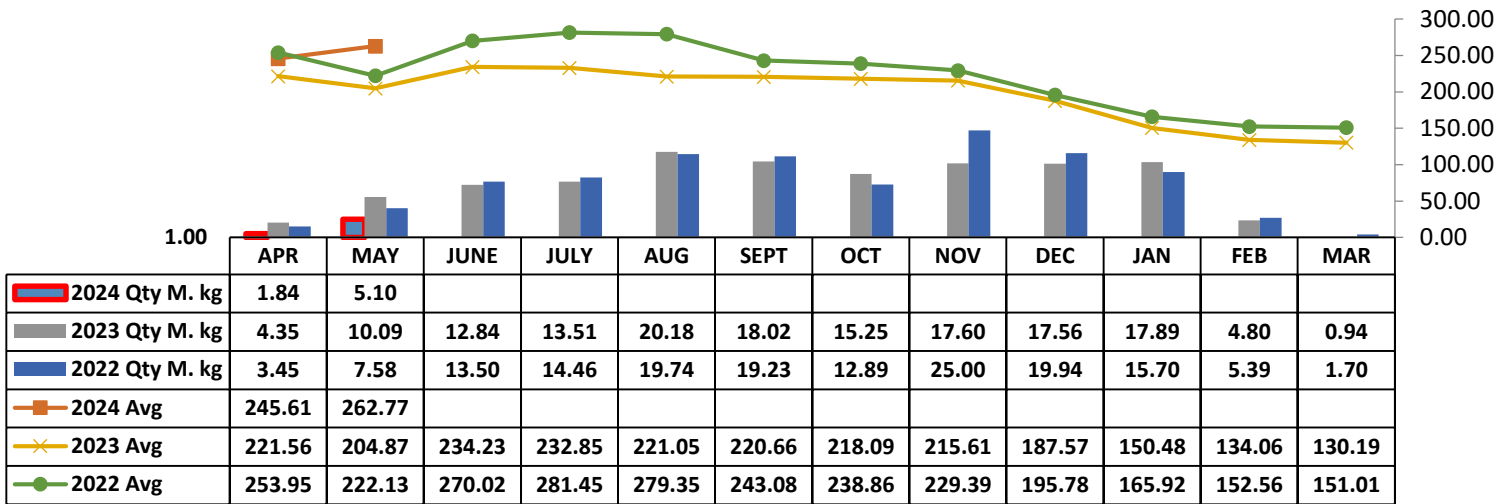
OFFER / SOLD QUANTITY & AVERAGE PRICE												
CTC	THIS SALE				LAST SALE				TO DATE			
	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2024-25	955434.9	713830.6	236.34	25%	864884.2	608370.7	234.49	30%	4019764.3	2775855.1	223.43	31%
2023-24	1041076.0	746143.5	181.28	28%	935830.1	739648.3	196.70	21%	5697640.7	3900085.4	190.86	32%
DUST	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2024-25	520880.7	366823.6	226.02	30%	469940.6	280781.1	217.92	40%	1776104.1	1177875.0	224.63	34%
2023-24	466089.3	309057.3	189.50	34%	489482.8	348391.2	189.22	29%	2129992.4	1412291.6	194.90	34%
ORTHODOX	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2024-25	827250.5	744235.9	287.61	10%	747354.3	685802.0	292.15	8%	3245993.0	2910310.2	296.47	10%
2023-24	1293043.3	911555.2	197.25	30%	1365202.1	816940.6	210.08	40%	6761450.0	4623529.6	223.99	32%
DARJEELING	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2024-25	50408.4	31376.6	645.23	38%	22069.0	14781.9	804.33	33%	120276.5	80643.9	565.23	33%
2023-24	57121.0	34108.8	596.90	40%	27990.4	18833.0	811.52	33%	130285.4	79215.1	686.39	39%
TOTAL	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %	OFFERED	SOLD	AVG.	OUT %
2024-25	2353974.6	1856266.7	261.77	21%	2104248.0	1589735.6	261.74	24%	9162137.8	6944684.1	258.21	24%
2023-24	2857329.7	2000864.8	196.91	30%	2818505.5	1923813.1	207.04	32%	14719368.6	10015121.7	210.64	32%

PRICE RANGE	CTC LEAF						DUST				
% OF TEAS SOLD	2024/25		UP TO SALE 20			2024/25		UP TO SALE 20			
	SALE 20	SALE 19	2024/25	2023/24	2022/23	SALE 20	SALE 19	2024/25	2023/24	2022/23	
	BELOW 160	21.05	20.97	30.19	43.03	25.53	27.48	22.97	27.93	37.42	18.09
BETWEEN 160.00-179.99	8.35	11.64	8.69	8.04	11.88	8.48	15.07	8.55	9.63	12.33	
BETWEEN 180.00-199.99	6.69	5.38	5.40	4.84	10.58	3.73	5.06	4.45	6.21	8.76	
BETWEEN 200.00-219.99	5.38	8.08	6.04	7.81	9.57	4.82	8.01	6.20	6.72	9.98	
BETWEEN 220.00-139.99	8.93	6.81	5.47	8.81	8.29	7.75	5.17	6.57	12.47	9.96	
BETWEEN 240.00-259.99	9.64	7.75	7.07	7.40	7.74	8.97	8.19	6.90	11.46	10.51	
BETWEEN 260.00-279.99	8.84	8.11	6.61	6.45	6.61	9.44	9.74	8.11	6.28	6.87	
ABOVE 280	31.11	31.26	30.52	13.60	19.79	29.33	25.79	31.29	9.80	23.50	

PRICE RANGE	ORTHODOX					PRICE RANGE	DARJEELING		
% OF TEAS SOLD	2024/25		UP TO SALE 20			% OF TEAS SOLD	2024/25		UP TO SALE 20
	SALE 20	SALE 19	2024/25	2023/24	2022/23		SALE 20	SALE 19	2024/25
	BELOW 200	16.14	13.47	11.55	28.23		12.78	BELOW 300.00	7.15
BETWEEN 200.00-219.99	3.10	3.23	3.01	11.29	4.09	BETWEEN 301.00-400.99	11.77	11.94	10.81
BETWEEN 220.00-239.99	4.62	4.09	4.05	16.50	8.13	BETWEEN 401.00-500.99	19.86	6.16	9.47
BETWEEN 240.00-259.99	7.12	3.58	3.73	16.34	8.48	BETWEEN 501.00-600.99	6.30	4.61	3.63
BETWEEN 260.00-279.99	5.93	8.05	6.24	8.18	34.64	BETWEEN 601.00-700.99	17.20	12.33	10.85
ABOVE 280	63.09	67.58	71.43	19.45	31.88	ABOVE 701.00	37.74	57.74	33.72

FUTURE FRESH OFFERING (IN PACKAGES)															
SALE NO	THIS YEAR-2024 - 25					LAST YEAR-2023 - 24					DIFFERENCE				
	CTC LEAF	ORTHODOX	DARJEELING	DUST	TOTAL	LEAF	ORTHODOX	DARJEELING	DUST	TOTAL	LEAF	ORTHODOX	DARJEELING	DUST	TOTAL
21	26367	31065	3410	13306	74148	29954	48914	4284	9556	92708	-3587	-17849	-874	3750	-18560
22	28403	31501	3568	13922	77394	30453	32875	3904	10528	77760	-2050	-1374	-336	3394	-366
TOTAL	54770	62566	6978	27228	151542	60407	81789	8188	20084	170468	-5637	-19223	-1210	7144	-18926

## Kolkata Monthly Price Movement All Teas



## CTTA BUYING (ALL TEAS) FOR THE SALE 20

	CTC LEAF			DUST			TOTAL				
	SALE 20										
OFFER	9,55,434.9 Kgs			5,20,880.7 Kgs			14,76,315.7 Kgs				
SOLD	7,13,830.6 Kgs			3,66,823.6 Kgs			10,80,654.3 Kgs				
SOLD %	75%			70%			73%				
ZONES	KGS.	AVG.	%	Kgs	AVG	%	Kgs	AVG	%		
W.India	2,54,457.9	264.07	36%	W.India	1,04,614.7	255.10	29%	W.India	3,59,072.6	261.46	33%
Local	1,44,449.0	233.85	20%	Others	68,388.2	197.78	19%	Local	1,53,016.2	230.18	14%
N.India	1,02,910.8	189.00	14%	HUL	63,464.8	280.02	17%	N.India	1,36,024.0	188.60	13%
HUL	57,051.7	296.92	8%	S.India	36,733.2	219.83	10%	HUL	1,20,516.5	288.02	11%
Others	45,398.6	216.78	6%	N.India	33,113.2	187.35	9%	Others	1,13,786.8	205.36	11%
Exports	34,096.8	175.15	5%	Exports	28,738.2	146.22	8%	Exports	62,835.0	161.92	6%
WI.Pack	32,566.0	216.01	5%	WI.Pack	10,312.2	219.21	3%	S.India	51,331.7	212.40	5%
TCPL	19,472.6	192.91	3%	Local	8,567.2	168.28	2%	WI.Pack	42,878.2	216.78	4%
S.India	14,598.5	193.72	2%	TCPL	5,179.2	206.70	1%	TCPL	24,651.8	195.81	2%
Packeteers	6,802.2	239.52	1%	NI.Pack	4,427.6	192.42	1%	Packeteers	10,087.4	242.94	1%
NI.Pack	2,026.5	137.92	0%	Packeteers	3,285.2	250.01	1%	NI.Pack	6,454.1	175.31	1%
Grand Total	7,13,830.6	236.34	100%	TOTAL	3,66,823.6	226.02	100%	TOTAL	10,80,654.3	232.84	100%

	ORTHODOX			DARJEELING			
	SALE 20						
OFFER	8,27,250.5 Kgs			50,408.4 Kgs			
SOLD	7,44,235.9 Kgs			31,376.6 Kgs			
SOLD %	90%			62%			
ZONE	Kgs	AVG	%	Kgs	AVG	%	
Middle East	3,74,813.2	279.09	50%	Local	15,680.2	654.27	50%
Others	1,56,635.7	278.23	21%	Exports	9,037.2	519.28	29%
Local	1,07,238.1	309.20	14%	Other Exports	2,633.0	740.32	8%
N.India	60,236.1	313.56	8%	Others	1,594.4	1,016.85	5%
Exports	22,301.0	320.92	3%	Domestic	869.6	968.88	3%
CIS	15,488.4	311.05	2%	W.India	742.8	594.11	2%
Other Exports	4,574.7	287.63	1%	C.India	436.6	723.48	1%
W.India	1,243.9	213.81	0%	S.India	382.8	321.00	1%
Domestic	852.4	151.50	0%				
Packeteers	426.2	156.00	0%				
S.India	426.2	161.00	0%				
TOTAL	7,44,235.9	287.61	100%	TOTAL	31,376.6	645.23	100%

## ASSAM CTC BATTING ORDER (GTAC+CTTA) Sale 20

MARK	2024-25		2023-24	
	KGS	AVG	KGS	AVG
MOKRUNG	8404	479.23	8159	395.12
GATOONGA	13576	473.93	21543	417.20
HOOKHMOL	13297	439.60	12266	375.86
HATIMARA	15597	429.18	0	0.00
HALMARI	48572	424.63	44265	389.37
DECKIAJULI	40163	406.06	36197	377.68
DOOMUR DULLUNG	26487	381.07	0	0.00
HAJUA	21710	380.68	18766	333.83
DUFLATING	8827	377.91	11342	341.17
KAMARBUND	9337	376.04	6160	333.24
BANAMALIE	13214	373.64	8551	363.17
DOOMNI	49636	363.29	30114	334.43
KHARIKATIA	23939	359.72	21856	316.67
GHILLIDARY	20336	356.18	15967	306.90
NAGRIJULI	40560	354.66	15119	308.17
BIJLEEJAN	27773	353.20	38807	264.87
HAROOCHARAI	25827	351.30	0	0.00
HIRAJULI	8753	349.82	18815	295.06
ROMAI	19005	347.84	19159	267.53
KHOOMTAIE 'A'	10235	346.08	15576	297.69
NAHORHABI(CLSPL)	6310	345.26	13241	301.08
DUKLINGIA	52632	345.00	42121	310.18
KOPATI	53278	341.57	0	0.00
KHONGEA	5738	339.57	19877	277.61
KOOMTAI 'B'	29561	339.12	41039	275.70

\* Above 5000Kgs.

## DOOARS CTC BATTING ORDER (STAC+CTTA) Sale 14 to 20

MARK	2024-25		2023-24	
	KGS	AVG	KGS	AVG
KARTICK	36169	364.15	36353	339.99
RYDAK	56536	343.63	84741	280.46
BARADIGHI	69362	332.99	61873	311.03
MAINAKROYAALE	6539	324.54	10749	306.25
CHULSA	53714	322.25	39222	307.45
BHATKAWA	32935	314.04	16002	253.78
DALGAON	94882	309.38	111224	312.09
CHALOUNI	57060	308.25	53946	288.27
ANANDAPURROYAL	14310	302.37	28158	259.04
PAHARGOOMIAH	82638	298.53	69387	294.96
LEESH RIVER	94495	297.35	88740	283.38
KUMARGRAM	62933	297.01	71747	302.00
DIANA (RAMBARI)	48313	296.91	9017	303.09
AIBHEEL	117995	295.44	112644	275.07
HOPE	89253	294.92	71057	307.16
DANGUAJHAR	118895	294.08	115000	285.46
GANDRAPARA	147701	292.85	110068	278.77
GULMA	59136	292.15	63887	301.94
MORAGHAT	123134	287.98	89557	258.98
SANKOS	78083	287.34	50421	301.80
BINAGURI	137292	287.15	130705	295.38
MEENGLAS	99891	286.38	72391	272.88
NEPUCHAPUR	65566	285.67	76727	286.11
JITI	148689	285.40	110329	304.99
ARYAMAN SPECIAL	15143	283.58	13039	302.93

\* Above 5000Kgs.

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

MARK	2024-25		2023-24	
	KGS	AVG	KGS	AVG
HARMUTTY	24660	349.23	29553	240.73
BOKAKHAT	8914	345.32	19153	233.46
DEJOO	44181	341.16	36719	257.97
ORANGAJULI	10197	329.75	32421	206.11
MADHUTING	51760	325.18	75607	238.04
HATTIALLI	24607	322.77	55991	207.12
BORPATRA	16452	322.14	40763	246.59
NOKHROY	33653	321.45	31696	252.75
METHONI	18478	319.25	624	292.25
PENGAREE	77315	319.13	34361	241.90
SESSA 'B'	31180	317.71	37951	230.43
MOHUNBAREE	13927	317.42	11562	229.76
GINGIA	38429	316.36	67068	241.78
DHELAKHAT	40601	316.27	41758	228.39
SINGLIJAN	21329	315.39	50391	236.24
MOKALBARI EAST	37545	314.56	6220	208.18
PERTABGHUR	28366	313.84	52322	218.03
MUTTUCK	36191	312.47	32850	197.65
NONAIPARA	5815	312.21	35097	217.75
MAJULIGHUR	61925	311.69	108358	232.51
BARGANG	16874	311.24	44060	238.89
DIKOM	39981	310.57	85417	235.48
SEAJULI	48928	310.17	46532	232.29
NAHORANIHIGHGROWN	33694	309.80	36028	218.36
MENOKA	39118	309.15	31632	231.06

\* Above 5000Kgs.

## DARJEELING BATTING ORDER Sale 14 to 20

MARK	2024-25		2023-24	
	KGS	AVG	KGS	AVG
LIZA HILL	71	2500.00	0	0.00
TURZUM	578	1578.98	187	1150.71
MIM	266	1024.96	4075	655.45
GOPALDHARA	46	1000.00	1882	858.05
PUTTABONG	4522	984.20	2243	931.22
GIELLE	2978	959.77	4006	974.51
SUNGMA	1048	950.88	1009	846.62
GYA/MILLIKTHONG	606	948.00	710	421.00
RISHEEHAT(ORGANIC)	3302	928.42	233	906.43
TEESTA VALLEY	2937	924.13	5329	1093.50
BADAMTAM (ORGANIC)	1867	921.97	2693	860.79
MARGARET'S HOPE	3866	918.44	3636	761.62
CASTLETON	5428	839.58	3333	1024.73
BARNESBEG (ORGANIC)	1910	819.66	3166	863.09
BALASUN	1792	748.68	1190	816.73
GLENBURN	3660	748.57	2924	797.70
THURBO	5098	711.54	8149	882.51
ROHINI	1230	622.96	2606	632.62
CHAMLING	289	575.00	193	523.50
POOBONG	1756	506.57	1383	492.94
NORTH TUKVAR	254	461.46	355	407.65
UPPER FAGU	6026	441.24	9945	436.57
HILLTON	1195	392.94	530	714.31
NURBONG	976	388.36	297	617.20
MISSION HILL	3737	369.32	5363	336.07

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