



## TEA BROKERS EAST AFRICA LIMITED

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### Tea Market Report: Sale 39 of 29th - 30th September 2025

There was good general demand in the market for the 106,161 packages (7.14m/kgs) on offer with 18.14% unsold.

#### Leaf Grades (M2 & M3)

**Offerings:** 50,760 packages (3.30m/kgs) – 19.62% unsold.

#### BP1:

**Best** – irregular and varied between USC48 above previous rates to easier by up to USC54.

**Brighter** – Were easier by up to USC52 but some lines appreciated by up to USC19.

**Mediums** – KTDA mediums were irregular and ranged between USC18 dearer to easier by up to USC22 while plantation mediums were about steady to USC11 dearer but some teas shed by up to USC2.

**Lower Medium** – Firm to dearer by up to USC16 to USC8 below previous levels.

**Plainer** – Saw strong enquiry and varied between steady to USC13 above last levels to easier by up to USC14.

#### PF1:

**Best** – Were mostly discounted by up to USC22.

**Brighter** – Shed up to USC18.

**Mediums** – KTDA mediums mostly lost by up to USC22 but select lines gained by up to USC16. Plantation mediums saw strong but irregular interest ranging between USC8 dearer to USC6 below last prices.

**Lower Medium** – Saw irregular support at firm to USC8 dearer to easier by up to USC6.

#### Current and Future Fresh Auction Offerings

Country	Sale 39 29 - 30 Sept'25		Sale 39 23 - 24 Sept'24		Sale 40 6 - 7 Oct' 25		Sale 41 13 - 14 Oct'25	
	MG	SG	MG	SG	MG	SG	MG	SG
Kenya	63,400	5,140	84,960	9,060	66,080	5,440	69,640	6,040
Uganda	8,720	6,680	7,120	4,700	9,720	7,060	7,240	6,140
Tanzania	0	0	200	160	0	0	0	0
Rwanda	5,720	420	3,520	710	4,960	600	4,960	440
Burundi	40	100	0	720	560	160	480	520
Zambia	0	0	0	0	0	0	0	0
Malawi	0	0	0	0	0	0	0	0
Madagascar	0	0	0	0	0	0	0	0
Zimbabwe	0	0	0	0	0	0	0	0
D R Congo	0	0	0	0	0	0	0	0
Mozambique	0	0	0	0	0	0	0	0
Ethiopia	0	0	0	0	0	0	0	0
Reprints	15,721	220	42,360	2,959	14,880	320	10,880	160
<b>Total</b>	<b>77,880</b>	<b>12,340</b>	<b>95,800</b>	<b>15,350</b>	<b>81,320</b>	<b>13,260</b>	<b>82,320</b>	<b>13,140</b>
	<b>90,220</b>		<b>111,150</b>		<b>94,580</b>		<b>95,460</b>	

**Plainer** – Some select teas shed by up to USC5 but others were dearer by up to USC14.

#### DUST Grades (M1)

**Offerings:** 42,841 packages (3.19m/kgs) – 19.84% unsold.

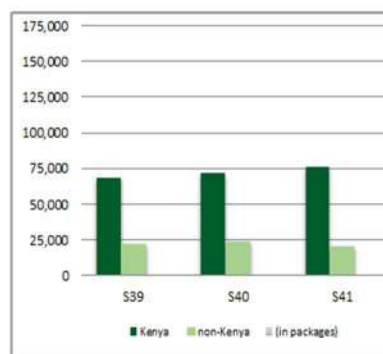
#### PDUST:

**Best** – Irregular ranging between steady to dearer by up to USC38 to mostly easier by up to USC14.

**Brighter** – More irregular interest ranging between USC17 dearer to easier by up to USC23.

**Mediums** – KTDA mediums saw irregular support and varied between USC7 above last levels to easier by up to USC12 while plantation mediums shed by up to USC9.

**Lower Medium** – Were mostly firm with some lines up to



USC14 dearer while others lost up to USC6.

**Plainer** – Fair absorption and were mostly easier by up to USC6 but a few select lines gained by up to USC16.

continued ....

**DUST1:**

**Best – Firm to USC11 above previous rates for some teas to easier by up to USC27.**

**Brighter –** Lost up to USC15 but some select invoices appreciated by up to USC14.

**Mediums –** KTDA mediums met irregular enquiry and ranged between USC12 dearer to easier by up to USC20 with plantation mediums discounted by up to USC11.

**Lower Medium –** Irregular interest and ranged between USC4 dearer to easier by a similar margin.

**Plainer –** Firm to USC7 above previous rates to easier by up to USC10.

**Secondary Grades (S1)**

**Offerings:** 12,560 packages ( 0.65m/kgs) – 6.37% unsold.

In the Secondary Catalogues, **BPs** were steady to dearer while **PFs** held firm. Clean well sorted coloury **Fannings** were irregular and tended easier with **similar DUSTs** shedding value. **Other Fannings** sold at about previous levels with **DUSTs** steady. **BMFs** were readily absorbed.

**Markets**

**Pakistan Packers, Yemen and other Middle Eastern countries** maintained support with less enquiry from **Afghanistan and Bazaar. Kazakhstan and other CIS**

**states** were more selective and showed less participation while **Egyptian Packers** were active. **UK** were active but selective with more interest from **Russia. Sudan** remained absent with some enquiry from **South Sudan. Local Packers** showed less support while **Somalia** maintained interest at the lower end of the market.

## Mombasa Auction Hammer Market Analysis - Sale No 39

	Category (Band)	Percentage volume sold	Average Price ranges (for the marks within the category)		Min-Max Prices per grade							
					BP1		PF1		PD		DUST1	
			Min	Max	Min	Max	Min	Max	Min	Max	Min	Max
1	Best	71%	3.42	4.22	2.76	4.8	3.35	3.82	3.44	4.05	3.42	3.83
2	Below Best	76%	2.46	3.62	1.85	4.04	2.47	3.52	2.2	3.7	2.54	3.63
3	Good	78%	1.78	2.73	1.4	2.59	1.7	2.91	1.65	2.63	1.65	2.64
4	Best Medium	96%	1.59	2.02	1.52	1.85	1.6	2	1.6	2.04	1.47	1.78
5	Medium	86%	1.27	1.81	1.29	1.76	1.32	1.97	1.25	1.88	1.15	1.75
6	Lower Medium	77%	0.99	1.53	1.1	1.43	1	1.84	0.95	1.41	0.95	1.43
7	Plain	84%	0.89	1.62	1.14	1.39	0.88	1.59	0.86	1.65	0.88	1
	Totals	80%	0.89	4.22	1.1	4.8	0.88	3.82	0.86	4.05	0.88	3.83
	Category (Band)	Percentage of Total Sold	Average Prices per grade								Totals	
			BP1		PF1		PD		DUST1			
			Kgs	Avg	Kgs	Avg	Kgs	Avg	Kgs	Avg	Kgs	Avg
1	Best	7%	40148	3.52	175060	3.52	74888	3.7	56916	3.61	347012	3.57
2	Below Best	20%	130930	2.86	412612	3.16	289986	3.44	132690	3.33	966218	3.23
3	Good	39%	325743	1.8	631564	2.25	732272	1.88	199745	1.91	1889324	1.99
4	Best Medium	14%	59516	1.71	223824	1.83	360612	1.79	25832	1.67	669784	1.79
5	Medium	11%	83502	1.5	170289	1.63	244080	1.65	28167	1.44	526038	1.61
6	Lower Medium	6%	41392	1.29	90240	1.24	119320	1.13	56396	1.12	307348	1.18
7	Plain	3%	30876	1.27	25716	1.1	61336	1.05	22380	0.96	140308	1.09
	Totals	100%	712107	2	1729305	2.41	1882494	2.07	522126	2.29	4846032	2.21

## Average Auction Hammer Quantities and Prices by Country

Country of Origin	Main			Secondary			Total			Total for Corresponding Sale for Last Year		
	Pkgs	Kgs	USC	Pkgs	Kgs	USC	Pkgs	Kgs	USC	Pkgs	Kgs	USC
Kenya	62,780	4,436,881	221	4,880	266,206	130	67,660	4,703,087	215	70,120	4,806,793	218
Uganda	7,360	449,393	113	6,500	310,363	94	13,860	759,756	105	11,620	667,208	101
Tanzania	-	-	-	-	-	-	-	-	-	500	30,916	121
Rwanda	4,800	338,176	324	420	28,880	218	5,220	367,056	315	3,720	258,096	308
Burundi	460	24,826	197	20	784	130	480	25,610	195	478	29,264	188
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>75,400</b>	<b>5,249,276</b>	<b>218</b>	<b>11,820</b>	<b>606,233</b>	<b>116</b>	<b>87,220</b>	<b>5,855,509</b>	<b>207</b>	<b>86,438</b>	<b>5,792,277</b>	<b>208</b>

Sale Number	Previous Sale's Quantities and Prices									Total for Corresponding Sale for Last Year		
	Main			Secondary			Total			Pkgs	Kgs	USC
Sale 37/25	85760	5963845	212	11080	559741	116	96840	6523586	204			
Sale 37/25	79,600	5,529,597	213	12,520	644,237	121	92,120	6,173,834	204	90,065	6,046,760	201
Sale 36/25	81,900	5,717,264	210	12,640	646,656	114	94,540	6,363,920	200	86,539	5,728,801	201
Sale 35/25	81,640	5,683,768	205	13,220	672,047	112	94,860	6,355,815	195	86,195	5,789,936	206
Sale 34/25	85,961	5,980,253	207	13,529	690,944	114	99,490	6,671,197	197	89,800	6,032,073	205
Sale 33/25	88,382	6,155,543	218	12,921	660,887	110	101,303	6,816,430	208	93,659	6,314,733	215

## Average Auction Hammer Prices by Grade and Country

Country of Origin	Current Sale's Prices per Grade										Corresponding Prices per Grade for Last Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Kenya	192	239	207	246	166	136	121	141	111	215	228	241	216	226	114	122	114	123	88	218
Uganda	126	118	107	105	106	104	92	89	90	105	126	106	113	117	90	85	90	81	67	101
Tanzania	-	-	-	-	-	-	-	-	-	-	100	-	127	-	83	89	-	-	-	121
Rwanda	334	324	318	313	265	234	194	188	-	315	289	336	339	291	224	208	202	176	-	308
Burundi	193	212	-	-	130	-	-	-	-	195	198	184	142	-	-	-	-	-	-	188
Zambia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>199</b>	<b>238</b>	<b>203</b>	<b>229</b>	<b>149</b>	<b>121</b>	<b>125</b>	<b>110</b>	<b>95</b>	<b>207</b>	<b>222</b>	<b>236</b>	<b>211</b>	<b>208</b>	<b>137</b>	<b>111</b>	<b>117</b>	<b>109</b>	<b>75</b>	<b>208</b>

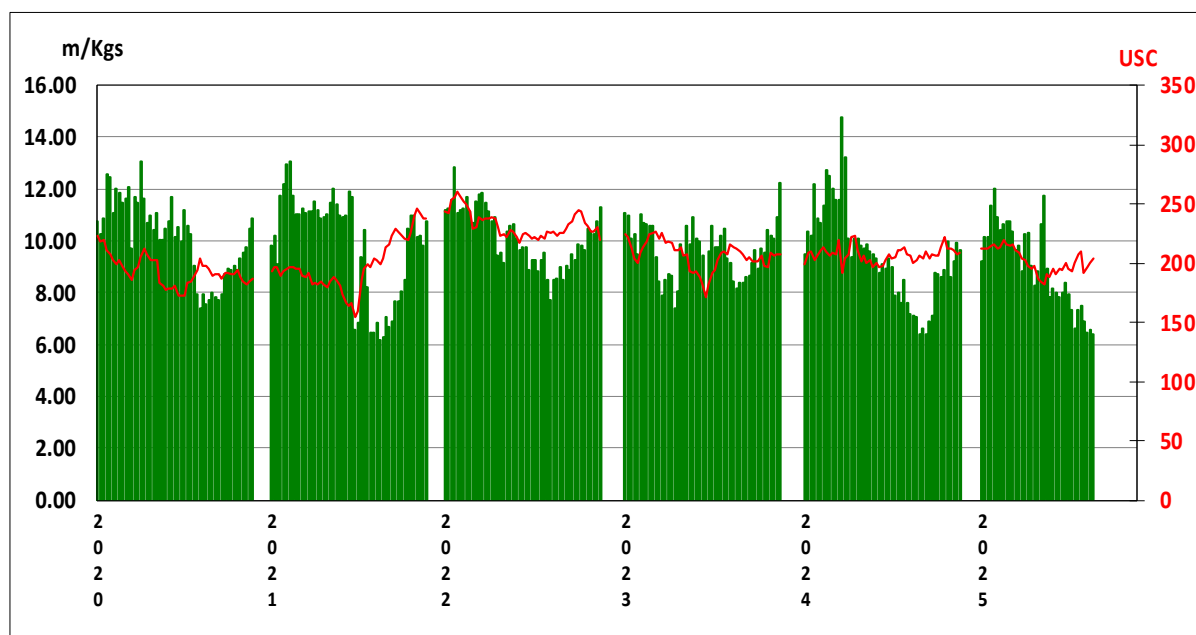
Sale Number	Previous Sale's Prices per Grade										Corresponding Prices per Grade for Previous Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Sale 38/25	197	232	196	219	154	116	129	107	95	204	219	223	203	208	139	108	114	108	72	201
Sale 37/25	198	231	195	214	156	125	128	118	97	204	208	229	193	217	119	111	114	95	71	201
Sale 36/25	209	226	194	200	163	114	123	106	96	200	211	228	198	206	141	106	115	104	74	201
Sale 35/25	200	220	189	200	140	110	120	109	94	195	236	238	200	219	131	112	123	115	75	206
Sale 34/25	202	222	187	207	144	112	124	109	93	197	196	239	208	207	128	106	124	105	65	205
Sale 33/25	202	242	190	205	155	113	118	107	92	208	219	255	212	211	124	100	114	108	65	215



### Average Auction Prices and Quantities by Country

	Previous Sale Sale 38/25		Year To Date 2025		Last Year Sale 38/24		Year To Date 2024		Variance Year To Date	
Country	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC
Kenya	5,423,571	212	278,824,699	211	4,790,028	212	303,553,273	219	(24,728,574)	(8)
Uganda	805,469	103	36,338,281	77	619,975	97	40,101,861	81	(3,763,581)	(4)
Tanzania	-	-	2,342,593	93	128,085	124	3,441,192	77	(1,098,599)	16
Rwanda	389,334	308	21,674,072	182	335,154	323	23,888,674	286	(2,214,602)	(104)
Burundi	160,204	-	1,155,229	125	47,452	192	2,715,841	172	(1,560,612)	(47)
Zambia	-	-	-	-	-	-	-	-	0	0
Malawi	-	-	906,946	95	-	-	-	-	906,946	95
Mozambique	-	-	45,329	75	-	-	-	-	45,329	75
Madagascar	-	-	-	-	-	-	-	-	0	0
Zimbabwe	-	-	-	-	-	-	-	-	0	0
D R Congo	-	-	-	-	-	-	-	-	0	0
Ethiopia	-	-	-	-	-	-	-	-	-	-
Total	6,778,578	-	341,287,149	194	5,920,694	204	373,700,841	207	(32,413,692)	(13)

### Mombasa Weekly Average Auction Quantities and Prices 2020—2025



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
	Kgs USC	Kgs USC	Kgs USC	Kgs USC	Kgs USC	Kgs USC	Kgs USC	Kgs USC	Kgs USC	Kgs USC	Kgs USC	Kgs USC	Kgs USC
2025	40.95 214	43.99 215	41.5 215	48.3 202	39.4 191	40.8 195	31.7 196	28.3 204	26.3 201				341.3 193
2024	53.1 205	47.37 210	49.9 206	52.9 217	39.1 202	36.1 198	43.1 206	30.9 210	27.2 203	37.9 183	36.1 215	28.6 209	473.0 207
2023	51.9 216	42.9 216	36.2 223	33.2 216	47.8 198	40.4 189	46.6 189	39.2 211	33.1 211	45.1 203	39.8 203	33.2 207	489.4 207
2022	46.8 249	45.19 255	57.0 236	44.3 238	49.0 220	40.1 223	37.1 222	44.1 226	34.6 226	35.6 235	50.1 236	32.3 226	516.3 223
2021	40.8 194	49.9 195	55.7 192	44.7 183	45.4 184	56.2 174	34.4 168	38.4 201	26.2 208	30.3 226	51.1 231	30.8 238	503.8 197
2020	44.4 217	47.41 203	56.5 192	46.9 205	42.5 189	53.0 181	42.3 176	34.6 192	39.1 194	33.3 192	36.1 190	40.6 187	516.8 193

## Exchange Rates (2023-2025)



During the week the Kenya Shilling traded between KES 128.00 - 129.50 and reached 127.41 at its lowest end week. Expectations are that the Kenya Shilling against US Dollar will trade at the level of 127.50 - 129.50 in the coming week.

*(These figures are given as a guide and readers are advised not to use them as a basis for business transactions)*

## Auction Quantities

Country Offerings	This Week Sale 39/25		Year To Date 2025		Year To Date 2024 Sale 39/24		Variance Year To Date	
	Packages	Kgs	Packages	Kgs	Packages	Kgs	Packages	Kgs
Kenya	68,540	4,770,399	4,308,349	298,799,558	5,096,735	350,507,559	(788,386)	(51,708,001)
Uganda	15,400	855,262	657,144	36,994,277	704,937	40,140,095	(47,793)	(3,145,818)
Tanzania	0	0	42,379	2,483,830	63,860	3,416,088	(21,481)	(932,258)
Rwanda	6,140	431,368	329,618	23,036,373	354,488	25,347,839	(24,870)	(2,311,466)
Burundi	140	6,052	47,436	2,785,551	51,520	3,088,305	(4,084)	(302,754)
Zambia	0	0	0	0	0	0	0	0
Malawi	0	0	19,838	1,112,085	0	0	19,838	1,112,085
Mozambique	0	0	1,000	46,219	0	0	1,000	46,219
Madagascar	0	0	0	0	0	0	0	0
Zimbabwe	0	0	0	0	0	0	0	0
D R Congo	0	0	0	0	0	0	0	0
Ethiopia	0	0	0	0	0	0	0	0
<b>Total</b>	<b>90,220</b>	<b>6,063,081</b>	<b>5,405,764</b>	<b>365,257,893</b>	<b>6,271,540</b>	<b>422,499,886</b>	<b>(865,776)</b>	<b>(57,241,993)</b>

### Sale 38: Buyer Purchases of Orthodox Teas Offered by Grade (in Packages)

BUYER	%	Total	OPA	OP1	OP	FOP	PEKOE	FBOPF	GFBOP	FBOPFSP	BOP	GBOP	GFOP	FOF	OR
1 GLOBAL TEA & COMMODITIES KENYA LTD.	14.36	420	100	160	20			120				20			
2 COFFTEA AGENCIES LTD	12.31	360	100	60	20	50	50				40	40			
3 UNIWORLD TEAS KENYA LIMITED	9.23	270	20	50				100	20	60		20			
4 ALIBHAI RAMJI (MSA) LTD	6.84	200	100	60		40									
5 MITCHELL COTTS FREIGHT KENYA LIMITED	4.79	140												140	
6 JAMES FINLAY MOMBASA LIMITED	3.42	100	60			20	20								
7 IMPERIAL TEAS (EPZ) LTD	3.42	100	60			20		20							
8 ADITYA BIRLA GLOBAL TRADING (K) LTD	2.74	80						80							
9 EMPIRE KENYA (EPZ) LTD	2.74	80	20	40				20							
10 L.A.B. INTERNATIONAL KENYA LTD	1.37	40		40											
11 MIZAJ AFRICA LTD	1.37	40						20						20	
12 CHAI TRADING COMPANY LTD	0.68	20	20												
13 UNITED (E.A.) WAREHOUSES LTD	0.68	20						20							
<b>Total Sold</b>	<b>63.93</b>	<b>1,870</b>	<b>480</b>	<b>410</b>	<b>40</b>	<b>130</b>	<b>70</b>	<b>380</b>	<b>20</b>	<b>100</b>	<b>40</b>	<b>40</b>	<b>-</b>	<b>160</b>	<b>-</b>
<b>Unsold</b>	<b>36.07</b>	<b>1,055</b>	<b>205</b>	<b>120</b>	<b>10</b>	<b>100</b>	<b>40</b>	<b>340</b>	<b>10</b>	<b>160</b>	<b>0</b>	<b>0</b>	<b>10</b>	<b>20</b>	<b>40</b>
<b>% Unsold</b>			<b>30</b>	<b>23</b>	<b>20</b>	<b>43</b>	<b>36</b>	<b>47</b>	<b>33</b>	<b>62</b>	<b>0</b>	<b>0</b>	<b>100</b>	<b>11</b>	<b>100</b>
<b>Grand Total</b>	<b>100.00</b>	<b>2,925</b>	<b>685</b>	<b>530</b>	<b>50</b>	<b>230</b>	<b>110</b>	<b>720</b>	<b>30</b>	<b>260</b>	<b>40</b>	<b>40</b>	<b>10</b>	<b>180</b>	<b>40</b>

### Buyer Purchases of Teas Offered by Grade (in Packages)

BUYER	%	Total	BP1	PF1	PD	D1	BP2	PF2	D2	FNGS	BMF
1 GLOBAL TEA & COMMODITIES KENYA LTD.	16.91	17,980	2,040	7,240	3,680	1,520		560	1,300	940	700
2 MITCHELL COTTS FREIGHT KENYA LIMITED	13.83	14,700	1,480	6,140	6,960	120					
3 L.A.B. INTERNATIONAL KENYA LTD	5.94	6,320	440	1,880	3,540	240		140	20	60	
4 CHAI TRADING COMPANY LTD	5.42	5,760	2,480	1,880	480	680	20	120	80	20	
5 ADITYA BIRLA GLOBAL TRADING (K) LTD	4.82	5,120	80	1,840	2,000	1,000		80	80	40	
6 JAMES FINLAY MOMBASA LIMITED	4.57	4,860	320	1,040	3,400					100	
7 MOMBASA COFFEE LTD	3.84	4,080	120		2,320	1,320	320				
8 M.J. CLARKE LTD	2.78	2,960		160	1,760	120		280		640	
9 MIZAJ AFRICA LTD	2.52	2,680	380	940	920		300	140			
10 VAN REES KENYA LIMITED	2.39	2,540	1,060	760	240	360	80			40	
11 ABBAS TRADERS LTD	2.09	2,220	120	680	1,160	160		60	20	20	
12 SUMMER LINER CO. LTD	1.45	1,540		80			140	160	100	740	320
13 EMPIRE KENYA (EPZ) LTD	1.32	1,400	200	160	520	120		60	200	140	
14 DEVCHAND KESHAVJI (K) LTD	1.28	1,360		1,360							
15 DELSTA TEA LIMITED	1.24	1,320	1,320								
16 AB EXPORTS KENYA LIMITED	1.22	1,300		800	200	240	60				
17 DRINCO INTERNATIONAL LIMITED	1.17	1,240	800		240	200					
18 AL-EMIR LIMITED	1.07	1,140	40	1,000		80			20		
19 BLACK GOLD AFRICA TRADERS LTD	0.98	1,040	60	160	120	480	60	80	60	20	
20 MABROC EAST AFRICA LIMITED	0.79	840	560	280							
21 GREEN LEAF TRADING CO. LTD	0.66	700									700
22 AFRO ASIAN TEA EPZ LTD	0.64	680	320	280				80			
23 AL KHALIFA ENTERPRISES LTD	0.62	660						40		120	500
24 MAYMUN ENTERPRISES	0.58	620	160	40	120			40		260	
25 LULA TRADING COMPANY	0.47	500			80		40	60		260	60
26 ALIBHAI RAMJI (MSA) LTD	0.41	440	40	320		80					
27 AIMCO ENTERPRISES LTD	0.34	360							20	140	200
28 COFFTEA AGENCIES LTD	0.34	360			360						
29 STANSAND (A) LTD	0.34	360	40	240	80						
30 JALEEL TRADING COMPANY	0.26	280									280
31 LINDOP & COMPANY (KENYA ) LTD	0.26	280		280							
32 IMPERIAL TEAS (EPZ) LTD	0.23	240	160			40			40		
33 MCLEOD RUSSEL AFRICA LIMITED	0.19	200			80	120					
34 TANZIL TRADING LIMITED	0.19	200						40		120	40
35 AFRO TEAS LTD	0.15	160	120			40					
36 MAISHA COMMODITIES	0.13	140		40		40			60		
37 SHAKAB IMPORTS EXPORTS CO. LTD	0.11	120		120							
38 SARDIA INTERNATIONAL CO. LTD	0.09	100							20	40	40
39 TEAVANA TEA STORE LTD	0.09	100									100
40 ABSS Trading Ltd	0.08	80		40	40						
41 CAPITAL TEA TRADERS	0.06	60									60
42 WASO TEA ENTERPRISE LTD	0.06	60					40				20
43 TUSHA TEA LTD	0.04	40		40							
44 AL MAJANI GOLD AND KAHAWA LTD	0.02	20							20		
45 AXIS TEA & SERVICES LIMITED	0.02	20							20		
46 LUTEX LIMITED	0.02	20					20				
47 TROPICAL CROPS & COMMODITIES	0.02	20								20	
Total Sold	82.03	87,220	12,340	27,800	28,300	6,960	1,080	1,940	2,060	3,720	3,020
Unsold	17.97	19,101	4,420	6,120	4,880	3,041	60	100	160	240	80
% Unsold			26	18	15	30	5	5	7	6	3
Grand Total	100.00	106,321	16,760	33,920	33,180	10,001	1,140	2,040	2,220	3,960	3,100
Sale 37/25	85.75%	96,840	12,400	35,200	31,280	6,880	1,060	1,820	1,980	3,080	3,140
Sale 36/25	78.02%	94,540	9,560	36,520	28,220	7,600	1,000	2,040	2,480	3,960	3,140
Sale 35/25	75.87%	94,860	10,440	36,700	27,040	7,460	1,360	1,960	2,500	4,040	3,360
Sale 34/25	65.41%	99,490	10,240	39,841	27,480	8,400	1,430	2,360	2,620	3,719	3,400
Sale 33/25	66.80%	101,303	8,320	44,620	26,802	8,640	960	2,080	2,500	3,780	3,601
Sale 32/25	67.95%	103,400	10,480	44,360	25,640	7,920	1,240	2,740	2,440	4,320	4,260

## Other Tea Auction Centres

**Colombo:** at Sale 37 of 23rd and 24th September, 2025, with 5.1m kgs. 0.7Mkg of Ex-Estate teas on offer met with fair demand. Select best Western High Grown BOPs were irregularly lower with the below best and plainer varieties declining from last week's levels. Select best Western High Grown BOPFs eased from last week's levels with only a few invoices obtaining attractive prices following special inquiry, the below best and plainer sorts barely maintained and were irregularly lower. Nuwara Eliya BOPs barely maintained, the BOPFs were firm. Uda Pussellawa BOPs were firm to marginally dearer, the BOPFs were firm to irregularly dearer. Selected invoices of Uva BOPs gained marginally, while the others declined, the BOPF were firm to marginally dearer. Low Grown CTC BP1s were dearer, the High and Medium sorts were tending irregular. Low Grown CTC PF1s appreciated as the sale progressed, the High and Medium sorts were tending irregular. The 2.2Mkg of Low Grown teas on offer met with irregular demand. In the Leafy segment, well-made OPs / OPAs maintained last levels, whilst the best types met with irregular demand. Select best OP1s were firm, others were mostly lower. Well-made BOP1s were firm to lower, the below best along with the bolder types were irregular. Well-made PEKOE1s were easier, others were firm. Bold PEKOE1s were easier. In the Small Leaf segment, well-made FBOPs were easier, others were irregular following quality. Select best and best FBOPF1s were firm to marginally lower, the rest were irregular following quality. BOPF.SP, BOPF, BOP.SP and BOPs were firm. FBOPF varieties in general were lower to last. Premium Flowery teas were irregularly lower. Turkey, Russia and the C.I.S countries lent fair support. Libya and Iraq were active.

**Chittagong:** at Sale 20 of 22nd September, 2025. CTC LEAF: 53,064 packages of tea on offer met with an improved demand. BROKENS: Well made good liquoring Brokens met with a strong demand and were a dearer market following competition. Medium varieties met with a fairly good demand and were generally firm. Plainer varieties met with a fair demand at around last levels with some withdrawals. BLF teas met with less demand at easier rates with more withdrawals. FANNINGS: Good liquoring Fannings met with a strong market and were generally dearer

following quality. Medium varieties were a fairly good market and were generally firm. Plainer varieties met with a fair demand at around last levels. There were a few withdrawals in this category. BLF teas met with less demand at easier rates with more withdrawals. DUST: 10,537 packages of tea on offer met with a good demand. Good liquoring Dusts sold well at around last levels. Mediums met with a better demand and were fully firm to slightly dearer closely following quality. Plain and BLF Dusts were an easier market and witnessed more withdrawals. Blenders lent good support with fair interest from the Loose tea buyers. COMMENTS: This week demand emanated from all sections of the market resulting in more competition particularly for the better liquoring varieties. Blenders were more active with improved support from the Loose tea buyers. Reprinted teas, however, continued to meet with heavy withdrawals. Dusts were a slightly dearer market.

**Cochin:** at Sale 39 of 24th September, 2025. CTC Leaf: Good Demand: All grades irregular around last. Buying pattern: Up country buyers operated. ORTHODOX Leaf: Good Demand. High grown and other whole leaf grades sold steady to dearer levels depending on quality. Primary brokens appreciated in prices 3-4c at times more on quality. Secondary brokens irregular around last levels. Fannings fully firm. Buying pattern: CIS and Middle East Buyers operated. Dust : Good Demand. Popular marks and better medium sorts fetched prices at fully firm levels to occasionally dearer 2-3c. Plainer sorts firm. Buying pattern: Major packeteers, exporters active. Internal operated

## Auction Offerings

	Week 38	Week 39	Week 40	Week 41
Centre	23-Sep	30-Sep	07-Oct	14-Oct
Mombasa	111,420	106,161	149,133	-
Limbe				
Colombo				
Calcutta	228,702			
Guwahati	205,003	-	-	-
Chittagong				
<b>Total</b>	<b>369,662</b>	<b>288,994</b>	<b>111,420</b>	<b>-</b>

**Calcutta:** at Sale 38 of 16th, 17th and 18th September 2025 with 228,702 packages of tea on offer. Market description: There was good demand. Good liquoring Assams met with demand and sold around last levels. Medium Assams were barely steady. Better Dooars were irregular and sold around last to easier levels. Good Dooars sold around last levels following the quality. Plainer Dooars continued to struggle. Dust: Good Demand. Overall it was an easier market for all sorts. Western India buyers and Hindustan Unilever were active in both segments, primarily on brighter liquoring Assams. M/s Tata Consumer Product Limited showed some interest on plainer Dooars and were active on Dust category. Local buyers operated on grainy, clean teas. Exporters operated on bolder broken

**Guwahati:** at Sale 39 of 23rd September, 2025, with 181,573 packages of tea on offer. Market: CTC There was good demand for the good and better medium Assams at firm to occasionally dearer rates. Demand was fair for the remainder at irregular and easier rates following quality. Plainer sorts witnessed significant withdrawals. Buying Pattern: CTC. There was fair support from HUL / Western India buyers. TCPL, North India, other packeteers operated. There was improved export enquiry on the larger brokens. Market: DUST There was good demand for the better liquoring dusts at around last levels. Remainder met with fair demand at irregular and easier rates following quality and witnessed some withdrawals. Buying Pattern: DUST There was fair enquiry from HUL / TCPL. Western India, other packeteers operated.



## Regional Weather Conditions and World Crop

**Kenya: Muranga:** The area experienced sunny intervals during the day with light showers at night. The rainfall recorded during the week was **3 mm** in 1 wet day. Cool temperatures were recorded, maximum 26°C and minimum 10°C. Crop intake was at an average of 103.24 tonnes/day on a six days plucking cycle.

**Nyeri:** The week was sunny. The rainfall recorded was **13.12mm** recorded in 1 day. The highest and lowest temperatures were 23°C & 12°C respectively.

Crop intake averaged 35.83 tonnes /day on a six days plucking cycle.

**Meru:** The weather was sunny and cloudy throughout the week. The rainfall recorded was **9mm** during the week. The average temperatures recorded were highs and lows of 27°C and 15°C respectively. Crop intake averaged 34.38 tonnes/day on a five day plucking cycle.

**Kericho:**

The week was partly sunny in the morning, followed by cloudy afternoon accompanied by reduced showers. A total of **37.3mm** rainfall was recorded. Average temperatures were highs of 23°C and lows of 11°C. Crop intake went down by 10% compared to previous week's volumes. Crop on offer low but steady.

**Uganda:** There was some rainfall reported across most tea growing regions. Fort portal recorded **36mm**, Bushenyi recorded **3mm**, Hoima record-



*The trouble with weather forecasting is that it is right too often for us to ignore it and wrong too often for us to rely on it.*

ed **19mm** of rainfall and Kibale recorded **30mm** of rainfall. Average temperatures were highs of 30°C and lows of 16°C. Crop levels are low.

**Seven-day weather forecast for 30th September to 6th October 2025.**

Most parts of the country are likely to be sunny and dry.

Rainfall is expected in some parts of the Highlands East and West of the Rift Valley, the Lake Victoria Basin, the Rift Valley and North-western Kenya. Isolated heavy rainfall events may occur over some parts of these regions.

**Highlands East of the Rift valley.**

[including, Nairobi County] (Nyandarua, Laikipia, Nyeri, Kirinyaga, Murang'a, Kiambu, Meru, Embu, Tharaka )

Occasional cloudiness is expected in the mornings giving way to sunny intervals. Afternoon showers are likely to occur over few places during the first half of the forecast period increasing to several

places thereafter. Nights are expected to be partly cloudy though showers may occur over few places.

**Highlands West of the rift valley.**

The Lake Victoria Basin, and the Rift Valley (Siaya, Kisumu, Homabay, Migori, Kisii, Nyamira, Trans Nzoia, Baringo, Uasin Gishu, Elgeyo-Marakwet, Nandi, Nakuru, Narok, Kericho, Bomet, Kakamega, Vihiga, Bungoma, Busia and West Pokot Counties)

Morning rains are likely to occur over few places. Afternoon showers and thunderstorms are expected over several places. Nights showers are likely to occur over few places occasionally spreading to several places.

**The Coast:**

(Mombasa, Kilifi, Lamu and Kwale Counties as well as the coastal parts of Tana River County)

Sunny intervals are expected during the day while nights are likely to be partly cloudy. However, there is a possibility of morning showers occurring over few places.

**Kenya:**

Estates and private tea farms continue to recover from the effects of the Hail Damage in parts of Nandi Hills, Kapsabet area, Kericho and Bomet which had been severely hit by hailstorms and as a result the crop on offer will continue to drop in the coming weeks.

**Uganda:** Crop levels are low.

World Production from Main Producing Countries over the Past Twelve Months															Production over calendar years	
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	+ / -	2024	2023
	Variance															
Bangladesh	0.3	0.2	1.3	2.3	8.6	9.8	13.5	13.8	12.2	14.9	10.0	6.4	36.1	(72.0)	86.8	83.4
North India	0.1	11.0	52.1	73.0	104.4	112.5	151.4	183.0	141.6	174.4	123.5	11.1	504.4	(694.0)	1,044.0	1,131.8
South India	17.0	14.8	15.7	22.2	26.2	21.0	20.4	18.7	23.0	24.2	19.8	18.3	137.3	(109.0)	225.9	236.0
Sri Lanka	21.5	15.6	24.4	26.4	25.3	21.6	21.4	21.3	24.1	21.1	22.3	21.7	156.2	(126.0)	260.6	253.9
Kenya	54.4	44.6	37.9	51.8	52.1	42.4	39.0	38.6	42.4	50.2	41.4	55.8	322.3	(316.0)	596.9	570.2
Uganda	4.1	6.0	1.9	3.3	2.6	2.1	1.3	4.5	6.0	7.6	6.6	6.7	21.3	0.0	18.8	0.0
Tanzania	1.9	1.9	1.9	1.8	1.6	1.0	1.9	0.6	0.8	0.0	2.2	2.0	5.7	(4.0)	13.3	22.9
Rwanda	4.2	3.6	3.9	3.6	3.8	3.2	2.9	1.2	1.1	2.1	3.7	3.3	25.2	(16.0)	38.2	38.1
Malawi	5.3	6.7	6.1	6.8	4.4	2.1	1.4	1.4	2.6	2.6	3.2	4.0	34.4	(18.0)	45.8	43.4
<b>Total</b>	<b>104.6</b>	<b>98.4</b>	<b>143.3</b>	<b>186.1</b>	<b>224.9</b>	<b>212.7</b>	<b>250.0</b>	<b>1.4</b>	<b>205.4</b>	<b>237.2</b>	<b>32.3</b>	<b>58.4</b>	<b>1,863.1</b>	<b>(1,355)</b>	<b>2,330.4</b>	<b>2,379.6</b>
<b>Variance</b>	<b>107.3</b>	<b>106.4</b>	<b>152.7</b>	<b>9.0</b>	<b>219.8</b>	<b>182.3</b>	<b>233.1</b>	<b>(8.8)</b>	<b>226.8</b>	<b>28.8</b>	<b>(16.6)</b>	<b>(50.2)</b>	<b>682.4</b>			

Monthly figures in "BLACK" are for 2025 whilst figures in "BLUE" are for 2024

## Mombasa Auction—Weekly Sale Average Prices (All teas) 2025

Sale Nos.	Sale Date	Kilos sold Weekly	Kilos Sold monthly	Year : 2024 Av. Price US\$ weekly	Year : 2025 Av. Price US\$ monthly	Year : 2024 Av. Price US\$ monthly	Year : 2023 Av. Price US\$ monthly
1	06-Jan-25	9,226,607		2.12			
2	13-Jan-25	10,167,646		2.12			
3	21-Jan-25	10,199,875		2.17			
4	27-Jan-25	11,370,562	40,954,690	2.15	2.14	2.05	2.16
5	03-Feb-25	11,995,472		2.16			
6	10-Feb-25	10,906,410		2.12			
7	17-Feb-25	10,431,210		2.13			
8	24-Feb-25	10,665,450	43,998,542	2.19	2.15	2.10	2.16
9	03-Mar-25	10,745,502		2.16			
10	10-Mar-25	10,773,185		2.16			
11	17-Mar-25	10,376,206		2.15			
12	25-Mar-25	9,640,081	41,534,974	2.11	2.15	2.06	2.23
3 mths Totals:					\$2.11 126,488,206.80	\$2.07 150,354,861 Kgs	\$2.17 131,008,319 Kgs
13	01-Apr-25	9,837,565		2.09			
14	07-Apr-25	8,804,801		2.04			
15	15-Apr-25	10,268,638		2.03			
16	22-Apr-25	10,312,102		1.98			
17	28-Apr-25	9,063,226	48,286,332	1.95	2.02	2.17	2.16
18	05-May-25	8,262,512		1.98			
19	12-May-25	8,760,431		2.06			
20	19-May-25	10,622,325		1.84			
21	27-May-25	11,763,532	39,408,800	1.82	1.91	2.02	1.98
22	03-Jun-25	8,954,817		1.91			
23	09-Jun-25	7,842,393		1.88			
24	16-Jun-25	8,139,282		1.95			
25	23-Jun-25	7,978,364		1.97			
26	30-Jun-25	7,842,583	40,757,439	1.95	1.93	1.98	1.89
6 mths Totals:					\$1.95 254,940,777	\$2.07 278,914,780	\$2.11 252,422,587
27	07-Jul-25	8,008,246		1.95			
28	14-Jul-25	8,387,715		2.00			
29	21-Jul-25	7,919,652		1.95			
30	28-Jul-25	7,336,178	31,651,791	1.93	1.96	2.06	1.89
31	04-Aug-25	6,600,626		2.00			
32	11-Aug-25	7,336,201		2.08			
33	18-Aug-25	7,609,016		2.10			
34	25-Aug-25	6,903,022	28,348,865	1.97	2.04	2.10	2.11
35	01-Sep-25	6,646,309		1.96			
36	08-Sep-25	6,569,733		2.00			
37	15-Sep-25	6,387,163		2.04			
38	22-Sep-25	6,742,511	26,345,716	2.04		2.03	2.11
9 mths Totals:						\$2.07 380,119,188.50	371,409,176.60
40							
41							
42							
43						1.98	2.03
44							
45							
46							
47						2.15	2.03
48							
49							
50						2.09	2.07
51							
Sale Nos. 1 to 51						482,856,000 KGS	489,535,348.1 KGS
Year end Totals :						\$2.07	\$2.07

## Summary : Sale Averages by Country

Year : 2025			Year : 2024		
Sale Nos: 1 to 34 (8 month)			Sale Nos: 1 to 35 (8 month)		
Country :	Kilos ' 000	Av. Prc US\$	Country :	Kilos ' 000	Av. Prc US\$
Kenya	257,413,150	2.12	Kenya	286,369,117	2.20
Uganda	33,180,185	0.71	Uganda	37,980,861	0.80
Tanzania	2,335,486	0.92	Tanzania	3,285,710	0.75
Rwanda	20,004,226	1.61	Rwanda	22,787,612	2.84
Burundi	1,056,101	1.15	Burundi	2,487,267	1.73
Malawi	908,946	0.95	Malawi		
Mozambique	45,329	0.75	Mozambique		
D R Congo			D R Congo		
Madagascar			Madagascar		
Ethiopia			Ethiopia		
Total :	314,941,423	1.92		352,911,466	2.07

Year 2024 : 12M	482,856	2.07
Year 2023 : 12M	489,535	2.07
Year 2022 : 12M	516,338	2.33
Year 2021 : 12M	503,893	1.97
Year 2020 : 12M	516,803	1.93
Year 2019 : 12M	454,013	2.04
Year 2018 : 12M	459,361	2.43
Year 2017 : 12M	397,646	2.81
Year 2016 : 12M	407,989	2.29