

NATIONAL BROKERS LIMITED

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TEA MARKET REPORT – Sale 46 held on Monday 24th March, 2025

CTC LEAF: 44,759 packages of tea met a restricted demand.

BROKENS/FANNINGS: A handful of clean liquoring teas on offer met with a fairly good demand and sold at around last levels. All other varieties witnessed much less demand and were subjected to heavy withdrawals. BLF teas were again difficult of sale and withdrawals were heavier.

DUST: 2,965 packages of tea on offer met with a fair demand. A select few clean liquoring Dusts sold well at slightly easier rates. Remainder, mostly reprinted saw only limited demand with heavy withdrawals. Blenders lent fair support with improved interest from the loose tea buyers.

COMMENTS: This week’s sale witnessed a much weaker demand with only a few buyers operating in the sale. A few clean lines sold quite well but the remainder were withdrawn without any bids. The only interest in this sale emanated from a few Blenders.

Dusts sold well.

Our Catalogue: (Sale 46) Avg : Tk 170.00, Sold 21.53% ,
(Sale 45) Avg : Tk 182.55, Sold 41.69%

Quotations – This Week – (In Taka)

| Brokens | This Week | Last Week | Fannings | This week | Last Week | Dust | This week | Last Week |
|---------|-------------|-------------|----------|-------------|-------------|------|-----------|-----------|
| Best | 210-220 nom | 215-225 nom | Best | 210-220 nom | 215-225 nom | PD | 175-225 | 165-238 |
| Good | 190-200 nom | 200-210 nom | Good | 190-200 nom | 200-210 nom | RD | 160-225 | 160-269 |
| Medium | 170-180 | 170-180 | Medium | 170-180 | 170-180 | D | 200-260 | 160-260 |
| Plain | 160-165 | 160-165 | Plain | 160-165 | 160-165 | CD | 330 | 225-288 |
| BLF | 160 nom | 160 nom | BLF | 160 nom | 160 nom | BLF | 160 | 160 |

Exchange Rates 24th March, 2025 Sterling Pound 156.3683 Dollar: Tk. 121.0000
Top Prices – This Week

| Category – CTC | Garden | Grade | Package | Price | Buyer(s) |
|-----------------|------------|---------|---------|-------|----------------|
| Brokens | Ghazipore | GBOP | 20 | 227/- | Ispahani |
| Fannings | Ghazipore | OF | 90 | 220/- | Ispahani |
| Clonal Brokens | Neptune | GBOP | 20 | 230/- | SST / Ispahani |
| Clonal Fannings | Neptune | OF | 30 | 220/- | AKT/Mintu |
| RD/PD | Ghazipore | RD/PD | 30 | 225/- | HRC/Ispahani |
| Clonal RD/PD . | Neptune | RD/PD | 20 | 225/- | HRC |
| D (incl.Clone) | * Madhupur | D(BT1) | 10 | 260/- | LC |
| CD (incl.Clone) | * Madhupur | CD(BT1) | 10 | 330/- | Pop(D) |

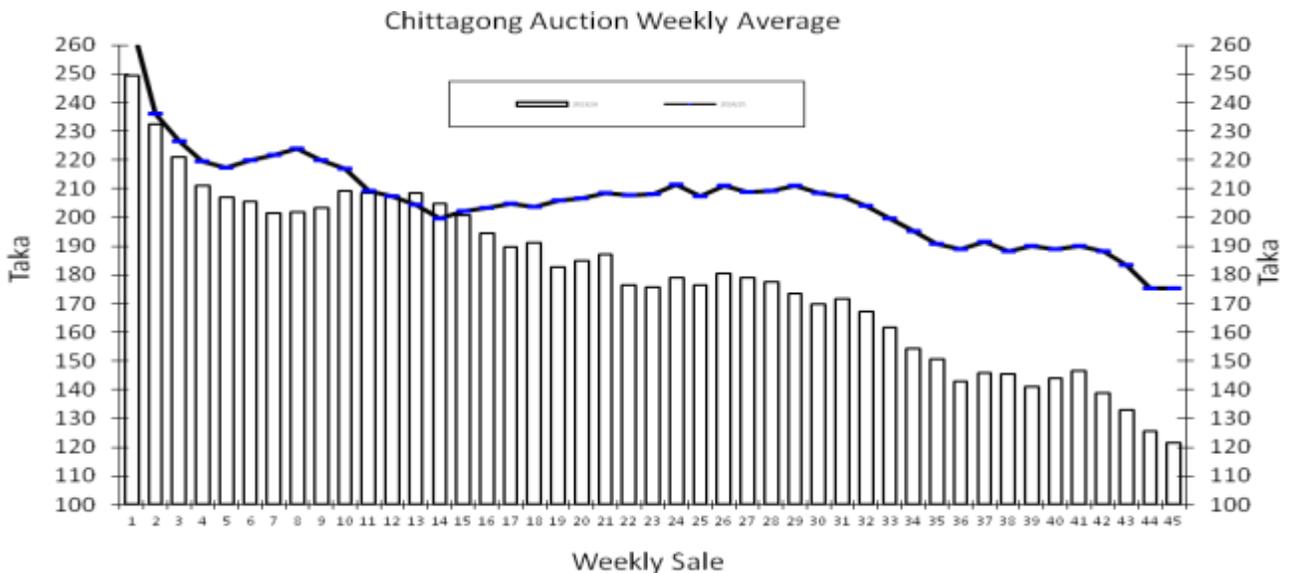
* Above price(s) realised in our catalogue

Offerings

| Type | This Sale (Sale 46) | | | | Next Sale (Sale 47) | | | |
|--------------|---------------------|--------------------|----------------|--------------------|---------------------|--------------------|----------------|--------------------|
| | Season 2024-25 | | Season 2023-24 | | Season 2024-25 | | Season 2023-24 | |
| | Packages | Qty/Kg | Packages | Qty/Kg | Packages | Qty/Kg | Packages | Qty/Kg |
| Leaf | 44,759 | 2,233,474.1 | 40,164 | 2,004,183.6 | 34,541 | 1,723,595.9 | 31,143 | 2,004,183.6 |
| Dust | 2,965 | 147,953.5 | 10,032 | 500,596.8 | 2,350 | 117,265.0 | 10,865 | 500,596.8 |
| Total | 47,724 | 2,381,427.6 | 50,196 | 2,504,780.4 | 36,891 | 1,840,860.9 | 42,008 | 2,504,780.4 |

Chittagong Auction Average - Sale 45

(Season 2024/25): Tk 175.21 & (Season 2023/24): Tk 121.51 & (Season 2022/23) :Tk 103.79



Quantities of Teas Sold & Average Prices Realised

| Category | For the Sale | | | | | | Up-to-Date Sale | | | | | |
|------------|----------------|--------|----------------|---------|----------------|--------|-----------------|--------------|----------------------|----------|--------------|-----------|
| | Season 2023/24 | | Season 2024/25 | | Season 2023/24 | | Season 2024/25 | | (+/-) Season 2023/24 | | | |
| | Qty. (Kg) | Taka | Qty. (Kg) | Taka | Qty. (Kg) | (%) | Taka | Qty. (Kg) | (%) | Taka | Qty. (Kg) | Taka |
| CTC LEAF | 980,245.5 | 111.90 | 671,931.3 | 171.69 | 71,244,042.0 | 77.5% | 171.33 | 63,767,131.7 | 79.45% | 201.84 | -7,476,910.3 | 30.51 |
| CTC DUST | 352,624.4 | 142.63 | 183,767.1 | 192.10 | 18,620,721.9 | 22.5% | 196.15 | 16,825,806.3 | 20.28% | 219.27 | -1,794,915.6 | 23.12 |
| Sub-Total | 1,332,869.9 | 121.51 | 855,698.4 | 176.07 | 89,864,763.9 | 99.9% | 176.46 | 80,592,938.0 | 99.73% | 205.48 | -9,271,825.9 | 29.02 |
| Orthodox | 0.0 | 0.00 | 0.0 | 0.00 | 499.0 | 0.0% | 850.00 | 406.1 | 0.00% | 1,088.50 | -92.9 | 238.50 |
| Total | 1,332,869.9 | 121.51 | 855,698.4 | 176.07 | 89,865,262.9 | 99.9% | 176.46 | 80,593,344.2 | 99.73% | 205.48 | -9,271,918.8 | 29.02 |
| Green Tea | 0.0 | 0.00 | 62.4 | 1403.85 | 3,887.7 | 0.0% | 749.37 | 13,140.3 | 0.00% | 664.97 | 9,252.6 | -84.40 |
| Olong Tea | 0.0 | 0.00 | 0.0 | 0.00 | 7.0 | 0.0% | 1,250.00 | 0.0 | 0.00% | 0.00 | -7.0 | -1,250.00 |
| Yellow Tea | 0.0 | 0.00 | 0.0 | 0.00 | 20.5 | 0.0% | 1,250.00 | 49.1 | 0.00% | 1,228.71 | 28.6 | -21.29 |
| White Tea | 0.0 | 0.00 | 0.0 | 0.00 | 0.0 | 0.0% | 0.00 | 2.0 | 0.00% | 2,703.00 | 2.0 | 2,703.00 |
| Total | 1,332,869.9 | 121.51 | 855,760.8 | 176.16 | 89,869,178.1 | 99.9% | 176.49 | 80,606,535.6 | 99.74% | 205.56 | -9,262,642.6 | 29.07 |
| Other (s) | 495.5 | 80.80 | 16,886.5 | 126.70 | 216,705.4 | 0.1% | 116.51 | 760,630.6 | 0.26% | 126.74 | 543,925.2 | 10.23 |
| G.Total | 1,333,365.4 | 121.49 | 872,647.3 | 175.21 | 90,085,883.5 | 100.0% | 176.35 | 81,367,166.2 | 100% | 204.82 | -8,718,717.4 | 28.47 |

Buyer Purchase Analysis

| Buyer | For the Sale | | | | | | Up-to-Date Sale | | | | | |
|-------------|----------------|--------|----------------|--------|----------------|--------|-----------------|--------------|----------------------|--------|--------------|-------|
| | Season 2023/24 | | Season 2024/25 | | Season 2023/24 | | Season 2024/25 | | (+/-) Season 2023/24 | | | |
| | Qty. (Kg) | Taka | Qty. (Kg) | Taka | Qty. (Kg) | (%) | Taka | Qty. (Kg) | (%) | Taka | Qty. (Kg) | Taka |
| Export | 70,522.0 | 71.50 | 0.0 | 0.00 | 483,089.7 | 0.02% | 82.68 | 64,054.0 | 0.27% | 178.59 | -419,035.7 | 95.91 |
| Internal | 1,262,843.4 | 124.29 | 872,647.3 | 175.21 | 89,602,793.8 | 99.98% | 176.86 | 81,303,112.2 | 99.73% | 204.84 | -8,299,681.7 | 27.99 |
| Grand Total | 1,333,365.40 | 121.49 | 872,647.3 | 175.21 | 90,085,883.5 | 100% | 176.35 | 81,367,166.2 | 100% | 204.82 | -8,718,717.4 | 28.47 |

Crop of Major Tea Producing & Exporting Countries

| Country | Month | For the Month | | | | Up to Month | | | |
|-------------|----------|---------------|-------|-------|------------|-------------|---------|----------|------------|
| | | 2022 | 2023 | 2024 | (+/-) 2023 | 2022 | 2023 | 2024 | (+/-) 2023 |
| Bangladesh | December | 7.78 | 7.79 | 6.37 | -1.4 | 93.83 | 102.95 | 93.04 | -9.91 |
| North India | December | 48.0 | 66.27 | 11.09 | -55.2 | 1110.4 | 1,157.0 | 1,057.98 | -99.00 |
| South India | December | 14.4 | 18.12 | 18.30 | 0.2 | 230.1 | 236.68 | 226.8 | -9.88 |
| All India | December | 65.8 | 84.39 | 29.39 | -55.0 | 1340.5 | 1393.66 | 1284.78 | -108.88 |
| Sri Lanka | December | 19.5 | 19.80 | 21.71 | 1.9 | 251.5 | 256.04 | 262.15 | 6.11 |
| Kenya | August | 35.9 | 45.57 | 38.62 | -7.0 | 340.1 | 363.9 | 402.75 | 38.84 |

Source: Bangladesh Tea Board and International Tea Committee's Monthly Statistical Bulletin

OTHER MARKETS

KOLKATA SALE 12- 18TH MARCH, 2025

This week market opened with fair demand. Old season teas were irregular and sold at easier rates compared to previous sale. Select new season teas fetched steady prices following the quality. Dust: There was good demand and sold irregularly around last levels to easier levels. Mainly Local buyers were operating on new season dooars teas. Tata consumer Product Limited operated on new season dooars teas. Western India buyers operated on old season teas.

COONOOR SALE 12- 21ST MARCH, 2025

DEMAND: - Good demand. ARKET: - The total CTC leaf teas sold this week was 88.82 (807833.91kgs) of the total offering of 909543.06Kgs. BEST:- Good demand with prices following closely on quality and competition with levels being erratic. Regional packagers were active along with local buyers. GOOD:- Selective demand on this category and prices continuing to be irregular and easier. There was no Fanning grade on offer in this category once again. Regional packagers, upcountry buyers were very selective once again and continued to be price sensitive. BETTER MEDIUM :- Fair demand on this category at easier price levels. Prices at the lower end of this category continue to see a decline by Rs 2 to 3. Larger quantum of teas in this category continue to sell at price levels of the medium category teas and were no disparity in levels. Major blenders continued to be very choosy and price sensitive. The upcountry and local buyers being fairly active. Exporters were selective .MEDIUM:- Good demand with prices ruling at barely steady to easier levels. Major blenders were fairly active along with fair participation from the up country buyers. Exporters were fairly active. PLAINERS:- Good demand with larger broken at barely steady to easier prices. All other sorts in this category sold at steady to easier by Rs 1 to 2. Exporters were active on the larger and select medium broken. Major blenders and internal buyers were selective along with the upcountry buyers. BUYING PATTERN: - The major blenders off take was 44.29% of the total CTC leaf sold.

| CTC Leaf(USC/KG) | Best | Good | Better Medium | Medium | Plain |
|------------------|---------|---------|---------------|---------|---------|
| Larger Brokens | 189-205 | 142-182 | 130-141 | 126-129 | 118-125 |
| Medium Brokens | 215-258 | 144-175 | 133-140 | 129-136 | 126-128 |
| Smaller Brokens | 221-250 | 161-197 | 133-147 | 128-136 | 123-127 |
| Fannings | 221-257 | NA | 136-151 | 128-138 | 125-127 |

SILIGURI SALE 12- 19TH MARCH, 2025

LEAF & DUST: Fair general demand. Levels for Estate marks opened lower to last year by Rs.20-30. Larger weight of plainer sorts met with lesser enquiry at irregular levels and faced withdrawals. Buying Pattern: Internal & Blenders- Operated.

| Quotations (USC/KG) | Brokens(USC/kg) | Fannings(USC/kg) | Dust (USC/kg) |
|-----------------------|-----------------|------------------|---------------|
| Good / Best | 372-477 | 361-483 | 337-431 |
| Medium/ Better Medium | 268-361 | 244-349 | 209-256 |
| Common / BLF | 151-233 | 140-221 | 140-186 |

MOMBASA SALE 11- 17TH & 18TH MARCH, 2025

Good general demand prevailed for the 192,918 packages (12,990,392.00 kilos) available in the market with 26.67% remaining unsold.

| CTC QUOTATIONS | BP1 – (USC/kg) | PF1 – (USC/kg) | PD – (USC/kg) | D1 – (USC/kg) |
|----------------------|----------------|----------------|---------------|---------------|
| Best | 267 – 334 | 296 – 404 | 270 – 374 | 267 – 352 |
| Good | 264 – 328 | 272 – 324 | 267 – 300 | 260 – 303 |
| Good Medium | 224 – 290 | 274 – 318 | 260 – 320 | 260 – 304 |
| Medium (KTDA) | 144 – 205 | 148 – 274 | 142 – 264 | 140 – 258 |
| Medium (Plantations) | 140 – 196 | 146 – 210 | 178 – 255 | 175 – 205 |
| Lower Medium | 130 – 151 | 122 – 165 | 117 – 182 | 122 – 172 |
| Plainer | 096 – 135 | 081 – 133 | 090 – 146 | 090 – 139 |