



CTCS
Culinary Taste Carrier Systems

Market report May 2025

Thyme

Moroccan thyme remains in short supply due to drought and restricted permits. Only two collection permits were issued in 2024, and the situation is expected to persist in 2025. Demand remains steady, particularly for organic and sustainable variants.

In Egypt, new plantations are emerging, offering hope for a stable supply. However, if extreme heat returns, output could again suffer. Turkish and Polish thyme remain marginal sources. Overall, the market is tight, and prices are likely to remain stable to firm in the near term.

Rosemary

Rosemary supply is highly constrained due to continued drought in Morocco. The 2024 harvest saw a 25% decline, and the Moroccan government reduced collection permits significantly. No carryover is available, and demand from both culinary and extraction sectors is strong.

The 2025 harvest is delayed by one month. While weather has slightly improved, conditions are still 40% below normal. Prices rose 30–35% in 2024 and are expected to increase again. Early coverage is strongly advised as shortages are anticipated.

Oregano

Oregano availability remains limited as stocks from the 2024 crop are nearly exhausted. Turkish oregano production decreased significantly, and no carryover is expected into the 2025 season. Fields located above 1,000 meters suffered frost damage after sprouting, reducing potential yields.

While new growth is observed, the shortened maturation period increases the likelihood of lower output. Prices are firm and expected to remain so in the short term. Buyers are advised to plan early, as demand remains strong and new harvests may not fully cover global requirements.



Cumin

India's cumin crop for 2025 is down by 13–17%, mainly due to farmers switching to more profitable crops like wheat and mustard. However, carryover from the previous year has balanced out demand, and prices are expected to remain stable.

In Turkey and Syria, acreage has increased, and better yields are expected this season. Still, the lack of carryover and EU pesticide compliance concerns persist. Indian IPM cumin remains limited and trades at a premium. The market outlook is stable with selective tightness in clean and compliant grades.

Questions about the market?

We are happy to help!

Ambachtstraat 46, 5804 CD Venray
The Netherlands, www.ctcs.de



Turmeric

Turmeric prices are holding firm despite an increase in planted acreage across India. Recent harvests have shown good quality, but the supply of dried turmeric remains limited as more farmers prefer to sell fresh roots due to better prices.

In Maharashtra, yields dropped by about 15%, although the state still accounts for a quarter of India's turmeric output. Stable market demand and strong quality are maintaining price levels. Future pricing will depend on domestic buying trends and international inquiries. Short-term expectations suggest continued firmness in prices with a potential rise if demand strengthens.



Garlic

Garlic production in China is forecasted to exceed 2024 levels due to increased acreage and favorable weather. Although around 300,000 MT of garlic flakes remain in the market, most are older stock and not suitable for export-grade dehydration.

Fresh garlic prices are low, which incentivizes more dehydration this season. Export demand remains strong, especially since 90% of global dehydrated garlic comes from China. Indian garlic prices have stabilized, and manufacturers are working to match Chinese quality. Overall, prices are softening but may recover depending on demand trends and tariff dynamics.



CTCS

Culinary Taste Carrier Systems



Ginger

Ginger supply remains tight despite increased cultivation in India. Farmers are focusing on selling fresh roots due to attractive prices, limiting the amount available for dehydration. This has led to firm prices for dried ginger.

In Nigeria, the crop has been completed but with poor quality and low availability. Most of the harvest is being used as seed material for future planting. There is no significant carryover, and export markets remain largely dry. Global availability of IPM-grade dried ginger is especially limited. Prices are expected to remain high with upward pressure in the coming months.



Bay Leaves

The market for bay leaves is split between FAQ and Hand Selected (HS) grades. Demand for HS grades remains high, but availability is limited due to fire damage in past seasons and reduced supply zones. Prices for HS material have increased notably.

FAQ quality is under pressure from weak demand and abundant Chinese supply. Stocks of Chinese material are ample, and prices are softening. The next harvest will start in September. Early contracts for HS grades are recommended given continued tight supply.



Questions about the market?

We are happy to help!

Ambachtstraat 46, 5804 CD Venray
The Netherlands, www.ctcs.de