



Onion

India has seen abundant white onion arrivals this year, with total availability higher than in recent seasons. Quality has been mixed, and dehydrators remain selective, with premium material more difficult to secure.

China expanded onion planting in Gansu province, and harvesting has begun with good prospects. Egypt has also enlarged acreage and expects a healthy output, while the USA maintains steady yields. With increased supply from multiple origins, the global onion market is well covered, though differences in quality may keep higher grades supported.



Paprika / Capsicum

Indian capsicum and paprika markets are influenced by high stock levels in cold storage. Farmers are slow to release material, anticipating firmer prices later in the season.

In Karnataka, paprika cultivation dropped compared to last year, creating expectations of tighter supply. Meanwhile, rising costs for land and labor are pushing some farmers to shift away from chilli crops. The market sentiment is gradually firming, and a cautious upward trend is likely in the coming months.



CTCS

Market report August 2025



Oregano

Turkey's oregano crop is below expectations, with limited output from key regions such as Denizli. Farmers are reluctant to sell quickly, holding stocks in anticipation of firmer returns.

Other origins such as Greece, Albania, Egypt, and South America cannot close the gap, leaving global supply short of demand. The market is therefore expected to remain bullish throughout the season, especially for certified material.



White Pepper

Vietnamese white pepper is in short supply, with much of the crop already committed. Farmers prefer to hold their remaining material, expecting stronger levels later in the season. This behavior has limited availability, keeping the market firm.

Indonesia's Muntok white pepper crop has been smaller and quality is inconsistent compared to last year. With both key origins offering reduced volumes, the overall market outlook is tight. Demand remains steady, and without new arrivals, firmness is expected to persist well into the next season.

Questions about the market?

We are happy to help!

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



Turmeric

India increased turmeric acreage again this year, supported by strong grower interest. Farmers continue to hold stock, and demand remains steady across segments. The outlook is stable but under upward pressure in the medium term.

Indonesia reports a slightly larger crop than last year, with favorable drying conditions. Global demand has picked up after tariff adjustments in major markets, supporting a firm tone.



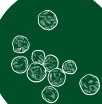
Cumin

India remains well supplied with cumin thanks to carryover stocks, even though the new crop was smaller. Prices have reached stable levels, and demand continues steadily in both export and domestic channels.

In Turkey and Syria, drought has reduced yields, while China expects better results. Overall, global availability appears balanced, with limited movement expected in the near term.



CTCS



Black Pepper

Vietnam has already exported a large share of its crop, leaving limited volumes available for the remainder of the year. Farmers are holding on to stocks, waiting for firmer levels later in the season. This cautious selling has reduced spot availability and supports a steady to upward trend.

Indonesia is facing weaker yields due to irregular rainfall, while Sri Lanka remains the highest cost origin with only modest volumes. Brazil reports a much larger harvest than last year, but farmer stockholding and trade complications limit the flow to export markets. Despite sufficient production on paper, the market feels tight, and firm sentiment is expected to continue.



Garlic

China remains the key garlic supplier worldwide, with this year's crop showing solid growth. Initial concerns from cold weather in spring eased once new supply reached the market. Farmers hold good stocks, and processors continue to run with lower input costs.

India also expanded planting in several states, lifting overall production. Some regions reported pest damage, but volumes remain ample. The combination of high availability and weaker fresh market demand points to stable conditions. Buyers expect little change in the short term, though quality differences may create some spread.

Questions about the market?

We are happy to help!

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