



CTCS

Market report
February 2026



ISC & VPSA

Last week CTCS attended the International Spice Conference in India, where global stakeholders discussed current crop developments, demand trends and regulatory changes across major producing origins. The overall sentiment reflected continued focus on supply stability, sustainability requirements and shifting export dynamics.

In the coming week, CTCS will be present at the annual conference of the Vietnam Pepper and Spice Association in Da Nang. This event brings together key players from the global pepper and spice sector to exchange insights on market outlooks, compliance developments and trade flows. By attending both events, CTCS continues to gather first hand market intelligence and strengthen relationships across key origins.



Onion

Indicates that white onion dehydration in Gansu, China has been completed. Prices are declining due to large inventories. In India, white onion flake prices remained stable after a previous increase, although premium quality before monsoon is limited.

Overall supply for standard grades is comfortable, particularly from China. However, higher grade material remains tighter in India. Buyers can remain relatively relaxed for standard specifications, while timely coverage is advised for premium quality flakes.



IFS Certification

CTCS has successfully renewed its IFS Broker and IFS Logistics certifications following an unannounced audit. This outcome confirms that our processes consistently meet internationally recognized standards for quality, safety and traceability within the food supply chain, without prior preparation. The positive audit result underlines our ongoing commitment to reliability, transparency and strict quality control across sourcing, storage and distribution. By maintaining these certifications under unannounced conditions, CTCS demonstrates that compliance and operational discipline are embedded in our daily activities.



Turmeric

Turmeric production in India shows mixed conditions. While acreage increased in central regions, heavy rains in parts of Maharashtra caused localized damage. Overall output is expected to remain close to last season, although carry forward stocks entered the season at relatively low levels. Harvesting is expected to peak later than usual in some southern regions due to delayed sowing.

Prices remained stable to firm in recent months, supported by steady domestic and export demand. Market sentiment remains cautious, with buyers focusing on short term needs. Given weather uncertainties and limited premium quality availability, moderate coverage for short to medium term requirements is advised, especially for higher grades and compliant material.



Ginger

Persistent rainfall in India during late 2025 disrupted harvesting and drying activities. Farmers increasingly prioritized fresh sales, resulting in reduced availability of dry ginger. Carry forward stocks remained limited, further tightening supply. In Nigeria, harvesting started with improved crop performance, although logistical constraints and quality variability continued to restrict export volumes. China and Vietnam reported firm market conditions supported by steady demand and constrained supply.

Fresh ginger prices strengthened steadily, while dry ginger prices increased more sharply due to limited material, especially extraction grade. Overall price levels remain significantly above last year. With tight supply and firm global demand, near to medium term coverage is recommended, particularly for dry ginger of reliable quality origins.



Cumin

Cumin acreage in India is projected below last season, particularly in Gujarat. Weather conditions were generally favorable during sowing, although localized cold waves in Rajasthan created some crop stress. The coming weeks remain crucial for yield development.

Carryover stocks are considered sufficient overall, but EU and Japan compliant qualities remain tight. The market is currently influenced by large stockists positioning prices at elevated levels. Price direction will largely depend on weather performance in the remaining growing period. Buyers are advised to monitor developments closely and secure compliant qualities in time.



Garlic

Cold weather conditions in mid January in China had only limited impact on garlic seedlings, and weather patterns have since normalized across the main growing regions. Crop development remains stable at this stage, with no major production concerns reported. In the dehydrated segment, garlic flake prices in China show relative stability compared to previous volatility seen in earlier seasons. Supply remains available, although producers are monitoring planting conditions and export demand closely.

In India, the situation differs. Traditional garlic clove prices have increased, as the new crop is not expected to reach the market until April. This gap between old crop availability and new crop arrivals is supporting firm pricing levels. Market participants report cautious selling behavior, with stockholders monitoring price direction before releasing larger volumes. Export demand remains steady, particularly for consistent quality and well processed material.



Overall market sentiment is firm but not overheated. While no acute shortages are visible, the combination of seasonal tightness in India and stable but closely watched supply in China is keeping prices supported. Buyers are advised to secure short term coverage, especially for specific grades or origins, while monitoring new crop developments in the coming months.

**Questions about the market?
We are happy to help!**

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