CTCS Market Report July2026

Black Pepper

The global black pepper market remains firm following the completion of the Vietnamese harvest. Farmer selling has slowed considerably as many growers continue to hold stocks in anticipation of higher prices later in the year, while exports remain supported by steady demand from key markets. Harvesting in Brazil is now underway, with production expected to increase compared to last season, although selling pressure has so far remained limited. Indonesian arrivals are gradually increasing, but white pepper availability remains relatively tight due to a smaller crop.

Market sentiment remains positive as global inventories continue to tighten and demand for EU compliant material stays strong. Freight costs have increased in recent weeks, adding further uncertainty to the market, while buyers continue to secure longer term coverage where possible. Weather developments across producing regions, together with export demand from major consuming markets, will remain the key drivers of market direction during the coming months.

Turmeric

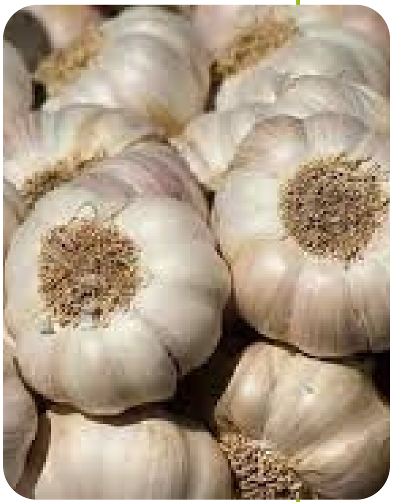
The turmeric market remains stable as fresh crop availability in India supports supply. Domestic and export demand remains steady, while prices have shown limited movement. Buyers continue monitoring weather conditions and crop development ahead of the next growing season.

Chili

The chili market remains relatively firm as supplies from the new Chinese crop continue to improve, while availability from India and other major origins remains stable. Demand from both domestic and export markets has remained steady, although buyers continue purchasing cautiously amid comfortable inventories and ongoing freight uncertainties. Export quality material remains readily available, supporting stable shipment volumes.

Market sentiment remains balanced as sufficient supply offsets steady demand across most destinations. Prices have shown only limited movement in recent weeks, while weather conditions in the main producing regions, freight developments, and export demand are expected to remain the key drivers of market direction during the coming months.

Garlic



The garlic market remains well supplied following the completion of the new Chinese harvest. Higher production and comfortable carry over stocks continue to support availability, while export demand remains steady. Prices remain relatively stable as ample supply offsets the recent increase in buying interest.

White Onion

The onion market remains well supplied, supported by comfortable inventories and stable production across the major origins. Harvesting is progressing well in the United States, while Egypt expects a larger crop than last year. Prices remain broadly stable despite sufficient global availability.

Questions about the market?
We are happy to help!

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