CTCS

Market Report
June 2026

Black Pepper

The global black pepper market remains relatively firm following the completion of the Vietnamese harvest. Production in Vietnam is estimated at around 155 KMT, while exports during the first four months of the year increased strongly, supported by higher demand from China and continued buying from the United States. Brazil is expected to deliver another solid crop during the second half of the year, while Indonesian production is forecast to decline due to excessive rainfall, limiting overall global supply growth.

Market sentiment remains cautiously positive as carry over stocks continue to tighten and production costs remain elevated across several origins. Although short term availability is sufficient, buyers are gradually securing longer term coverage amid expectations of firmer market conditions later this year. Weather developments in Indonesia and export demand from major consuming regions will remain the key drivers for price direction during the coming months.

Rosemary

The rosemary market is improving as the 2026 harvest gets underway in Morocco following several years of reduced production. Improved rainfall has supported better crop conditions and higher expected volumes, although carry over stocks remain limited. Buyers continue monitoring new season availability while demand remains steady.

Oregano

Oregano availability is gradually improving as the 2026 harvest in Turkey approaches, supported by favourable growing conditions and increased planted acreage following last year's record prices. Greek oregano remains limited, with carry over stocks largely exhausted and new crop availability still several weeks away, keeping immediate supply relatively tight across the European market.

Market prices have remained relatively firm despite improving production prospects, as demand continues to outpace immediately available export quality material. Buyers continue to monitor the new Turkish harvest closely, while increased availability from the new crop is expected to create a more balanced market during the second half of the year, provided weather conditions remain favourable.

Garlic

The garlic market is showing stable supply conditions as the new crop harvest progresses across the main producing regions in China. Higher production estimates and comfortable carry over stocks continue to support availability, while export demand remains steady. Prices continue to show a softer trend as improving supply expectations outweigh demand.

White Onion

The onion market remains well supplied, supported by comfortable carry over stocks and stable production levels in China. Market attention is gradually shifting towards the end of the Indian dehydration season, with steady demand continuing to support prices despite ample global availability.

Questions about the market?
We are happy to help!

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