CTCS

Market Report
Oktober 2026

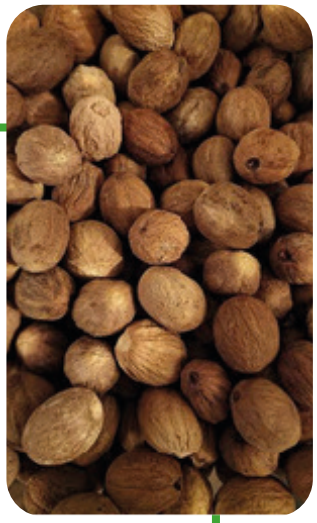
Turmeric

The turmeric market remains firm as significantly higher acreage is offset by concerns over lower yields and extremely low carry-forward stocks. The market has strengthened considerably in recent months, while new crop arrivals are expected to remain limited during January and February. Uncertainty regarding final yields and overall production continues to support firm market conditions.

Chili

The chilli market remains firm, supported by delayed sowing in southern India and lower carry-forward stocks. Export prices have remained relatively stable, while increased acreage could improve availability later in the season. Market direction will largely depend on crop development, actual yields and export demand during the coming months.





Nutmeg

The global nutmeg market remains firm as available stocks remain relatively limited while demand from the food industry continues at steady levels. Buyers continue to monitor availability from Indonesia and other key origins, as supply developments are expected to remain an important factor influencing price direction in the coming months.

Garlic

The garlic market remains under pressure as high inventory levels in China continue to weigh on prices. Additional volumes from late-season garlic and seed screening are entering dehydration, while weaker domestic demand is adding further pressure. New crop planting has started, with acreage expected to be 5–10% lower than the previous season.

Market conditions differ significantly by quality. Lower-quality flakes remain widely available, while supplies of high-quality ULB and ELB garlic flakes are limited and RTE availability is extremely tight. This growing difference in availability between standard and premium grades is expected to remain an important market factor in the coming months.

Cumin



The cumin market remains well supplied following satisfactory production despite lower acreage. Improved yields and strong market arrivals continue to support availability, although premiums for EUcompliant grades remain elevated. New crop sowing has started, with dry weather and competition for acreage expected to remain key factors influencing the market.

Onion

The Egyptian onion crop outlook is positive, with production expected to increase by around 5.7%. European demand remains strong, putting upward pressure on prices. No major shortages are currently expected, and the new crop will become available from January onwards.



Questions about the market?
We are happy to help!

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