



SENSIENT
NATURAL INGREDIENTS
cropupdate

CALIFORNIA ONION, GARLIC & PARSLEY / Q1 2025

sni.sales@sensient.com | sensientnaturalingredients.com | +1.209.667.2777

onion
US/California-Grown

SNI's 2024 onion crop, came in slightly below its aggressive CY2024 plan due to adverse weather conditions that prompted a localized outbreak of downey mildew in the Imperial Valley. Field Representatives, in anticipation of the potential spread from other crops to onion, acted swiftly to impede extensive proliferation, mitigating significant destruction of the sizable growing area.

SNI continues to expand its growing acreage in and around California 1) in response to the growing demand for US-grown onion, 2) to mitigate risk of loss due to a potential localized disease or severe weather event, and 3) to ensure fulfillment of contracted volume without disruption even in the event of a partial crop loss.



Onion harvest in California's Central Valley

The impact of impending tariffs on landed cost, fuel, labor, supply disruption and demand for domestic product is uncertain. Customers are advised to secure forward contracts to ensure supply and price stability.

Notable Info

- All piece sizes of US-grown onion - large chopped to powder - are available now.
- Strong demand for XLB, LB, Optical Index & Bulk Index controlled, chopped and granulated.
- Toasted onion is in stock; ready to ship.
- Organic onion is in high demand.
- Irradiation costs are rising, further impacting pricing.
- Potential tariff increases on imported onions could further drive up demand for US-Grown onion.

Planting for SNI's CY2025 onion crop is in progress with almost 80% of growing areas completed. The substantial acreage in Southern California was completed prior to the outbreak of the LA wildfires. The growing areas are well-outside of Los Angeles County and were never threatened by the disaster.

SNI's Planting is also complete in Central California (San Joaquin Valley) and is on target to migrate north to Northern California, Oregon and Washington. Planting will continue through April-May.

garlic

US/California-Grown

SNI's California-grown garlic crop is in the ground (planting completed in November 2024) and progressing according to plan. Weather conditions have been favorable thus far. Planting acreage is on par with prior year.

SNI Field Representatives are keeping close watch on garlic plantings to ensure best grower practices are implemented, irrigation levels are optimum and any incidence of disease is swiftly eradicated. Diverse crop rotation to foster resilient farm ecosystems is part of SNI's regenerative agriculture practices. In addition, SNI's garlic is on drip irrigation to reduce overall water consumption.



Garlic plantings in California's Central Valley

Demand for domestic, sustainably-grown garlic and onion continues to increase. Impending tariff increases on Chinese and other imports may prompt constraints for foreign supply chains and further impact demand and pricing for US-grown garlic and onion.

Garlic costs, both domestic and imported, have climbed in recent months. Grower costs and operating expenses have risen dramatically, coupled with a below-average global supply available to satisfy escalating demand for certain piece sizes. Garlic prices will reflect these significantly higher input costs, especially for high-demand pieces, larger fractions and stringent OI (*optical index*) and BI (*bulk index*) specifications.

**California
ROASTED
garlic is
available
now.**



Sensient's Garlic Powder, Granules & Minced

parsley

US/California-Grown

SNI's CY2025 parsley crop has benefitted from early rains and temperate weather this season, prompting harvest operations to kick off in early February. Crops size is on par with prior year. With imports on the decline, domestic demand for California-grown parsley has increased. Harvest is expected to continue through April.



California parsley crop

California's snow pack stands at 91% of average, and the state's largest reservoirs are in excess of 100% of the historical average. It is, however, too early to eliminate chances of extreme shifts between wet and dry conditions.



Nighttime harvest of California curly-leaf parsley

outlook

- All piece sizes of US-grown onion (large chopped to powder), are available now.
- Strong demand for XLB, LB, O/I and B/I controlled, chopped and granulated onion.
- California toasted onion is in stock, ready to ship.
- Organic onion is in high demand.
- Irradiation costs are rising, further impacting pricing.
- California drought conditions range from Extreme and Severe in the SoCal desert to Moderate and Abnormally Dry in the Central Valley. Snow pack and reservoir levels are favorable
- Parsley harvest starts first week of February. Crop size on par with PY.
- Onion planting continues through May; harvest kick off in mid-April, until then, all sizes are in supply.
- Overall impact of impending tariffs on fuel, labor, supply disruption and demand for domestic product is uncertain.

