

The European market potential for dried mushrooms

In the long term, the European market for dried mushrooms is expected to show stable growth. This growth is likely to be driven by changes in the consumption patterns of European consumers. This includes the rising interest for vegan food and animal protein replacement. Another driving force would be increased interest in medical mushrooms as they are rich in micronutrients and support immune system. Germany, Italy, France, the United Kingdom, the Netherlands and Poland offer most opportunities for developing country suppliers.

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1. Product description

Dried mushroom is the product obtained from fresh, edible, and cleaned mushroom. They are then dried whole, or they are trimmed to the desired style and then dried. Dried mushrooms can also be produced from frozen mushrooms through [lyophilisation](#), they are then called freeze-dried.

Fresh mushrooms used for drying found on the European market can be cultivated, but a large share of the market consist of wild dried mushrooms which are collected from their natural environment before drying. On average you need around 10kg fresh mushrooms to produce 1kg of dried mushrooms, but this ratio varies depending on the mushroom type and external factors.

Dried mushrooms are not intended for immediate consumption, but as an ingredient after rehydration. They are mainly used in home cooking (for example for soups and risottos), as ingredient in dehydrated meals and spices, and as ingredient in healthy food and pharmacy products. After rehydration (soaking in water for 30-60 minutes), they can be prepared in a similar way to fresh mushrooms. The peculiarity of dried mushrooms is that the intensity of the taste and flavour increases after drying.

There is no official trade classification for dried mushrooms, as trade consists of many species of mushrooms.. However, they can be classified into three groups, divided by the main European market segments:

- Gourmet dried mushrooms – mostly including types which are used in the European cuisine. Typical examples are porcini (*Boletus*), chanterelle (*Cantharellus*), morels (*Morchella*), trumpets (*Craterellus*), oyster mushrooms (*Pleurotus*) and truffles (many species).
- Asian dried mushrooms – types which are used in Asian cuisine. Typical examples are Shiitake (*Lentinula*), eringi (*Pleurotus eryngii*), mu-err, also known as black fungus or wood ear (*Auricularia*), maitake (*Grifola*), white fungus, also known as jelly fungus (*Tremella*) and straw mushroom (*Volvariella*). Shiitake and maitake are also used as medical mushrooms.
- Medical mushrooms – types of mushrooms mostly used as dietary supplements. Examples include chaga (*Inonotus obliquus*), reishi (*Ganoderma lingzhi*), cordyceps (*Cordyceps militaris*), lion's mane (*Hericium erinaceus*) and himematsutake (*Agaricus blazei*).

This study covers general information regarding the market for dried mushrooms in Europe that are of interest to producers in Developing Countries. Please refer to table 1 to find the products and their product codes. Some of the medical mushrooms may be sold in a powdered form under different statistical codes, but sold quantities are too small to influence the accuracy of the analysed trade statistics.

Table 1: Products in the product group of dried mushrooms

Combined Nomenclature Number	Product
071231	Dried mushrooms of the genus "Agaricus", whole, cut, sliced, broken or in powder, but not further prepared (known also as dried button mushrooms, champignon mushroom or chestnut mushrooms)
071232	Dried wood ears "Auricularia spp.", whole, cut, sliced, broken or in powder, but not further prepared
071233	Dried jelly fungi "Tremella spp.", whole, cut, sliced, broken or in powder, but not further prepared
071239	Other dried mushrooms and truffles, whole, cut, sliced, broken or in powder, but not further prepared

Picture 1: Dried wood ear



Source: Flickr

Picture 2: Dried chanterelles



Source: Wikipedia

Picture 3: Dried porcini



Source: Wikimedia

Picture 4: Dried morechella mushrooms



Source: Wikipedia

2. What makes Europe an interesting market for dried mushrooms?

Although Europe is not the largest importer of dried mushrooms, Europe is an attractive market because of the variety of the different market segments. Import prices for dried mushrooms are generally higher in Europe than in the rest of the world. This provides opportunities for suppliers of quality gourmet mushrooms. Opportunities can be also found among health-conscious consumers that looking for functional food including specific dried mushrooms favoured by their health benefits. Finally, dried mushrooms are frequently used as an ingredient in the food processing industry.

Europe accounts for around 10% of the world's dried mushroom market. European dried mushroom imports have reached 11 thousand tonnes in 2019, worth €150 million. Around 45% of European dried mushrooms trade consists of import from developing countries. A large share of internal European trade consists of re-exporting of imported dried mushrooms.

In 2019, 30% of the European imports consisted of the genus *Agaricus* mushroom type, 62% of other dried mushrooms and 8% of dried wood ears of Asian origin. According to the official statistics, the "other mushrooms" category is not further defined. However, it can be roughly estimated that import of the "other mushrooms" category is represented by around 50-60% of dried porcini mushrooms, 20-30% of dried shiitake mushrooms and the remaining 10-30% are represented by many other types.

In the next five years, the European market for dried mushrooms is likely to increase with an annual growth rate of 1-3%. Import growth of dried medical mushrooms (in the food supplements category) will be even higher, driven by the increasing demand for [functional food](#). Regular fluctuations in imports will continue to be influenced by the harvested crops, rather than changes in demand, especially for wild mushrooms. Quantities of wild collected mushrooms depend on weather conditions during the harvesting season. Due to climate change it can be expected that fluctuations of wild harvest will be more intensive.

European market for dried mushrooms is diversified as none of the countries have a dominance in imports. The three biggest importers (the Netherlands, Germany and France), import a relatively similar quantity of dried mushrooms (see figure 2).

3. Which European countries offer most opportunities for dried mushrooms?

The six countries with most opportunities for dried mushrooms are Germany, the Netherlands, France, United Kingdom Italy and Poland.

In terms of imported quantities, the Netherlands was the leading European importer of dried mushrooms in 2019. They imported 19% of all mushrooms, closely followed by Germany (18%), France (15%), Italy (12%) and the United Kingdom (11%). However, in terms of value, the ranking of the leading importers is different as shown in Figure 3. The Netherlands, which is the highest importer in quantity terms, is ranked 4th in value terms. This is because the Netherlands imports high quantities of dried cultivated mushrooms from Poland, which have a relatively low price.

France and Italy offer opportunities for suppliers of wild collected gourmet mushrooms, as both countries use dried mushrooms in traditional home cooking. The Netherlands is the leading European import market for Asian types of mushrooms. Germany offers opportunities in several market segments, including spices and dehydrated soups. The United Kingdom is an important market for medical mushrooms and food supplements. Together with Poland, those 6 countries offer the most opportunities for dried mushrooms in Europe.

Germany: the European importer with a large organic market

German import of dried mushrooms fluctuated over the last 5 years and reached 2 thousand tonnes in 2019, worth €28 million. In 2019, Germany imported 50% of its dried mushrooms from China, followed by the Netherlands (12%), Chile (10%), Peru (9%) and Poland (6%). Peru is gaining market share at the fastest rate. Germany increased imports of dried mushroom from Peru 6 thousand tonnes in 2015, to 175 tonnes in 2020.

Most quantities of dried mushrooms in German mainstream supermarkets, are supplied by companies selling fresh mushrooms such as [Pilze Wohlrab](#), [Niklas](#) and [RPZ](#). In addition to specialised mushroom traders, dried mushrooms are also sold by spice companies such as [Fuchs](#) or [Wagner Gewürze](#). Germany is also home to important suppliers of Asian dried mushrooms. Some German companies developed their own brands within the Asian food segment, including dried mushrooms, such as [Bamboo Garden](#) (by company Theodor Kattus) or [Diamond](#) (by the company Kreyenhop & Kluge).

Germany is a particularly attractive market for organic dried mushrooms, as the country is the [largest European market for organic food](#). A large share of organic dried mushrooms are sold through specialised organic and health food retailers, such as [Denn's](#), [DM](#) or [Alnatura](#). Those specialised retailers also sell medicinal mushrooms as food supplements or in powdered form. Some examples include [Raab Vitalfood](#), [Vita World](#) or [Mycovital](#).

Picture 5: Example of a dried mushrooms brand in Germany (Green Forest)



Source: Amazon

Picture 6: Example of Asian dried mushrooms brand in Germany (Bamboo Garden)



Source: REWE

The Netherlands: importer and producer of dried button mushrooms

In Europe, the Netherlands imports the largest quantities of dried mushrooms, but it is ranked fourth in terms of value. Over the last 5 years import fluctuated, reaching a peak of 3.7 thousand tonnes in 2017. In 2019, the Netherlands imported 2.1 thousand tonnes of dried mushrooms, worth €12 million. The Netherlands is the largest European importer of dried mushrooms of the genus *Agaricus* (button mushrooms). Dried button mushrooms account for 84% of all imported dried mushrooms in the Netherlands.

The Dutch market of dried mushrooms is very concentrated. Only few countries are present on the market. In 2019, the Netherlands imported 80% of its dried mushrooms from Poland, followed by China (11%), Germany (3%) and France (2%). The only developing country supplier of dried mushrooms to the Netherlands is Vietnam. However, they still delivered the modest quantity of 19 tonnes in 2019.

Prices of dried cultivated mushrooms imported from Poland, are (on average) 3-4 times lower compared to prices of wild collected dried mushrooms. This explains why the Netherlands is ranked lower in terms of value. Imported quantities of dried mushrooms from Poland complement the offer from the domestic production. The Netherlands is the second largest European producer of fresh button mushrooms and some companies are also drying some of these mushrooms. For example, a Dutch company [Scelta Mushrooms](#) started a production of dried mushrooms in the Netherlands together with a German company [Worlée](#).

Dried mushrooms in the Netherlands are sold by different types of companies, including spice companies, dried ingredient packers and also as brands of retail chains. Significant quantities are sold as ingredients for dehydrated soups. Examples of private labels of Dutch retail chains include Asian dried mushrooms of [Aldi](#) (Asia Green Garden label) and porcini dried mushroom of [Jumbo](#) (Jumbo label). Dried mushroom in the Netherlands are also sold by spice companies (such as [Euroma](#)), by organic brands (such as [Smaakt](#)) and by several specialised traders of Asian food (such as [Oriental Merchant](#)).

Picture 7: Example of a dried mushrooms brand in the Netherlands (Euroma)



Source: Euroma

Picture 8: Example of Asian Dried mushrooms in the Netherlands (Thai Mas)



Source: Thai Mas

France: lover of luxury gourmet mushrooms

In terms of quantity, France is the third largest European market for dried mushrooms in Europe, but the first in terms of value. Over the last five years, import of dried mushrooms to France has increased by an annual growth rate of 2% and reached 1.6 thousand tonnes in 2019, worth €32 million. In 2019, France imported 57% of its dried mushrooms from China, followed by Peru (11%), Poland (4%), Romania (4%) and Lithuania (4%). The largest high import increase came from Peru, Poland, Romania and Lithuania.

French consumers purchase different types of dried mushrooms, but dried morels are specifically popular. Dried morels are much more expensive compared to other imported dried mushrooms this explains the much higher import value of France compared to other European countries. Although many dried morels are collected and produced in France, they are also imported from China. The culture of eating luxury gourmet mushrooms, such as morels or black truffles, is developed in France, providing opportunities for export. Several years ago, the French company [France Morilles](#) transferred technology of cultivated morel production from China to France.

Dried mushrooms are also sold as private labels (brands of the retail chains) such as [Carrefour](#) (Carrefour Selection and Carrefour bio labels), [Leclerc](#) (Notre Jardin label), Super U (U Saveurs label) or [Auchan](#) (Mmm! Label). Notable independent brands are [Borde](#) and [Sabarot](#). France also imports large quantities of Asian mushrooms which are sold mainly in ethnic shops and supermarkets. One of the largest sellers of Asian dried mushrooms is the leading Asian supermarket chain in France - [Tang Frères](#).

All supermarket brands (private labels) in France start to use [nutriscore](#) to label dried mushrooms. The nutritional value of dried mushrooms is mostly labelled with a “B” score (i.e. preferable for your health).

Picture 9: Example of a private label of dried mushroom in France (Carrefour Selection)



Source: Carrefour

Picture 10: Example of dried mushrooms brand in the United Kingdom (Bamboo Garden)



Source: Tesco

The United Kingdom: a variety of segments

In 2019, the United Kingdom imported 1.3 thousand tonnes of dried mushrooms, with a value of €11 million. Most imported dried mushrooms are consumed within the country. In 2019, the United Kingdom imported 52% of its dried mushrooms from the Netherlands, followed by China (19%), France (18%) and Italy (7%). Import from the Netherlands significantly increased, from only 41 tonnes in 2015 to 680 tonnes in 2019.

Two leading suppliers of dried mushrooms in the United Kingdom are [Leathams](#) (brands [Mechant Gourmet](#) and [Chefs Brigade](#)) and [RH Amar](#) (brand [Cooks&Co](#)). In the United Kingdom, many suppliers sell dried mushrooms through Asian and oriental types of shops. Notable examples of dried mushroom suppliers of the Asian supermarkets include [Day In Supermarket](#), [SeeWoo](#) and [Interlink Direkt](#). Asian dried mushrooms are not sold only to the Asian supermarkets, but also in the mainstream chains. For example, a company [Loving Foods](#) has developed its own Asian inspired brand [Kingfisher Oriental](#).

The United Kingdom is also an interesting market for food supplements produced from dried or powdered mushrooms. The leading food supplement seller in the United Kingdom is the specialised health food chain [Holland & Barrett](#) which is selling several types of mushroom based food supplements under its own private label. Independent mushroom supplement brands include [Pukka Herbs](#), [Indigo Herbs](#) and [Naturya](#). Examples of traders of dried mushrooms for food supplements production include [Balance Healthcare](#) and [Cambridge Commodities](#).

The market in the United Kingdom offers specific opportunities for suppliers of Fairtrade certified dried mushrooms, as the country is home to one of the largest Fairtrade products markets in Europe. Currently there are around 5,000 Fairtrade certified products for sale in the United Kingdom.

Italy: dried porcini specialist

In 2019, Italy imported 1.3 thousand tonnes of dried mushrooms for a value of €26.7 million. Italy also exports around 500 tonnes of dried mushrooms per year. In 2019, Italy imported 53% of its dried mushrooms from China, followed by Romania (11%), Bulgaria (9%), Slovenia (8%) and Poland (7%). China is gaining most of the market share on the Italian market. Import of dried mushrooms in Italy from China has increased from 385 tonnes in 2015 to 700 tonnes in 2019.

The most popular dried mushrooms in Italy are porcini which are frequently used as an ingredient in risotto and soups. Wild collected dried porcini mushrooms are mostly imported from Eastern Europe, to complement Italy's

own production. Dried mushrooms in Italy are sold mostly by private supermarket labels, such as Coop, Conad, Crai or Carrefour. Examples of independent brands include [Asiago](#), [Naturbosco](#), [Demetra](#), [Flotei](#) and [Lunelli](#). Italy is also home to one of the largest groups of truffle mushrooms consumers and traders in Europe.

Poland: increasing dried mushroom producer and trader

Over the last decade, Poland developed into the leading world exporter of fresh *Agaricus* (button mushrooms). Polish exporters recognised the need for dried mushrooms in the European market. Many fresh mushroom producers also invested in the production of dried mushrooms. In order to offer sufficient quantities of dried mushrooms, Polish companies also import significant quantities to complement domestic production.

In 2019, Poland imported 712 tonnes of dried mushrooms, with a value €9.7 million. Poland imported 41% of its dried mushrooms from China, followed by Chile (17%), the Netherlands (14%) and Peru (9%). Poland is also a producer and exporter of wild porcini mushroom. Examples of independent brands in Poland include [Nasza Chata](#), [Pol Grzyb](#), [Tagros](#), [Leśne Skarby](#) (Forests Treasures) and [Fungopol](#). Asian dried mushrooms in Poland are sold by specialised traders such as [Tan-Viet](#).

Tips:

Find German date traders on the websites of the specialised German Association - [Waren-Verein](#), and in the [German company directory](#) - Wer liefert was.

Learn more about the European cultivated mushroom industry from the national members of the [European Mushroom Growers Group](#).

4. Which trends offer opportunities on the European dried mushrooms market?

The increasing demand for meat-free meals, functional food and new flavours are the driving forces behind the growing consumer interest in dried mushrooms in Europe. Also, sustainable and ethical production is becoming an important aspect for European traders and consumers.

Veganism

Interest in veganism is surging in Europe. Many Europeans are adopting a (partly) vegan lifestyle. Vegans do not consume animal-based foods (like eggs and milk), they only consume plant-based foods like vegetables, pulses, mushrooms, seeds and grains. A vegan diet needs to be supplemented with food that has the same nutritional value as animal proteins have. Mushrooms are a good source for this. Also, mushrooms can provide a “meaty” flavour in number of dishes. Europeans choose to eat (partly) vegan for several reasons; ethical, ecological and health advantages.

The fast increasing growth of the vegan lifestyle can be illustrated by data from the United Kingdom, where a poll by the [Vegan Society](#) showed that the number of vegans in Britain has risen by more than 360% over the past decade, with over 500,000 people now adopting a vegan diet. Over the past two years, the number of Brits who have eaten meat-free foods has increased from 50% in 2017 to 65% in 2019.

The European Vegetarian Union (EVU) as the umbrella organisation of vegan and vegetarian associations and societies throughout Europe, is the background organisation for the [V-Label](#), a standardised voluntary European certification scheme with the aim of easy identification of vegetarian and vegan products and services.

Mushrooms as a superfood

Dried mushrooms have been used for medical purposes since ancient times but the interest in medicinal use of mushrooms in Europe has significantly increased again in the last several years. According to [Mintel research](#), consumer interest in ingredients with natural functionality, such as chaga mushroom, is high.

Dried mushrooms, or mushrooms in powdered form, are more used for the production of food supplements than fresh mushrooms. Also, there are scientific findings showing that sun dried mushrooms provide more nutrients compared to fresh ones. A [scientific study conducted on shiitake mushrooms](#) indicates that 100g of fresh mushrooms, after having been placed in the sun for 12 hours, contained an additional 1000µg of vitamin D2.

The most popular medicinal mushrooms consumed in Europe, in powdered form or in form of food supplements, include: shiitake (*Lentinula edodes*), Chaga (*Inonotus obliquus*), Reishi (*Ganoderma lucidum*), Cordyceps (*Cordyceps militaris* and *Cordyceps sinensis*), Turkey tail (*Trametes versicolor*), Lion's Mane (*Hericium erinaceus*), Hen-of-the woods or maitake (*Grifola frondosa*) and God's mushroom also known as himematsutake (*Agaricus blazei*).

Dried mushrooms as flavour enhancers

Innovative products increasingly use dried mushrooms as an ingredient. During [ANUGA 2019](#) in Cologne (leading food exhibition), several new products where mushrooms were used as the ingredient were presented. Examples are:

- Dried mushroom seasoning such as [truffle sea salt](#) or [porcini salt mill](#).
- Healthy dehydrated mushroom soups such as [Mush D soup](#) made of dried mushrooms containing one daily intake of vitamin D.
- Vegan mushroom crisps such as Other Foods [crunchy shiitake mushrooms](#).
- Mushroom spreads, such as Italian [Pate di Funghi e Tartufo](#), [Madia porcini pate](#) or [Selektia truffles and mushroom sauces](#).

Tips:

Promote dried mushrooms as healthy and nutritious on the European market. However, avoid health or nutritional claims which are not substantiated by scientific evidence. A good database to check current scientific evidence on nutrition and food supplements is [Examine](#).


Monitor industry trends and product innovations on leading European food trade fairs such as [Anuga](#), [SIAL](#) and [Food Ingredients Europe](#).


Read our study about [Trends on the European Processed Fruit and Vegetables Market](#) to find out more about general trends.


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