

Exporting coriander seeds to Europe

The European market offers interesting opportunities for coriander seeds as the popularity of Asian food continues to increase. The most important European buyer of coriander seeds is the United Kingdom, where demand continues to grow. Other European countries also rely greatly on the coriander seed supply from developing countries. This brings opportunities for you as a supplier.

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1. Product description

Coriander (*Coriandrum sativum*) is a plant native to regions ranging from southern Europe and North Africa to south-western Asia. The herb is cultivated in many countries all over the world. The leaves are commonly sold [fresh](#) or [dried](#), whereas coriander seeds are sold fresh, dried and ground, and are also used for [essential oil](#) production.

Coriander seeds have a warm and subtle flavour with a slight citrus hint. It has an aromatic scent that is soothingly warm, nutty, slightly fruity and complex.

The Harmonized System (HS) codes for coriander seeds are:

HS Code	Description
090920	Coriander seeds
090921	Whole coriander seeds
090922	Crushed or ground coriander seeds

This document focuses on both whole and crushed or ground coriander seeds.

2. What makes Europe an interesting market for coriander seeds?

The European demand for coriander seeds is steadily growing, mainly due to the increasing demand for exotic food in Western cuisine. Asian food is becoming [increasingly popular](#) in Europe. Examples are [Indian dishes](#) such as tikka masala curries and Indian chutneys, or [Thai food](#) like green curry pastes. Unlike many other spices, coriander is also produced in Europe itself, so exporters to the European Union face domestic competition. Nevertheless, India and other developing country exporters compete on this market successfully.

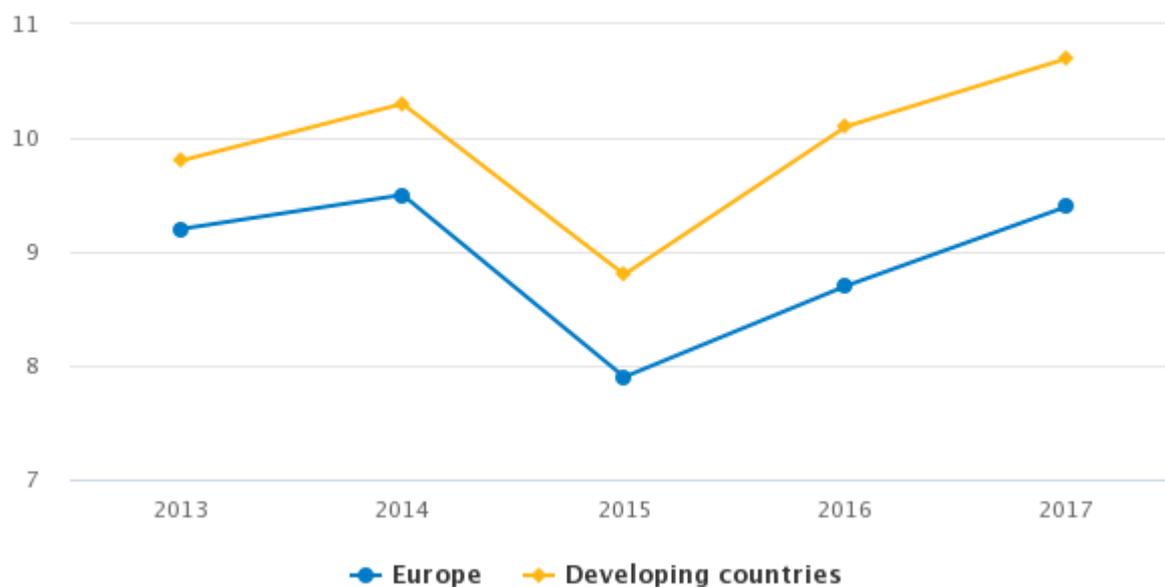
Slight increase of coriander seed imports

European imports of coriander seeds increased only slightly between 2013 and 2017 by 1% annually in volume and 3% in value. Developing countries are the main suppliers of coriander seeds. In 2017, 45% of the total European imports of coriander seeds originated in developing countries. European countries supplied 40% of total European imports in 2017. The remaining share (15%) originated in countries other than European or developing countries. Please note that Figure 1 below excludes the imports from countries other than European or developing countries.

The drop in coriander seed imports in 2015 was caused by a [decrease in production](#) because of bad weather conditions in India in 2014–2015, and the subsequent increase in import prices.

Figure 1: European imports of coriander seed, 2013–2017

in 1,000 tonnes



Source: Eurostat, 2018

As an exporter, you can benefit from the relatively stable imports. European buyers are constantly searching for reliable suppliers that can meet the necessary requirements, such as those regarding food safety.

Tips:

Contact European coriander seed traders and invest in establishing longterm trade relationships with them. Make sure you can deliver stable supplies that meet the requirements for food safety and product quality.

See our tips on [Finding buyers](#) and [Doing business](#) for more information about investing and maintaining relationships with traders.

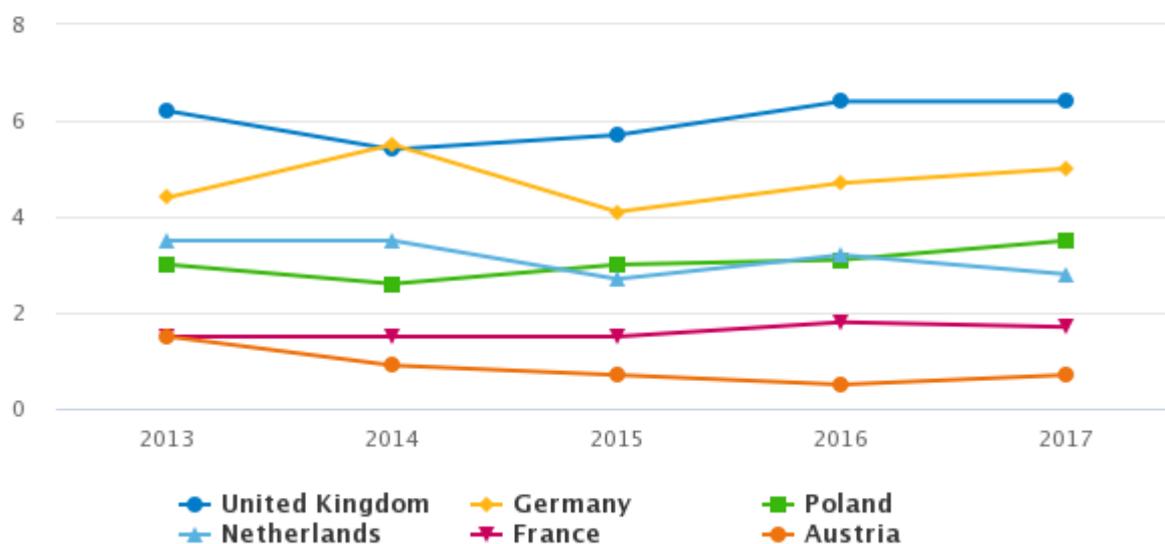
See our study of [Buyer requirements](#) for more information on the specific requirements in Europe.

The United Kingdom, Germany and Poland are the most interesting target countries

The main importer of coriander seeds in Europe is the United Kingdom, followed by Germany, Poland, the Netherlands, France and Austria. Together these countries accounted for 85% of total European imports in 2017.

**Figure 2: Leading European importers of coriander seeds
2013-2017**

in 1,000 tonnes



Source: Eurostat, 2018

Interesting markets for you as an exporter include the following:

- The United Kingdom is the main European importer of coriander seeds. The country is responsible for 27% of all European imports. Imports of coriander seeds in the United Kingdom increased slightly by an annual average of 1% in volume between 2013 and 2017. The United Kingdom is a major consumer of coriander seeds due to the popularity of Indian cuisine. Coriander seeds are often used in traditional Indian recipes. For its imports of coriander seeds, the country relies mainly on developing country suppliers. In 2017, 71% of the total coriander seed imports in the United Kingdom originated in developing countries.
- Germany also offers good opportunities as the secondlargest importer of coriander seeds in Europe. In 2017, 21% of total European imports of coriander seeds were imported to Germany. Although fluctuating during the period 2013 to 2017, on average German coriander seed imports increased by 3% in volume and 1% in value. In 2017, 30% of Germany's imports originated in developing countries. This share has decreased considerably over the past five years, although in terms of volume, Germany remains one of the leading importers from developing countries.
- Poland is the thirdlargest importer of coriander seeds. Between 2013 and 2017 imports increased by an annual average of 4% in volume. However, Poland sources almost all of its imports in neighbouring countries, Russia (49%) and Ukraine (47%). This makes it more difficult for developing countries (other than Ukraine) to enter this market.
- The Netherlands is a smaller yet still leading importer of coriander seeds. The country is responsible for 12% of total European imports of coriander seeds. In 2017, some 45% of Dutch total imports originated in developing countries. However, in the last few years Dutch imports decreased annually by 5% in volume between 2013 and 2017. In this same period, imports from developing countries decreased by 7% in volume.
- France is also an important importer of coriander seeds. Between 2013 and 2017, France's imports increased annually by 3% in volume and 2% in value.
- There are some relatively small importing countries whose imports are growing rapidly and are increasingly importing coriander seeds directly from developing countries. Examples include Switzerland (growing by 25% annually over the last five years), Belgium (+21%), Sweden (+17%), Romania (+16%) and Italy (+8%).

Tips:

Conduct additional market research to gain an insight into the differences between the various European markets mentioned above. For example, create a free account for statistical databases such

as [Eurostat](#) or [ITC Trade Map](#).

Visit or participate in trade fairs to test whether the market is open to your product, obtain market information and find potential buyers. The most relevant trade fairs in Europe are [Food Ingredients Europe](#), [Biofach](#) (for organic products), [SIAL](#) and [Anuga](#).

Strong role for European market players as suppliers of coriander seeds

European suppliers play a relatively strong role on the European market for coriander seeds. A large part of European imports of coriander seeds originated in Eastern Europe. However, imports from developing countries are increasing which makes their role more and more important.

The main European exporter of coriander seeds is Bulgaria. The country exported 17 thousand tonnes in 2017, representing a share of 41% in total European coriander seed exports.

Other important European exporters are Italy and Spain; these countries are responsible for a share of respectively 31% and 6% of total European exports in 2017. Other relatively small European exporters of coriander seeds are the Netherlands, Poland and Germany. European exporters or re-exporters add a lot of value to re-exported coriander seeds by further processing and packaging. Currently, European processors are mainly doing the processing and heat treatments of spices and herbs. However, companies in the countries of origin are now also taking over such activities. This trend offers opportunities for you, if you can comply with European buyer requirements, in particular regarding heat treatment, since this process is becoming an important buyer requirement.

European processors focus on improving activities:

- downstream, such as blending or developing new tastes, which means that they might be interested in new and exotic spices and herbs additional to coriander seeds;
- upstream, by strengthening the cooperation with exporters in developing countries, which entails transfer of knowledge and resources, or European companies integrating companies in developing countries.

Tips:

Search for European processors in the member lists of the national spice associations in Europe. Go to the member section of the [European Spice Association](#) (ESA) for an overview of associations.

See our study of [Value added spices](#) and herbs for more information on the requirements for value addition.

See our study of [Buyer requirements for spices and herbs](#) for more information.

Growing popularity of ethnic cuisine and spicy food

Ethnic flavours and foods [continue to appear in top food trends](#). In Europe, this is mainly due to the growing [multicultural population](#) as well as the fact that Europeans are more interested in exotic cuisines. Consumers learn more about other cuisines through travelling, but also due to globalisation (including migration and/or having migrants as neighbours) and the internet.

Coriander seeds are a widely used ingredient in Asian dishes: they are an integral part of the flavour base in Indian curries, masalas and mixes from throughout the Middle East. The seeds are becoming increasingly

popular in the European market, and are also used more often as an ingredient in non-Asian dishes as well.

Besides this original use of coriander seeds, the seeds are increasingly used in new applications, such as [smoothies](#).

Examples of ethnic recipes that are popular in Europe and contain coriander seeds are:

- [Authentic chicken tikka masala curry](#)
- [Coriander seeds Indian chutney](#)
- [Chicken Do Pyaaza](#)

An integral aspect of ethnic cuisine is the use of various spices, often mixed in one dish. In the last years, the demand for mixtures therefore increased. As a result, several brands have developed mixtures which include coriander seeds, such as the following.

- [Cajun mixture](#): a spice mix with coriander seeds, salt, pepper and other spices
- [Nasi spice mix](#): pepper, coriander, salt, garlic, etc.
- [Mixtures for pizza and pasta](#): coriander, sesame, vegetables and other spices

Tip:

See our study of [Trends for spices and herbs](#) for more information about trends on the European market for spices and herbs.

Sustainability is becoming an important requirement

Sustainable sourcing is an important trend in Europe, especially in the United Kingdom, the Netherlands and Germany. As a supplier, you will increasingly face sustainability requirements from your buyer. Many buyers see sustainable sourcing as a must.

Several of the major spice traders and processors are part of the [Sustainable Spices Initiative](#). This initiative aims at a sustainable spices and herbs sector by securing future sourcing and stimulating economic growth for producing countries. As part of the initiative, the companies have made a commitment to source their spices sustainably. Companies that import and process coriander seeds and that have joined the initiative are [Unilever](#), [McCormick](#), [Intertaste](#) and [Nedspice](#).

As a supplier or exporter, you can certify your coriander seeds to comply with sustainable sourcing requirements. While certification does give you a competitive edge, certification for coriander seeds is still very rare. In addition, most buyers on the mainstream market are unwilling to pay more for certified products. As a result, it is important to discuss the opportunities for certification with your buyers before you decide to invest in it.

Because of the growing importance of sustainability, this demand is expected to increase. In Europe, the most important certifications are [the Rainforest Alliance](#), [organic](#) and [Fairtrade Original](#)^[A1].

Tips:

Check the website of the [Sustainable Spice Initiative](#) to find European companies that are interested in sustainable sourcing.

Determine whether it is feasible for you to certify your coriander seeds. Can you find enough buyers for your product to offset your investments? You can look for buyers online; for example, on the

website of the [International Trade Centre](#), or by looking for exhibitors at the organic trade fair [BioFach](#).

See our study of [Exporting sustainable spices and herbs to Europe](#) for additional information. This document also includes longterm expectations of the market for certified sustainable products.

See our study of [Buyer requirements for spices and herbs](#) for additional information on requirements for sustainable sourcing and certification standards.

3. Which requirements should coriander seeds comply with to be allowed on the European market?

You can only export coriander seeds to Europe if you comply with the [buyer requirements for spices and herbs](#).

Legal requirements for all spices and herbs

If you do not comply with European legal requirements, your product can be refused at the border or withdrawn from the market. When exporting to Europe, you have to comply with the legally binding requirements for the following topics.

- Food safety: traceability, hygiene and control as specified in the [General Food Law](#).
- [Mycotoxins contamination](#): for coriander seeds, maximum levels of mycotoxins are set for aflatoxin (between 5 µg/kg for aflatoxin B1 and 10 µg/kg for the total aflatoxin content B1, B2, G1 and G2). For ochratoxin, the maximum level is 15 µg/kg.
- [Maximum residue levels of pesticides](#): if your coriander seeds contain more pesticides than allowed, it will be withdrawn from the European market.
- [Microbiological contamination](#): contamination can occur when the fruits, leaves or bark of plants are accessible to insects, reptiles and other animals while they are drying, or when plants are grown near polluted water or land.
- [Food additives and adulteration](#): spices and spice blends are rejected by custom authorities for containing undeclared, unauthorised or excessive levels of extraneous materials.
- [Maximum levels of polycyclic aromatic hydrocarbons](#): contamination with PAHs stems from bad drying practices.
- [Irradiation](#): this process is allowed but not commonly used as consumers do not always accept such treatments. Discuss this option with your buyer.

European buyers are increasingly requiring their suppliers to use steam sterilisation in order to combat the microbiological contamination of coriander seeds. You could earn a significant premium if you can supply coriander seeds that are sterilised at source. However, investments in the necessary equipment can be very costly, at up to €1 million.

Steam sterilisation could be damaging to the crop, as it can harm the taste of the coriander seeds. Research is being conducted into alternatives to this method. Currently, it is still the cheapest and safest method to combat microbiological contamination.

Tips:

Comply with the requirements listed above. Your buyer will transfer the costs for cleaning contaminated coriander seeds to you if you do not.

Check the [Rapid Alert System for Food and Feed \(RASFF\) database](#) for examples of coriander seeds withdrawn from the market and the reasons behind these withdrawals.

Compare your company with your potential buyer to find a strategic fit. Can you comply with

extralegal requirements for food safety and sustainability? What quantities of supplies can you deliver? Which type of product do you supply, mainstream or niche?

Always discuss with your potential buyers whether they want steam sterilisation. If you cannot sterilise your coriander seeds yourself, look for local sterilisation companies that can provide this service for you.

Comply with food safety requirements during drying, storage, processing (such as sieving, mixing, grinding or crushing), packaging and transport. If you do not comply, steam sterilisation will not work.

You also need to prevent contamination with mycotoxins and other contaminants, because steam sterilisation cannot take these substances out.

Keep up to date on the development of alternatives to steam sterilisation by checking online sources such as [GreenFoodDec](#).

Additional requirements

Consider complying with the following non-legal requirements to ease market access. By complying with these requirements, you can create a competitive advantage for your company or coriander seeds offering. European buyers can use these requirements as selection criteria for their new suppliers.

- Food safety certification: the most important food safety management systems in Europe are British Retail Consortium ([BRC](#)), International Featured Standards ([IFS Food](#)), Food Safety System Certification ([FSSC 22000](#)) and the Safe Quality Food programme ([SQF](#)). Each of these standards is part of the [Global Food Safety Initiative](#). Always verify your buyer's preference for a specific food safety management system, as some may prefer one system over the other. For example, BRC is developed by retailers in the United Kingdom and more commonly demanded on this market. If you want to target the United Kingdom, BRC may be more important.
- Corporate social responsibility (CSR) practices: companies have different requirements for CSR, such as signing their code of conduct or following common standards including the Supplier Ethical Data Exchange ([SEDEX](#)), Ethical Trading Initiative ([ETI](#)) or Business Social Compliance Initiative code of conduct ([BSCI](#)).

Requirements for niche markets

Complying with the following standards can be essential to access specific market segments and buyers in Europe.

- Sustainable product certification: the major certification systems are [organic](#), [Fairtrade\[A2\]](#) and [Rainforest Alliance](#).
- Selfverification: suppliers assess their own compliance with the sustainability code of buyers. Examples include Unilever's [Sustainable Agricultural Code](#) (SAC) or Olam's [AtSource](#).
- Glutenfree products and labelling: although coriander seeds do not naturally contain gluten, contamination can still happen. For example from seasonings that contain gluten. Check the requirements for [allergenfree labelling](#).

Quality requirements

Product quality is a key issue for buyers in Europe. You need to comply with the [Quality Minima Document](#) from the [European Spice Association](#) (ESA).

The Quality Minima Document specifies the chemical and physical parameters that coriander seeds needs to comply with when sold in Europe before crushing and grinding.

- Ash: maximum 10%

- Acidinsoluble ash: maximum 1.6%
- Moisture: maximum 11%

The ESA has not developed cleanliness specifications. As a result, European buyers often use the specifications for cleanliness stated by the [American Spice Trade Association \(ASTA\)](#).

Tips:

Use detection and prevention methods to ensure that your coriander seeds are not contaminated with metal, stones or animal droppings.

You can also use more sophisticated cleaning methods in order to add value to your product, such as steam sterilisation.

Check [ISO standard 2255:1996](#) for general guidelines on the grading, handling and packing of coriander seeds.

Follow ESA's [Quality Minima Document](#) on the chemical and physical parameters that your unprocessed coriander seeds need to comply with when they are sold in Europe.

Labelling requirements

Pay extra attention to the labelling of your product, as this aspect is important for European buyers.

For coriander seeds, your product label must include:

- the name of the product;
- details of the manufacturer (name and address);
- batch number;
- date of manufacture;
- expiry date;
- weight of contents;
- other information that the exporting and importing countries require, such as the bar, producer and/or packer code, as well as all extra information that can be used in order to trace the product back to its origin.

Tips:

See our study of [Valueadded spices and herbs](#) for requirements for consumer packaging and labelling.

See the website of the European Commission for additional information on [food labelling legislation](#). This requirement only applies to final products that are sold directly to consumers.

Packaging requirements

Coriander seeds are commonly packaged in jute or polypropylene bags. Polythene cannot be used, as the flavour components diffuse through it. The packaging must not be a source of contamination and must protect the product quality during transport and storage.

Tips:

Always ask your buyer for their specific packaging requirements.

Store your packaged coriander seeds in a dry, cool place to prevent quality deterioration.

If you offer organiccertified coriander seeds, physically separate them from seeds that are not certified.

4. What competition do you face on the European market for coriander seeds?

India, Ukraine and Russia are your main competitors

India is the largest supplier of coriander seeds to Europe. In 2017, the country supplied 3.9 thousand tonnes to Europe with a value of €5 million. India had a share of 36% of the total imports in volume from developing countries in 2017. The country is not only the current main supplier of coriander seeds to Europe, its supply is also growing. Between 2013 and 2017, imports in volume increased by 7% annually, while the value of imports increased in the same period by 10%.

Ukraine and Russia are also important producers of coriander seeds and suppliers to Europe. Between 2013 and 2017, import volumes for Ukraine grew annually by 2%, for Russia this was 4%. However, the value decreased in this same period: for Ukraine value of imports of coriander seeds decreased by 1% and for Russia by 6%.

Smaller developing country suppliers are:

- Morocco (market share of 9% of imports from developing countries in 2017)
- Turkey (4%)
- Argentina (3%)
- Egypt (2%).

Tips:

Use [FAOSTAT](#) to learn more about the production statistics of coriander seeds.

Opportunities for local value addition

Ground coriander seeds can offer opportunities for value addition in the country of origin. The first opportunity is in improving the quality and food safety of the spice, for example by focusing on purity, proven absence of allergens and heat sterilisation. Other opportunities are in grinding the spice and in preparing mixes. Here, besides having the capacity and knowledge to produce, the challenge is to gain the trust of your customers about your honesty in making these products. [Ground spices and mixes are easily tampered](#) with and buyers are wary of that.

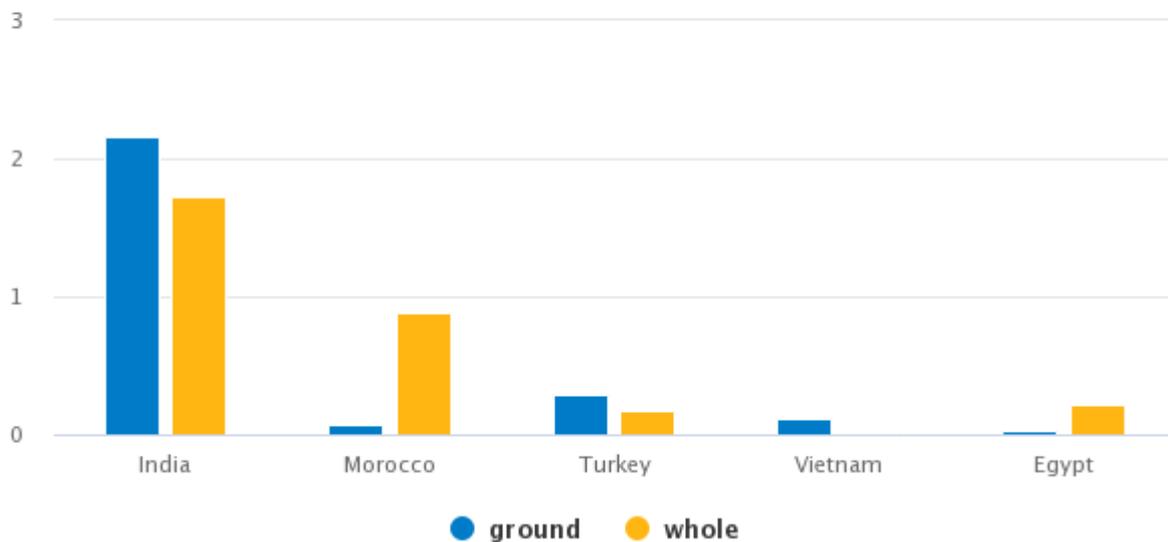
Over the last five years, imports of ground coriander seeds from developing countries grew by 1% in volume and 5% in value. At the same time, imports of whole coriander seeds from developing countries grew by 3% in both volume and value.

In 2017, suppliers from developing countries exported 10.7 thousand tonnes of coriander seeds to Europe with a value of €11 million. Of this amount, 73% consisted of whole coriander seeds, while 27% were ground.

Figure 3 below gives an overview of the main suppliers to Europe in terms of whole and ground coriander seeds.

Figure 3: Developing country coriander seed suppliers to Europe by processing level 2017

in 1,000 tonnes



Source: Eurostat, 2018

India is the main supplier of ground coriander seeds, with a 75% share of all imports from developing countries. India exports more ground coriander seeds than whole seeds to Europe, which offers opportunities for local value addition. In this respect, India could serve as a benchmark for other developing country exporters of coriander seeds. Other important suppliers are Turkey and Morocco, with shares of respectively 10% and 2%. While supplies of ground coriander seeds from India and Turkey increased 6% and 5% annually over the past five years, Morocco's supplies increased by 30%.

Tips:

Stay up to date on worldwide harvests and stock levels. Look for crop reports, which are often shared by industry players during specific spice events. [Nedspice](#) and [ITC Trade map](#) also publish upto-date information on national and international prices for coriander seeds.

Explore opportunities to cooperate with European processors, especially large ones that have the size and resources to invest. You can find European processors in the member lists of national spice associations in Europe. See the [member section of the European Spice Association](#) (ESA) for an overview of associations.

Check the [Food and Agriculture Organization of the United Nations](#) (FAOSTAT) website for production data.

5. What are the end-market prices for coriander seeds?

The global prices of coriander seeds tend to fluctuate. These fluctuations are dependent on several factors, as described below.

The retail prices of coriander seeds can go up to **€91.25 per kilo** when sold in small containers within the spice

and herb section of supermarkets (June 2018). Ground coriander seeds can go up to **€66 per kilo**.

Figure 4: Indicative price breakdown for coriander seeds sold in the spice and herb section of supermarkets

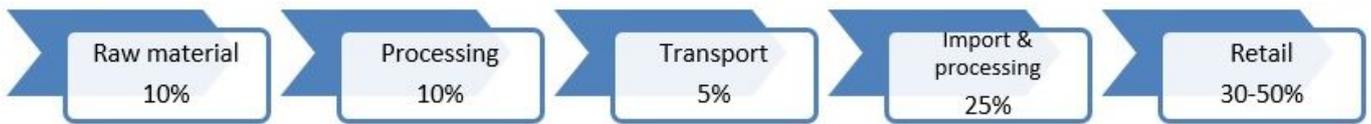


Figure 4 gives an indicative price breakdown for coriander seeds. Actual margins may differ, since these prices are influenced by various factors, such as the following.

- Country of origin as well as current and expected future harvest situation: for example, in the beginning of 2017, the prices in India for coriander seeds **decreased** significantly as production remained stable but export demand was weak.
- Quality of the raw material: for example, the higher the quality of your processed coriander seeds, the better your competition on the market and the higher your price could be.
- Level of demand: for example, prices are affected by the growing demand for coriander seeds in Europe.

Tips:

Check how the prices for coriander seeds on the market develop. Search the internet for recent reports. [Nedspice](#), [PBA Brokerage](#), [Indian Spice Board](#) and the [International Trade Centre](#) regularly publish useful reports on crops and prices.

Keep up to date about currency developments on such websites as [Oanda](#).

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