

# The European market potential for curcuma longa (turmeric)

The trend of healthier diets is likely to remain the leading driver of food market developments in the next decades. This trend will positively impact demand for spices such as curcuma. In terms of leading European destinations, the United Kingdom will remain the main market for curcuma longa by a long way. 1.4 million Indians, 1.1 million Pakistani, and 450,000 Bangladeshi live in the United Kingdom, and they traditionally eat a lot of curries with curcuma as primary ingredient.

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## 1. Product description

Curcuma longa (also known as turmeric) is a plant that is native to southern Asia, where it is widely cultivated. The plant is now also cultivated in the Americas. Curcuma longa production takes place in the following countries.

- India
- Pakistan
- China
- Haiti
- Jamaica
- Peru
- Taiwan
- Thailand
- Indonesia
- Madagascar

The roots and rhizomes (underground stems of the plant from which the roots grow) of curcuma longa are used in the following areas:

- Food (as a spice and as food additive for colour and flavour) and also in drinks
- Cosmetics
- Health products

Curcuma longa is available as several types of product on the European market. Food-grade powder (which has about 60-80 mesh particle size), powder capsules and high-potency tablets are the most common. Fresh turmeric rhizomes (Fresh curcuma) are also on the market for use in cooking.

Rhizomes are collected, boiled, dried and ground to make a yellow crude powder. This powder is also used to create an extract, which can be standardised on certain curcumin content, usually 93-95%. Such extractions can be encapsulated to create capsules, or tableted to produce tablets.

Since curcuminoids, the colour components of curcuma longa, deteriorate with light, it is important that ground turmeric and products such as capsules and tablets is packed in a UV protective packaging and stored appropriately.

This study focuses on food-grade curcuma longa predominantly *applied as a food or culinary ingredient*. Curcuma powder is a major ingredient in curry powders and pastes. It is also frequently used to colour and flavour mustard. It is also used in chicken bouillon and soups, sauces, gravies, and dry seasonings. Within the Combined Nomenclature (CN) classification, curcuma is covered under the code 0910.3000: Turmeric 'curcuma'.

### **Tips:**

See the [website of Turmeric World](#) for more information on composition, botany and uses of *Curcuma longa*.

Read our study on [Curcuma as a health product](#) to learn more about the opportunities in this market.

## **2. What makes Europe an interesting market for *curcuma longa*?**

### **The European market is growing**

Worldwide and also in Europe, the consumption of curcuma is forecast to increase by more than 10% per year in the next 5 years, in particular driven by the health benefits associated with curcuma. Europe is good for one fifth of the market, after North America. The growing curcuma market in Europe provides opportunities for exporters.

In 2018, the total European imports of curcuma reached 24 thousand tonnes. From 2017 to 2018, imports increased by 13% in volume and by 5% in value, reaching a total value of around €50 million.

In 2018, 80% of the total European imports were sourced directly from developing countries. Please note that Figure 1 below excludes countries other than European or developing countries, as that category of countries doesn't play a role in European trade.

Since curcuma cannot be produced in Europe, the European supplies illustrated in Figure 1 are all re-exports of curcuma originally coming from developing countries. European re-exports accounted for 20% of the total imports in 2018.

Because *curcuma longa* does not grow in Europe, demand must be met by imports. Figure 2 gives an overview of leading European importers of *curcuma longa*.

## **3. Which European countries offer most opportunities for *curcuma longa*?**

In 2018, United Kingdom remains the main market for curcuma in Europe with 30% of imports, followed by Germany with 19%, The Netherlands (16%), France (9%), Spain (6%), and Poland (5%). All of these countries more or less have the same characteristics in terms of applications. The foremost reason for the UK being the #1 importer is the fact that the largest diaspora of South Asians lives in the UK. South Asians are used to eating curries, of which curcuma is a key ingredient. Germany's position as #2 is rather logical, because Germany is simply one of the largest food markets in Europe. The Netherlands' third position in terms of imports is predominantly caused by the country's role of trader of spices within Europe.

Smaller countries with less than 5% of the European market, but fast-growing importers of *curcuma longa* from 2014 to 2018 include:

- Italy (share 2.6%, growth +15%)
- Belgium (2.3% / +12%)
- Austria (1.6% / +21%)
- Sweden (1.5% / +21%)

## The United Kingdom

The United Kingdom is the largest market for curcuma in Europe. The reason is simple: the United Kingdom has the largest diaspora of South Asians in Europe. The country is home to 1.4 million Indians, 1.1 million Pakistani, and 450,000 Bangladeshi. South Asians consume a lot of curcuma in their traditional diet of curries and spicy dishes. As these people prefer to eat traditional home-cooked dishes, they use a lot of spices and spice mixes (curries) in their kitchen, much more than most Europeans tend to use. While innovations such as ready meals etc. has also found inroads into the ethnic food market, probably still an above average share in this segment consists of spice mixes and pastes.

In the United Kingdom there is a good supply chain of products from South Asian origin destined for the ethnic South Asian population, developed by South Asian entrepreneurs. This is also valid for spices from India, among which is curcuma longa. Most of the curcuma is blended with other spices to make curry mixes and pastes and sold as such in supermarkets.

As Figure 2 shows, the United Kingdom had a remarkable growth of +53% in curcuma imports in 2018. This is most probably related with the coming Brexit and predicted impact on trade conditions. This is because the huge peak in imports stems from a sharp increase in imports from India. While the import volume was about 4 thousand tonnes in 2016 and 2017, it grew to 6.4 thousand tonnes in 2018. The European Union (EU) is India's largest trade partner, while the UK represents about 16 to 19% of that total value. The EU and India have been negotiating a Free Trade Agreement with India since 2007, but still have not come to a final agreement. Despite that, and despite the possibility that the UK and India will be able to secure a joint trade deal, there seemed to have been fears among spices and herbs importers that trade conditions would worsen after the Brexit.

Almost 90% of curcuma is imported directly from India, while the Netherlands takes second place with 4% share, far ahead of Spain, France, and Germany. Vietnam exported 46 tons of curcuma to the UK in 2018, while Nigeria's and Indonesia's exports of curcuma to the UK were almost the same.

Because of the high growth in United Kingdom's imports in 2018 (+54%), the average growth reached 18% per year in the period under review.

The UK's export volume is rather limited when compared with the import volume; with 748 tonnes in 2018 it was good for a bit more than 10% of the import volume. Leading export destinations are Germany (175 tonnes), the Netherlands, France and Ireland (each with between 90-100 tonnes), and Italy (63 tonnes).

The 2018 export volume of 748 tonnes was actually a drop from the 1000-1100 tonnes per year in 2016 and 2017. This reduction in export volume also proves that the increase in imports from Indian curcuma in 2018 was aimed at filling warehouses as much as possible, in anticipation of Brexit in spring 2019 (which was postponed in the end).

Last but not least, it should be noted that the United Kingdom is the #1 market for fairtrade certified products. This definitely offers opportunities for fairtrade certified spices exporters.

## Germany

Germany's position as the #2 market is logical because of the country's large population. The German market is, together with Switzerland, the most important market for organic certified spices, including curcuma. Having said this, it does not mean that organic volumes are significant; the volumes are still small but growth is higher than growth of the conventional spices market.

German imports of curcuma increased every year, although growth in 2018 was relatively small. 75% of the import volume is sourced in India, while 6% comes from Madagascar, 2.5% from Costa Rica and Peru, 2.3% from Thailand and about 1.5% from Nigeria and Myanmar. This shows that Germany's supply of curcuma is quite diversified, much more so than in the United Kingdom for example. With other countries such as Nicaragua, Guatemala, and Indonesia also supplying small volumes to Germany, Germany can be listed as a very high

potential market for small supplying countries of curcuma.

The only substantial supplying country from within Europe is the Netherlands, with 4% share in total German curcuma imports. Spain is a distant second with a 1% share.

One quarter of the import volume is re-exported to predominantly European countries. Germany's neighbouring countries are the leading destinations: Poland (23% share), Austria (16%), France (10%), the Netherlands (8%), Switzerland (4%) and Czech Republic (2%) together are good for 65% of German exports.

## The Netherlands

The Netherlands has a tradition of spice trade, dating back hundreds of years. This tradition has remained in place until today, as in 2018 Dutch exports of curcuma reached more than 2.6 thousand tonnes. This volume is equal to 75% of the country's import volume, meaning that only 25% is destined for the local market. Leading destinations are all European countries with Germany taking the 1st position (598 tonnes, 22% share), followed by Spain (341 tonnes), Italy and the United Kingdom (about 275 tonnes each).

If we zoom in on imports statistics, we see that Dutch imports of curcuma increased at a comparable pace to imports in Germany in the years 2015 and 2016. Imports peaked in 2017 at 4 thousand tonnes, but went down in 2018 to 3.8 thousand tonnes. The Netherlands has a particularly high share of imports coming from Peru. In 2018, imports from India dominated with 2.7 thousand tonnes, but imports from Peru took a firm 2nd position with 541 tonnes. Thailand and Costa Rica (new supplier since 2017) exported 69 tonnes and 44 tonnes to the Netherlands respectively. Imports from within Europe are negligible with UK at 37 tonnes and Germany and France at 17 and 15 tonnes respectively.

The Netherlands seems to be open for new opportunities and new supplying countries. This is not only proven by Costa Rica's recent supply increase, but also Nepal started to export recently (9 tonnes in 2018).

Vietnam exported 15 tonnes of curcuma to the Netherlands in 2018, which was considerably lower than in previous years (between 30-130 tonnes).

In the Netherlands, sustainable sourcing of spices is strongly supported by the [Dutch Spice Association](#).

## France

French imports remained relatively stable in the 2014-2016 period at 1.6 thousand tonnes. In 2017, however, imports jumped to a volume of 2.1 thousand tonnes, and remained stable at that level through 2018.

Direct imports of curcuma to France from developing countries are below the EU average of 80%. Supply of curcuma from India reached 1.4 thousand tonnes in 2018, good for 65% of French imports. Other direct supplies came from Peru (66 tonnes), Madagascar (65 tonnes), Brazil (44 tonnes), Thailand (38 tonnes), and Costa Rica (21 tonnes). In total, direct supplies accounted for 76% of French imports in 2018.

Leading suppliers from within Europe are Spain (150 tonnes in 2018, 7% share), the Netherlands (101 tonnes) and Germany (85 tonnes). Other supplies come from Italy and Belgium.

France is not an important trade hub for spices. While the country does export some, compared to imports it is quite limited. For curcuma, the export volume of 291 tonnes equals to 14% of the import volume. Export destinations consist predominantly of European countries. The UK represents almost one third of French exports, while the balance goes to a long list of European countries.

## Spain

Spanish imports have fluctuated considerably in the 2014-2018 period, but on average show an upward trend. Almost 1100 tonnes came from India in 2018, which is equal to 70% of the total imports.

Peruvian imports have remained remarkably low with 74 tonnes in 2018 (higher volumes were reached in 2014 and 2017), especially when taking into account Peruvian suppliers' language benefits. Furthermore, Vietnam entered the top 4 suppliers list to Spain in 2018 from scratch with 64 tonnes.

Intra-European supply is dominated by the Netherlands with 259 tonnes in 2018 (17% of total import volume). Supply from other European countries is small; Germany exported 30 tonnes to Spain, and France exported 15 tonnes.

Spain is an important supplier and re-exporter of spices within Europe. 36% of Spanish imports find their way to a long list of European countries. France is first on that list (154 tonnes or 38% of exports), followed by the United Kingdom and Italy (87 and 83 tonnes respectively), and Germany (57 tonnes).

As Spanish supply is less diversified than other European countries, Spain does not seem to be among the most interesting focus countries.

## Poland

Poland experienced the same trend in imports as France. Imports remained relatively stable in 2014-2016, and jumped to a higher level in 2017. Average growth reached 11% per year.

Surprisingly, Polish imports of curcuma predominantly come directly from developing countries. In total, 94% of the curcuma volume comes from developing countries. The main supplier is India (736 tonnes), followed by China (103 tonnes), Indonesia (30 tonnes), Peru (28 tonnes), Brazil (24 tonnes), and a few other countries such as Sri Lanka and Vietnam. Germany is the largest European supplier, but the volume is negligible (11 tonnes).

Poland exported 270 tonnes of curcuma in 2018. As a share of imports this was 27%. Main destinations were Germany (59 tonnes) and Croatia (52 tonnes), followed by Czech Republic, United Kingdom, Italy and Russia (each between 20 and 30 tonnes).

### Tips:

Check the latest developments on [ITC Trademap](#) or the [Indian Spices Board](#). ITC Trademap offers details of trade volumes and values, per year and per importing and exporting country. The Indian Spices Board's data predominantly cover details of Indian production and exports.

Target leading Western European importing countries of curcuma longa from developing countries. The most interesting are the United Kingdom, the Netherlands, Germany and France, while Poland could also be interesting. Note that the Indian Spices Board lists the United Kingdom and Germany as the [main European importers of Indian curcuma longa](#).

Also consider targeting smaller, fast-growing importers of curcuma longa, most notably Italy, Austria, and Belgium. Although their import volumes are smaller, they may be interesting enough to focus on for small to medium-sized exporters, as volumes would still be substantial for them.

## 4. What trends offer opportunities on the European curcuma longa market?

The trends that are explained below are visible all over Europe. At the same, the wealthier a country is, the more impact these trends have on the food and spices market. This means that the markets in Western Europe, namely United Kingdom, the Netherlands, Germany and France, feel the most impact of the following trends. In Spain, the impact of these trends can be rated as medium, while in Poland the impact of these trends is still low.

## The trend of healthier diets

European consumers are becoming increasingly health-conscious consumers. They look for healthy products and avoiding products that are considered unhealthy. Unhealthy ingredients are predominantly salt, sugar, and fat. Salt can be substituted by spice and herbs mixes, of which curcuma is often an ingredient.

Furthermore, curcuma is also considered as a natural yellowish colouring additive and the food industry increasingly uses it as an ingredient to colour cheese, mustard, butter, yellow cake mix, and popcorn. Adding curcuma to many special diet plans (in example the chrono, paleo, and keto diets) is [promoted](#) to reduce inflammation, boost mood, reduce blood sugar, improve heart health and inhibit tumour growth.

This trend is likely to remain the leading driver of food market developments in the next decades and will positively impact demand for spices such as curcuma.

### Tips:

Focus on the application of your curcuma in healthy product ranges.

Promote your product as healthy ingredient and stress the benefits of your curcuma in people's diets.

## A changing perception of health

Consumers' changing understanding of what it means to be healthy is driving consumption of curcuma longa. Instead of the absence of illness, consumers use healthy products to prevent diseases and feel good, for example by drinking herbal tea or [smoothies with spices such as curcuma](#).

Consumers who like to discover new tastes, new cuisines, exotic products, etc further drive this development. This goes hand in hand with some other developments, such as:

- Growth of global tourism. More [Europeans travel to exotic destinations](#) every year, and more foreigners come to Europe every year.
- Growth of the ethnic food market across Europe. Curcuma is a spice present in nearly every Indian dish as well as many other oriental cuisines.
- Growing consumption of so-called 'superfoods'. Superfoods are ingredients with a particular benefit and curcuma is one of them. In particular [Peru is using the term 'superfoods'](#) to promote the country's large range of healthy ingredients, among which includes curcuma longa.
- On-going popularity of TV cuisine programs like [Master Chef](#) encouraging cooking at home and experimenting with different products.
- Popularity of [Ayurveda](#) in Western Europe: [golden milk](#) is a beverage with milk and curcuma recommended for treating illnesses and keeping people healthy.

## More demand for organic certified spices and herbs

European demand for organically produced spices and herbs continues to grow. However, the total market share for organic curcuma longa is still believed to be small (less than 5%). The organic curcuma longa market is forecast to grow faster than the conventional market. At the same time, the share will remain small. It will probably take 10 years from now before a 10% market share will be reached.

One of the companies that has benefited from the strong organic market growth is [La Campina](#), a farmer's cooperative of organic-certified farmers in Peru. This company has contributed very strongly to Peru's successful export expansion strategy for the curcuma superfood.

## Tips:

Look for potential buyers that focus more on the health food markets instead of the traditional segments.

Find a way to better promote your country's spices and take into account the health benefits of using spices. This should be coordinated by your national association. Also learn from best practices in the sector, most notably Peru's sector branding strategy.

Check whether there is sufficient demand for an organic version of your curcuma longa. Talk to your (potential) buyers to see whether they are interested in certified curcuma longa. Look for companies that trade in certified curcuma longa online or at trade fairs, for example among exhibitors at [Biofach](#), an organic trade fair, or look for organic importers on the [website of the International Trade Centre](#).

If your curcuma longa does not have organic certification, promote the sustainable aspects of your production process. Buyers might ask you to support your claims with certification or documentation on your sourcing practices and/or your corporate social responsibility (CSR) practices. Our [buyer requirements for spices and herbs](#) study provides you with more information on certification standards.

Be careful on how you frame the superfood status of your curcuma longa in your marketing materials. The term 'superfood' is not an authorised health claim in Europe. European companies may only use this term on their label if it is part of their brand name.


See our study on [Exporting curcuma longa as a natural ingredient for health products to Europe](#) for more information on trends related to health and superfoods and see our study of [Trends for spices and herbs for more information](#) on trends on the European market for spices and herbs.


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