

The Swiss market potential for cocoa

Switzerland has a strong reputation as a producer of high-quality chocolates. Several Swiss chocolate brands are well known internationally, including Lindt and Toblerone. As such, Switzerland is among the largest chocolate exporters in the world. The domestic market is also strong: Swiss consumers record the world's highest per capita chocolate consumption.

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1. Product description

The cocoa tree (*Theobroma cacao*) grows in tropical areas, between 15 and 20 degrees latitude north and south of the equator, in Africa, Asia and Latin America. Cocoa pods grow directly from the trunk and thicker branches of the tree. After extraction from the pod, cocoa seeds (beans) are fermented and (sun) dried. A cocoa producing tree can deliver on average 7-9 kg of dry beans per year.

The three main varieties of the cocoa tree as distinguished by the international cocoa market are:

1. *Forastero* is the predominant cocoa variety. It is mainly cultivated in Africa, but also in Central and South America. It accounts for around 80% of global cocoa production. *Forastero* grows faster and has a higher yield than other cocoa varieties. The beans have a strong, earthy flavour. Generally, bulk cocoa beans come from *Forastero* trees. Well-known *Forastero* subspecies are *Amelonado* and *Nacional*. *Nacional* trees in Ecuador produce fine flavour cocoa.
2. *Criollo* (original cocoa tree) is mainly grown in Central America, northern South America, the Caribbean and Sri Lanka. *Criollo* makes up around 5% of global cocoa production. The beans have a delicate and sweet flavour. *Criollo* is often mixed with other varieties when making chocolate, given that it is scarce and expensive. Fine flavour cocoa beans are produced from *Criollo* cocoa trees. Well-known varieties are *Chuafo*, *Porcelana* and *Ocumare*.
3. *Trinitario* is mainly cultivated in Central and South America, the Caribbean and Asia. The beans are a hybrid of the *Criollo* and *Forastero* trees. This variety represents around 10-15% of global cocoa production. The beans have a floral, fruity flavour. The cocoa beans from *Trinitario* trees are classified as fine flavour cocoa. There are exceptions, however, as Cameroonian cocoa beans produced from *Trinitario* trees are classified as bulk cocoa beans. Well-known varieties are *Carenero*, *Rio Caribe* and *Sur del Lago*.

The focus of this document is on cocoa beans (whole or broken, raw or roasted), which corresponds with HS code 1801. Harmonised System (HS) codes are used to classify products and to calculate international trade statistics, such as imports and exports.

Cocoa bean derivatives (cocoa paste, cocoa butter and cocoa powder) are covered in [our study on semi-finished cocoa products in Europe](#).

2. What makes Switzerland an interesting market for cocoa?

Switzerland has a strong reputation as a producer of high-quality chocolates. The country is among the largest chocolate exporters in the world. The Swiss domestic chocolate market is also strong: Swiss consumers mark the highest per capita consumption worldwide.

Switzerland has world's highest per capita chocolate consumption

Although chocolate consumption in Switzerland has been decreasing slightly in the past years, Switzerland still has the highest per capita consumption in the world. In 2018, per capita consumption was 10.3 kilograms, 1.4

kilograms lower than five years before. To compare, Germany registered the world's second-highest per capita consumption at 9.2 kg.

The decline in per capita consumption is in part because [Swiss consumers increasingly enjoy chocolate in smaller quantities and of higher quality](#). There is particularly a growing interest in dark chocolate. As such, both the consumption quantities and preferences in Switzerland offer interesting opportunities for cocoa exporters.

Switzerland is a relatively large importer of cocoa beans

Switzerland is the eighth-largest European importer of cocoa beans, importing about 45 thousand tonnes in 2018, at a value of €108 million. To compare, the Netherlands is the largest importer with an estimated 1,173 thousand tonnes that same year, followed by Germany (469 thousand tonnes) and Belgium (234 thousand tonnes).

Over 99% of imports by Switzerland are sourced directly from producing countries. The largest cocoa suppliers are Ghana (57%), Ecuador (23%) and Ivory Coast (7.3%). Swiss import volumes of cocoa beans increased slightly between 2014 and 2018, at 1.0%, while the import value remained stable.

Switzerland houses a strong chocolate-manufacturing industry

Almost all cocoa beans imported into Switzerland are used domestically for further processing. In 2018, [the Swiss grinding industry processed an estimated 44 thousand tonnes of cocoa](#) (an estimated 1.0% of total global grindings). Examples of large companies that engage in cocoa grinding in Switzerland are [Barry Callebaut](#), [Lindt & Sprüngli](#), [Nestlé](#), [Stella Bernrain](#) and [PRONATEC](#).

Processed cocoa beans are used for the manufacturing of chocolate. [Only ready-conched chocolate or chocolate mass entirely manufactured in Switzerland may be called 'Swiss chocolate'](#).

Switzerland is home to 17 chocolate manufacturers and many small and medium-sized chocolate makers. The largest manufacturers are [Barry Callebaut](#) and [Lindt & Sprüngli](#). These multinationals were both founded in Switzerland. [Chocolat Frey](#), part of the [Migros Group](#), is also a major producer of chocolate for Migros' own popular private label brand [Chocolat Frey](#).

Swiss chocolate exports keep on increasing

In 2018, [Switzerland accounted for 3.0% of global chocolate exports](#), making it the world's tenth largest exporter. Chocolate export volumes reached over 122 thousand tonnes in 2018, at a value of €732 billion. Between 2014 and 2018, exports increased slightly at an average annual rate of 1.2% (value at 2.8%). The main export markets for Swiss chocolate in 2018 were Germany (24%), the United Kingdom (11%), France (9.1%) and Canada (8.6%).

Swiss chocolate remains popular, and new Swiss chocolate export deals continue to be made. For instance, as of 2019, [Chocolat Frey](#) (the brand of the Swiss retailer [Migros](#)) [is sold in about two thousand shops of the US-based supermarket chain Walgreens](#).

Although exports increased the past years, [domestic consumption of Swiss chocolate fell by 3.4% between 2017 and 2018](#). The Swiss are increasingly eating imported chocolate products, at the cost of domestically produced Swiss chocolate. In 2018, the share of imported chocolates consumed in Switzerland reached 41%.

Tips:

If you use Chrome as a web browser, read [here](#) how you can translate this study, or any of the articles referred to in this study, into another language.

Check the website of the [Swiss Chocolate Industry Association \(CHOCOSUISSE\)](#) to learn more about the chocolate industry in Switzerland.

Access the [ITC Trade Map](#) to analyse European and Swiss trade dynamics yourself and to build your export strategy. By selecting Switzerland as your target market, you will be able to follow developments such as the emergence of new suppliers and the decline of established ones.

See our study of [trade statistics for cocoa](#) for more detailed information about the European trade in cocoa beans.

3. Which trends offer opportunities on the Swiss market?

In 2018, the Swiss Platform for Sustainable Cocoa was founded. Its members, including the large industry players, have committed to sourcing at least 80% of cocoa from sustainable production by 2025. Sustainability is also a key theme for consumers: the Swiss market for organic and fair-trade cocoa is relatively large compared to other countries.

Swiss consumers demand high-quality, premium products

[Swiss chocolate consumers increasingly prefer high-quality dark chocolate](#). This is especially the case in the French-speaking part of Switzerland, where [66% of chocolate consumers prefer dark chocolate](#). In German-speaking Switzerland, milk chocolate is still the preferred product by 70% of consumers.

The premiumisation of chocolate products is visible across different segments. For instance, on the lower end, retailer Coop offers [organic and Fairtrade-certified single origin chocolate](#) under its own private label brand. The private label line of retailer Migros also includes [a diverse offer of premium products](#), for affordable prices.

Lindt & Sprüngli also continues to innovate their offer of premium chocolates in Switzerland. In 2018, the brand launched products focusing on a high cocoa content ([Dark Competence](#)) and on new snacking formats ([Fruit Sensation](#)).

In the high-end market, [there is a growing number of bean-to-bar chocolate makers in Switzerland](#). Examples of Swiss bean-to-bar makers are [Choba Choba](#), [La Flor](#), [Orfeve](#) and [Sadé Chocolat](#). These chocolate makers source their cocoa beans directly from origin.

There is also a large range of premium chocolate shops in Switzerland, including well-known ones such as [Teuscher](#), [Max Chocolatier](#) and [Gysi](#).

Organic and fair-trade cocoa are very important on the Swiss market

Switzerland is an [interesting market for fair-trade](#) and organic cocoa, as there is a strong ethical push from Swiss consumers to buy these products. Swiss per capita consumption of organic products (including chocolate) [was estimated at €288 in 2017](#), which made it the highest worldwide. Between 2016 and 2017, the Swiss organic retail sales increased by an average of 8.1%.

The Swiss also registered the world's highest per capita consumption of fair-trade products, with an [estimated €91 per person spent on fair trade products in 2017](#). Sales of fair-trade cocoa and chocolate products in Switzerland has risen sharply over the years, [registering a growth rate of 71% between 2016 and 2017](#). In 2018, Switzerland sold 4.5 thousand tonnes of Fairtrade-certified cocoa products, which is [7% of the country's total cocoa and chocolate products](#).

Examples of Swiss chocolate companies producing fair-trade and organic chocolates are [Durig Chocolatier](#)

Lausanne and [Stella Bernrain](#) (which mainly produces under private label). About [70% of all products produced by Stella Bernrain are organic](#).

Retailers are also increasingly demanding organic and/or fair-trade certified products. [Coop](#) is currently the largest Swiss retailer selling Fairtrade and organic-certified products. As part of Coop's sustainability policy, all [chocolate products sold in their shop are Fairtrade-certified](#).

Sustainability is key in the Swiss cocoa and chocolate sector

The [Swiss Platform for Sustainable Cocoa](#) was founded early 2018, with the aim of promoting sustainability in the cocoa value chain. Over forty actors from the cocoa and chocolate sector actively participate in this initiative. One of the main goals is to ensure that 80% of Swiss cocoa imports are produced sustainably by 2025. The large multinational [Barry Callebaut](#) was one of the founding members.

Besides this sector-wide initiative, most chocolate companies based in Switzerland have their own sustainability strategies. Examples include Barry Callebaut's [Forever Chocolate](#) programme, Nestlé's [Cocoa Plan](#), Lindt & Sprüngli's [sustainable sourcing programme](#) and Felchlin's [Fair direct cacao](#) strategy.

Major companies also fully endorse certification schemes. For instance, all cocoa sourced by [Maestrani](#) is certified by either [Fairtrade](#), [Rainforest Alliance/UTZ](#) or [Hand in Hand](#).

Swiss consumers increasingly chose healthier chocolate products

Dark chocolate currently accounts for approximately 35% of chocolate consumption in Switzerland, [with a strong trend towards the dark chocolate consumption percentage increasing further](#). This trend is in part driven by consumer preferences for healthier products.

Chocolate makers are responding to this health trend by increasingly offering sugar-free, sugar-reduced and vegan chocolate products. For instance, the Swiss chocolate maker [Löv Delights](#) produces premium vegan chocolates. Lindt & Sprüngli created [a sugar-free line with stevia](#), and Nestlé adapted its recipe for its [Cailler](#) chocolate brand [to contain less sugar](#).

Tips:

See [our study on trends for cocoa](#) to learn more about current trends on the European market.

Promote sustainable and ethical aspects of your production process. Support these claims with certification. See [our study on doing business with European buyers of cocoa](#) for more tips on marketing and promotional aspects of your cocoa.

Before engaging in a certification programme, make sure to check (in consultation with your potential buyer) that this label has sufficient demand in your target market and whether it will be costbeneficial for your product.

Find potential business partners in Switzerland by checking the lists of [Swiss Rainforest Alliancecertified brands](#), [UTZ certified cocoa supply chain actors](#), [Fairtradecertified operators](#) and [organic chocolate producers](#).


Focus on the premium, specialty, and fine flavour cocoa market in Switzerland. You can only access the premium cocoa market if you offer highquality cocoa. See the chapter about quality requirements below to learn more.

Want to put premium cocoa on the Swiss market? Try to establish direct trade relationships with smaller traders and chocolate makers.


This study has been carried out on behalf of CBI by [ProFound – Advisers in Development](#).

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