

# Entering the European market for curcuma

There is a strong and growing demand for curcuma longa in Europe. But competition is fierce, especially from suppliers from India. Therefore, scale of production and processing is important to enter the market. While India is the largest supplier to the European market by a long way, in the last decade some other supplying countries have also gained a position in the European market. The main one is Peru, which is successfully promoting curcuma under the umbrella of 'Superfood from Peru'. Peru's share in imports is 5%, while the third 'newcomer' country is Madagascar, although its share is still small.

## Contents of this page

1. [Which requirements should curcuma longa comply with to be allowed on the European market?](#)
2. [Through what channels can you get curcuma longa on the European market?](#)
3. [What competition do you face on the European curcuma longa market?](#)
4. [What are the prices for curcuma longa?](#)

## 1. Which requirements should curcuma longa comply with to be allowed on the European market?

### What are the mandatory requirements?

All foods sold in the European Union, including curcuma longa, must be safe. This applies to imported products as well. Additives must be approved. Harmful contaminants, such as pesticide residues, and excessive levels of mycotoxins or preservatives are banned. It should also be readily obvious from the labelling whether a food contains allergens.

### Official border control for curcuma longa imported to the European Union

Official food controls include regular inspections that can be carried out at import or at all further stages of marketing. In case of non-compliance with the [European food legislation](#), individual cases are reported through the [Rapid Alert System for Food and Feeds](#) (RASFF), which is freely accessible for the general public.

You should be aware that repeated non-compliance with the European food legislation by a particular country may lead to special import conditions or even suspension of imports from that country. Those stricter conditions include laboratory test results for a certain percentage of shipment from specified countries.

The European Parliament and Council adopted the [New Official Controls Regulation](#), which will enter into force in December 2019. New official controls regulation will extend its scope to organic products. Exporters from third countries will use the single standard Common Health Entry Document for the prior notification of exports.

### Contaminants control in curcuma longa

A [European Commission Regulation](#) sets maximum levels for certain contaminants in food products. This regulation is frequently updated and apart from the limits set for general foodstuffs, there are a number of specific contaminants limits for specific products including curcuma longa. The most common requirements regarding contaminants in curcuma longa are related to presence of pesticides residues, mycotoxins, heavy metals, microbiological organisms and food additives. Contaminant levels shall be kept as low as can reasonably be achieved following recommended good working practices.

### Mycotoxins

Presence of mycotoxins (aflatoxins and ochratoxin A) was the main reason for banning curcuma longa from the European market until 2012. The maximum level of aflatoxin for curcuma longa must be 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 ([CELEX 32006R1881](#)).

## Pesticides Residues

The European Union has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticide residues than allowed will be withdrawn from the European market. However, excessive residues of pesticides are not very frequent case in trade with *Curcuma longa*. The European Union regularly publishes [a list of approved pesticides](#) that are authorised for use in the European Union. This list is frequently updated.

## Microbiological contaminants

Although there were some notifications of *curcuma longa* issues in the RASFF database in recent years, the number of issues with curcuma is relatively limited. This was different in the 2010-2012 period, when there were several border rejections of curcuma from India because of aflatoxins.

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

## Food additives

Buyers and European authorities can reject products if they have undeclared, unauthorised or too high levels of extraneous materials. There is specific legislation for [additives](#) (like colours, thickeners) and [flavourings](#) that list what E-numbers and substances are allowed for use. Additives that are authorised are listed in Annex II to the [Food Additives Regulation](#).

Although you might consider using food additives in the production of *Curcuma longa*, keep in mind that European traders and consumers require spices that are additive-free.

### Tips:

Follow Codex Alimentarius [Code of practice for the prevention and reduction of mycotoxins in spices](#) and [Code of Hygienic Practice for Low-Moisture Foods](#). 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.

Always discuss with your potential buyers whether they want steam sterilisation. If you cannot sterilise your *curcuma longa* yourself, look for local sterilisation companies that can provide this service for you. Keep up to date on the development of alternatives to steam sterilisation by checking online sources such as [GreenFooDec](#).

For the control of contaminants use only services of laboratories that are [ISO/IEC 17025](#) accredited. Presence of aflatoxins must be tested according to the EU regulation on [methods of sampling and analysis for the official control of the levels of mycotoxins](#) in foodstuffs.

Read more about MRLs on the European Commission [website on Maximum Residue Levels](#). To be prepared for potential new changes in the MRLs, read the [Ongoing Reviews of MRLs in the European Union](#).

Check the [Rapid Alert System for Food and Feed \(RASFF\) database](#) for examples of *curcuma longa* withdrawn from the market and the reasons behind these withdrawals. However, you should keep in mind that withdrawals can occur and avoid them at all costs. A withdrawal will influence the reputation of your company as well as the reputation of your country as a *curcuma longa* supplier.

## What additional requirements do buyers often have?

Consider complying with the following non-legal requirements to ease market access. European buyers can use these requirements as selection criteria.

- Food safety certification as a guarantee: Many EU buyers (e.g. traders, food processors, retailers) require the implementation of a (HACCP-based) food safety management system.
- The most important food safety management systems in Europe are British Retail Consortium ([BRC](#)), International Featured Standards ([IFS](#)), Food Safety System Certification 22000 ([FSSC 22000](#)) and the Safe Quality Food programme ([SQF](#)). Always verify your buyer's preference for a specific food safety management system, as some may prefer one system to the other. For example, retailers in the United Kingdom have developed BRC. For that reason, BRC is more commonly demanded in the United Kingdom than in other countries. If you want to target the United Kingdom, BRC may be more important.
- Corporate Social Responsibility (CSR): 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 the Business Social Compliance Initiative code of conduct ([BSCI](#)).

## Quality requirements

Product quality is a key issue for buyers in Europe. You need to comply with the [Quality Minima Document](#) published by the [European Spice Association](#) (ESA). This document is leading for the national spice associations affiliated with the ESA and for most key buyers in Europe.

The Quality Minima Document specifies the chemical and physical parameters that dried curcuma longa needs to comply with when sold in Europe before crushing and grinding (after drying):

Whole:

- ash: maximum 8%
- acid insoluble ash: maximum 2%
- moisture: maximum 12%
- volatile oil: minimum 2.5 ml/100 gr

Ground:

- ash: maximum 9%
- acid insoluble ash: maximum 2.5%
- moisture: maximum 10%
- volatile oil: minimum 1.5 ml/100 gr

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:

Check the [main page of ISO's Technical Committee #34/SC 7](#) from time to time. This committee develops standards for spices, culinary herbs and condiments, and the page offers an overview of which standards the committee is working on. Also the finished standards can be found there, such as [ISO standard 5562-1983](#) which describes a whole range of specifications for many spices, including curcuma.

Check ESA's [Quality Minima Document](#) for more information on the chemical and physical parameters that your unprocessed Curcuma longa needs to comply with when it is sold in Europe.

In addition to the quality requirements mentioned here, please refer to our study about [buyer](#)

[requirements for spices and herbs](#) for a general overview of buyer requirements in Europe.

## Labelling requirements

Each export package shall declare:

- Name of product, e.g. 'curcuma longa'
- Batch code
- Net weight in metric system
- Shelf life of the product or best before date, and recommended storage conditions.
- Lot identification number
- Country of origin and name and address of the manufacturer, packer, distributor or importer

Lot identification and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark.

A label can also include details such as brand, drying method, harvest date etc.

In the case of retail packaging, product labelling must be in compliance with the [European Union Regulation on the provision of food information to consumers](#). This regulation defines nutrition labelling, origin labelling, allergen labelling and minimum font size for mandatory information more clearly.

You also need to give your buyer the Technical Data Sheet (TDS). Check this example for [curcumin powdered extract](#).

If you supply organic curcuma longa, your label needs to include the name/code of the inspection body and certification number.

### Tip:

See our study of the [European market for consumer packed spices and herbs](#) to find requirements for consumer packaging and labelling. In Europe, there are very strict requirements for the packaging and labelling of consumer products, which differ from the requirements mentioned here.

## Packaging requirements

For bulk shipping, curcuma longa should be packaged in jute sacks (36-65 kg). It is less common but also possible to pack the roots in wooden boxes / pallets or linen corrugated cardboard boxes (60 kg).

Curcuma longa is packaged in multi-wall laminated bags of different weights ranging from 1 to 25 kg. Common weight classes are 12.5 kg and 25 kg.

### Tips:

Always ask your buyer for their specific packaging requirements.

Store packaged curcuma longa in a dry, cool place to prevent quality deterioration. If you offer organic certified curcuma longa, physically separate it from curcuma longa that is not certified.

Use containers of a material that does not react with extract components (e.g. lacquered or lined steel, stainless steel, aluminium). Clean and dry the containers before filling them with curcuma longa.

When bags are marked, food-grade ink should be used to minimise the potential for contamination with ink. It is recommended that paper tags be used instead of liquid ink for marking.

Make sure that the materials that you use for packaging are impermeable to moisture and air. Sealing machines can be used to seal the bags.

## What are the requirements for niche markets?

### Organic Curcuma longa

If you want to sell curcuma longa as organic in Europe, it must be grown using organic production methods that meet the [European legislation](#). Growing and processing facilities must be audited by an accredited certifier. Only after certification you may put the European Union's organic logo on your products. The same goes for the logo of the standard holder, for example, [Soil Association](#) in the United Kingdom or [Naturland](#) in Germany.

Note that importing organic products to Europe is only possible with an [electronic certificate](#) of inspection (e-COI). Each batch of organic products imported into the EU has to be accompanied by an electronic certificate of inspection as defined in Annex V of Regulation [defining imports of organic products from third countries](#). This electronic certificate of inspection has to be generated via [Trade Control and Expert System](#) (TRACES).

### Sustainability certification

Two most commonly used sustainability certification schemes are [Fair Trade](#) and [Rainforest Alliance](#). Fair Trade international has developed a specific [standard for herbs, herbal teas and spices](#) for small-scale producer organisations. According to this standard, a premium price of 15% over and above the negotiated price between producer and seller must be established.

In order to improve sustainable production and sourcing of spices, a group of mainly European companies and organisations formed the [Sustainable Spice Initiative](#) in 2012. The major objective of this initiative is to strive for fully sustainable spice production and trade in the sector.

### Tips:

For the overview of the developments of the sustainability initiatives in the European spices market read our study on [Trends on the European Spices and Herbs Market](#).

Work together with European buyers, non-governmental organisations, national or international governmental organisations to make it economically feasible for you to receive certification. Further information is available on websites such as the [Sustainable Spice Initiative](#), the [Netherlands Enterprise Agency](#), the [German Ministry for Economic Cooperation and Development](#) and [Cordaid](#).

Check the [guidelines for imports of organic products into the European Union](#) to familiarise yourself with the requirements for European traders.

Seriously consider organic curcuma production. Although the organic curcuma market is still small, organic certification can offer opportunities for curcuma longa producers. Several companies from Peru have jumped into this market in the past decade, and they booked good successes.

Familiarise yourself with the concept of self-verification. Self-verification means that suppliers assess their own compliance with the sustainability code of buyers. Examples include Unilever's [Sustainable](#)

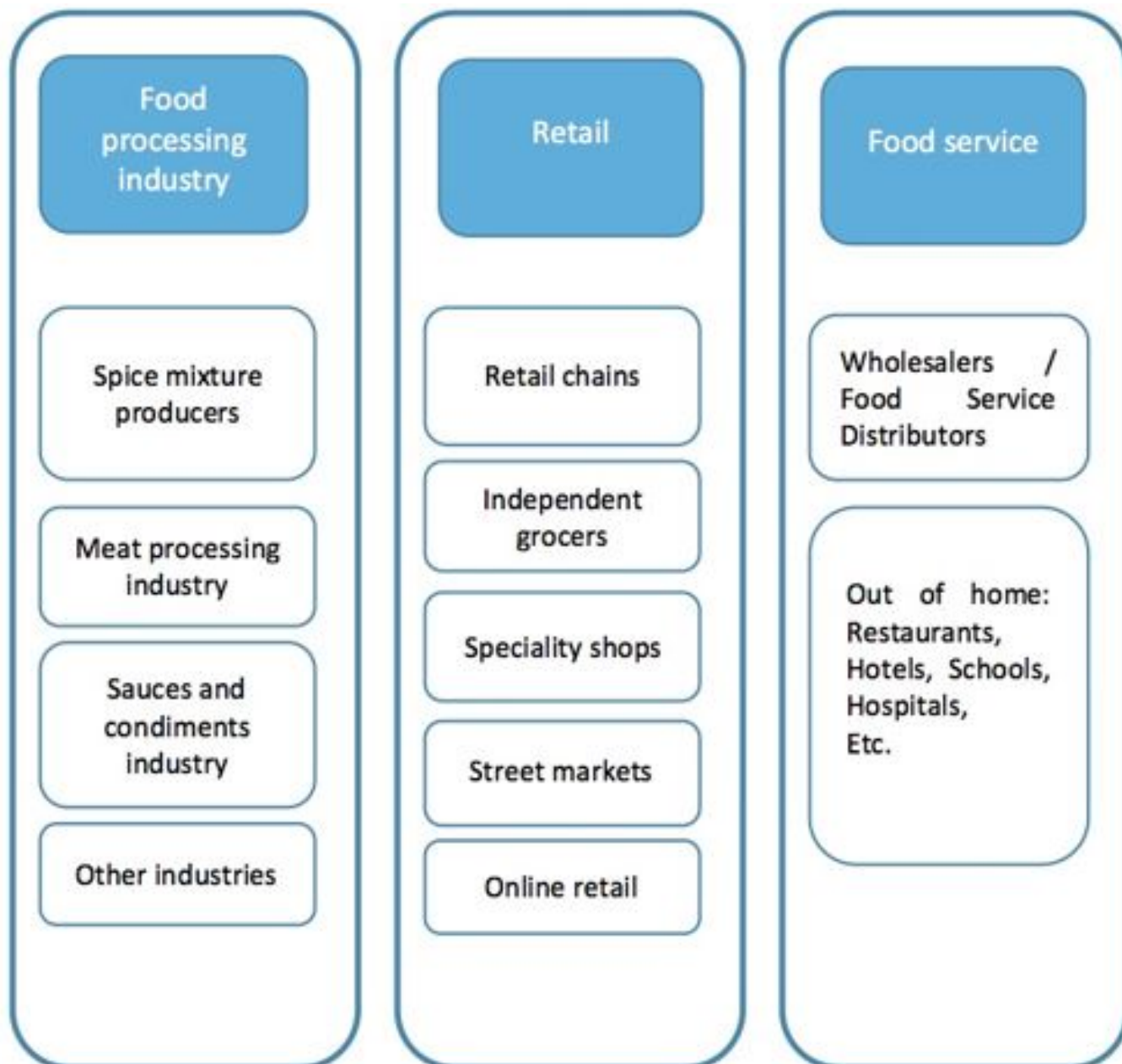
## 2. Through what channels can you get curcuma longa on the European market?

The European food industry uses curcuma longa in significant quantities, especially as a part of curry powder. The curry powder is a mix of several spices and curcuma is responsible for the yellowish colour. Curry powder is used as a spice mix for meat, sauces, soups, ready meals, etc. Also, it is used in the Moroccan spice mix called Ras-El-Hanout, and another ethnic cuisine spice mix with curcuma is the Iranian mix called 'Advieh'. Also, curcuma is used to colour food products such as cheese, mustard, butter or margarine, cake mixes, etc.

### How is the end market segmented?

The largest user of curcuma longa in Europe is the food processing industry, followed by retail, foodservice and food ingredients (additive segments).

Figure 1: End market segments for Curcuma longa in Europe



## Food processing segment

The food processing segment is roughly estimated to use 60-70% of all curcuma longa in Europe. The largest users within the food-processing segment include spice mixture producers, meat industry and the sauces and seasonings industry.

Spice mixture producers are companies specialised in production of spices and seasonings for different applications. Those companies are constantly investing in research to develop custom formulations for food processing companies and help launching new attractive tastes. They produce either dried or liquid spice ingredients. Some examples of such companies in Europe are [AVO](#) (German producer, also one factory in Poland and in France), [Meat Cracks](#), [Kerry Ingredients](#), [Frutarom](#) (part of IFF), [Farevelli Group](#), [Food Ingredients Group](#), [Kalsec](#), [EHL Ingredients](#) or [Ion Mos](#).

The meat industry is an important user of curcuma longa, though it is often not supplied directly but through spice and food ingredient companies. However, larger groups of companies may import curcuma longa directly. Example of such a group includes [OSI Food Solutions](#). Mostly, the curcuma is part of a customised mixture to spice chicken meat.

The European sauces and condiments industry is also an important user of curcuma longa. However, this



market is dominated by international brands such as Kraft Heinz, McCormick, and Maggi (Nestle).

## Retail segment

The retail and foodservice segments for spices and herbs are dominated by European (often national) spice brands/companies, such as [Fuchs](#) in Germany, [Verstegen](#) and [Euroma](#) in the Netherlands, [Santa Maria](#) in Scandinavian countries and multinational brands such as McCormick, Kraft Heinz, etc. For example, the Dutch spice specialist [Silvo](#) has been part of McCormick since 2004. Also, some strong brands are developing in South East Europe, such as [Prymat Group](#). These spice companies directly import spices from all over the world and have in-house processing and R&D facilities.

Private label (supermarket) brands are important as well. European spice packers and blenders conduct production for all these brands. Since supermarkets often require large quantities and have very specific requirements regarding packaging, it is very difficult to supply them directly from outside Europe. Products already packed in origin countries are mainly found in European ethnic supermarkets, open-air markets, and webshops.

The retail sector can be further segmented into supermarkets, independent grocers and specialty shops. Most retailers sell individually packed spices or herbs and also a range of specific mixtures. Overall, tailored spice and herb mixtures are becoming more popular in the retail segment, partly due to the increasing interest in ethnic food but also due to the growing demand for convenience.

Leading supermarket chains in Europe include Tesco, Carrefour, Lidl, Metro, Aldi, Delhaize, Rewe, Edeka, Auchan and Albert Heijn.

## Foodservice segment

The foodservice segment (hotels, restaurants and catering) is usually supplied by specialised importers or wholesalers. These companies are sometimes the same as the brands that supply the retail segment. The foodservice segment often requires larger packaging sizes of curcuma longa, e.g. cans from 300 to 500 grams or sacks of a few kg.

World cuisines, healthy food and food enjoyment are the major driving forces in the foodservice channel in Europe. The fastest-growing business types are likely to be new (healthier) fast food, street food, pop up restaurants, international cuisines and sandwich bars.

## Through what channels does the curcuma reach the consumer?

Spice importers represent the most important channel for curcuma longa in Europe by a long way. However, sometimes, curcuma longa can be placed on the market through an agent or directly supplied to food processors or food service companies. Some wholesalers also have packing facilities and usually supply private label spices and herbs.

## Importers / Wholesalers

Importers and wholesalers can be general spice importers or specialised importers. Some now exclusively deal with ingredients aimed at the food-processing industry while others pack spices and spice mixes for retail chains. Some importers also deal with a broader range of products apart from spices, such as beans, seeds, dried fruits and nuts.

An important trend is the growing pressure that retailers put on their suppliers (importer and food manufacturers). The higher requirements from the retail industry determine the supply chain dynamics from the top down the chain. Pressure is translated into lower prices but also added value aspects such as 'sustainable', 'natural', 'organic', or 'fair trade' products. Transparency in the supply chain is needed. To achieve this, many importers develop their own codes of conducts and build long-lasting relationships with preferred developing country suppliers.

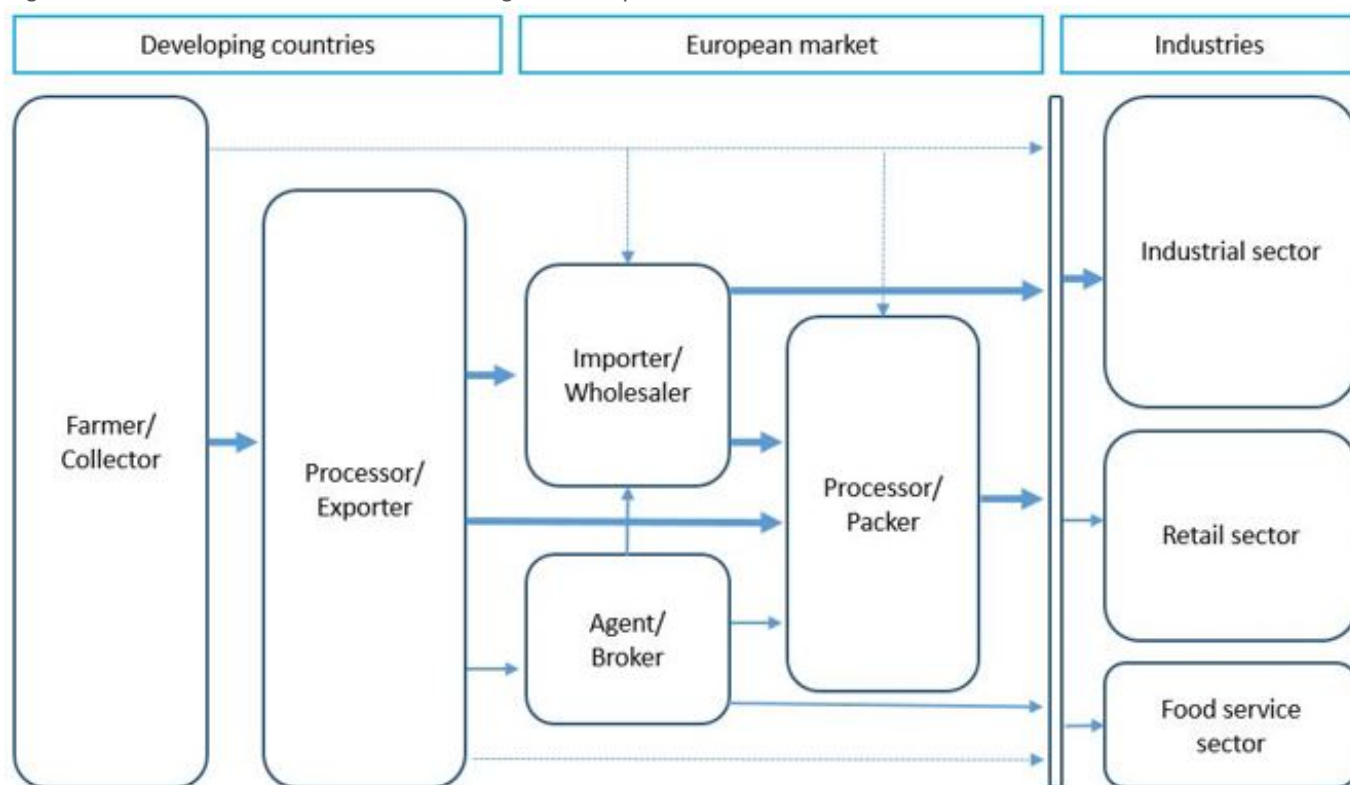


Examples of bulk importers of curcuma longa in Europe include [Albarracin](#) (Spain), [Nedspice](#) (the Netherlands), [European Spice Services](#) (Belgium), [Husarich](#) (Germany) or [Saran Enterprises](#) (Poland).

Examples of specialised importers that are using curcuma longa in different spice mixtures include [Culinar](#) (Sweden), [Epos](#) (the Netherlands – the only producer in Europe with a range of allergen-free blends), and [Colin Ingredients](#).

Examples of spice importers that are supplying several different segments include [Isfi Spices](#) (Belgium) and [Verstegen](#) (Netherlands).

Figure 2: Trade channels for curcuma longa in Europe



## Agent/broker

Brokers and agents are intermediaries who bring buyers and sellers together. They charge a commission for their services. European buyers can be trading companies, but they are mostly processors. Agents and brokers are interesting when you have a specialised product (such as high quality or sustainably certified) for which buyers are harder to find. The role of the agent is slowly diminishing due to the increased transparency demanded by the market.

### Tips:

Download the [members list](#) (PDF file) of the European Spice Association (ESA). The first pages list the several national spices associations that are member of the ESA. From page 2 on there is a long list of so-called 'full member companies'. Many of these companies are dedicated spices and herbs traders and packers. In the document these companies are grouped per European country.

Search the list of exhibitors of the specialised trade fair [Fi Europe](#). This fair is the leading event in Europe where all ingredients companies in Europe gather. It takes place every year. In the even years the FI is in Germany, in the uneven years in France.

## What is the most interesting channel for you?

Spice importers seem to be the best partner for placing curcuma longa on the European market. This is specifically relevant for new suppliers as supplying the retail segment directly is very demanding and requires a lot of quality and logistical investments.

However, for the well-equipped and price competitive producers, packing for private labels can be an option. Until now, importers often do private label packing for European supermarkets. As the cost of the workforce in Europe is increasing, importers of curcuma longa sometimes search for opportunities to pack in supplying countries if they can assure full traceability and quality control.

As an exporter, you can use several channels to bring your spices or herbs on the European market. However, you should realise that if you are unable to supply at least one container within your buyer's (short) time frame, it is unlikely that you will successfully manage to supply to the European market. If you are unable to do so, you can work together with other suppliers interested in supplying to the European market.

### Tips:

See our [Tips for finding buyers](#) on the European market for spices and herbs.

Benefit from the experience and knowledge of specialised European importers and agents instead of approaching manufacturers directly.

To help you enter the market, consider working with an agent or representative with a good reputation. You can look for commercial agents on the website of [Internationally United Commercial Agents and Brokers \(IUCAB\)](#).

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

## 3. What competition do you face on the European curcuma longa market?

### Which countries are you competing with?

Other producing countries include Pakistan, China, Haiti, Jamaica, Taiwan, Myanmar, Indonesia, Ethiopia and Indonesia.

### India is the home of curcuma

India is the main supplier of Curcuma longa to the European market. In 2018, this country accounted for 90% (16.8 thousand tonnes) of supplies from developing countries to Europe.

There are several provinces in India where production of curcuma longa takes place. Among the top 5 production provinces are Andhra Pradesh, Telangana, Maharashtra, Tamil Nadu, and Kamataka, although different sources might mention other lists. While India's stake in European imports is already so large that it was not shown in Figure 3 for reasons of scale, India's position as the #1 producer worldwide becomes even more obvious from the fact that only less than 10% of production output is exported. The lion share is consumed domestically.

Roughly, India accounts for 80% of global curcuma longa production. India's share of global exports is somewhat lower (about 60%), as India has a huge domestic market for curcuma longa. Also, India's share in world trade is declining slightly because other countries have become curcuma longa exporters as well. Still, the impact is low and only has led to a few % lower share for India in world trade.

India's curcuma is promoted as curcuma with the highest curcumin content worldwide (which can be up to 8%). Note that India also imports curcuma from other production countries, mostly from Indonesia, Vietnam, Ethiopia, Myanmar and smaller but still substantial volumes from Nigeria.

Production and export of spices, including curcuma longa, is monitored and supported by [Spice Board of India](#). The Spice Board of India is one of the most famous spice industry organisations in the world. The Board organises the [World Spice Congress](#) every second year, and also is responsible for the mandatory testing of spices before export to the EU.

## Superfood curcuma from Peru

Peru is the second supplier with 5% share of European imports. Peruvian curcuma production has grown quickly in the past decade, from less than 400 tonnes in 2014 to almost 1,000 tonnes in 2017 and 2018. The lion's share of production is exported.

Exports are strongly promoted and supported by the national export promotion organisation, [PromPeru](#). PromPeru has created a national brand, 'Superfood from Peru', that is promoted on all leading international trade fairs, and curcuma is one of these superfoods.

## Madagascar

Madagascar is a small producer of curcuma longa of relatively good quality, which is reflected by a very high curcumin content (7.5%). It is grown on the coastal 'Centre Est' strip of the Big Island, especially in the Beforna region. This area is known for its rhizome crops to which ginger and curcuma longa also belong.

Exports and production have grown considerably in the past decade. Virtually all exports go to France and Germany and reached about 400 tonnes in 2017 and 2018. Exporters export both powder and slices and also offer organic Curcuma (certified by Ecocert). Most exported products are packed in 25kg bags.

## Thailand

Thai exports of curcuma longa have grown sharply in the period under review. While the export volume in 2014 was only 40 tons, in 2018 this volume had grown to 160 tons. More than 50% goes to the United States, and further the destinations are quite diversified. Only 38 tons went to Europe and predominantly to the Netherlands (24 tonnes) and Germany (11 tons). Thailand predominantly exports fresh curcuma, which can be also seen from import prices; for example, in the Netherlands the 24 tonnes had an average import value of USD 4.5 per kg.

## Costa Rica

Costa Rica's exports of curcuma longa remained between 20-30 tons per year until 2016, but jumped to 150 tonnes in 2017 and 170 tons in 2018. More than 90% of the exports go to the Netherlands. Costa Rica mainly exports fresh and organic certified curcuma to the Netherlands and to the [organic fresh produce importer BioTropic](#).

While it seems that production of curcuma longa in Costa Rica is relatively new, the production and export of ginger is already playing an important role since 2000. However, several bad harvests have resulted in a declining production.

## Vietnam

Since 2017, Vietnam is exporting more than 100 tonnes per year to Europe. This is still a small amount, certainly when taken into account the fact that Vietnamese exports of curcuma longa reached between 1.2 and 2.6 thousand tonnes per year in the 2014-2017 period. In 2018, the export volume took off with a volume of 16 thousand tonnes. Most of the exports are fresh produce exports to India used by Indian processors to make curcuma powder.

## Market entry barriers

There is a strong and growing demand for curcuma longa in Europe. But competition is fierce, especially from suppliers from India. Therefore, scale of production and processing is important to enter the market.

If you are a small farmer of raw materials you need to engage with curcuma longa processors at a relatively close distance to be able to ensure product quality. Vertically integrated companies can combine cultivation, processing and marketing. For example, the Indian company [Sabinsa](#) is involved in research, manufacturing and standardising extracts, as well as marketing and export. Integrated companies also operate on a larger scale and work with outgrowers and/or have plantations to grow the product.

### Tips:

Conduct a thorough feasibility study before engaging in curcuma longa cultivation and in particular in further processing. Look into your returns on investment and your financial and human resource capacities to produce according to international buyer requirements.

If you can only cultivate on a small scale, engage with local processors to sell your rhizomes or cooperate with other growers to share the costs of investment in processing equipment.

## Which companies are you competing with?

### Companies from India

India is Europe's main supplier of curcuma longa by a long way. Companies from this country will be your main competitors with regard to the raw material. They can offer products at a low price, but at the same time, there are concerns among buyers regarding quality and quality consistency, including adulteration.

There are many companies in India that export spices. Curcuma is in the top 5 of spices produced in India, so virtually all Indian spice exporters also export curcuma. A few exporters are owned by foreign companies, such as [Sabinsa](#) (headquartered in the USA).

Still, most companies are small or medium-sized local companies, such as: [DeepKamalExports](#), [Herbocyte](#), [PMRC corporation](#), [Grover Sons](#), and [Aaditya Turmeric Trading Company](#).

Competition among the many companies is considerable, which gives buyers a clear advantage when it comes to price negotiation.

### Companies from Peru

Peruvian exporters of curcuma mostly export a range of agricultural products. In the first place, often they export both curcuma and ginger, the two leading spices produced in Peru. Other products that might be part of the range are cacao, dried berries, etc.

Some examples of such Peruvian exporters are: [Agro-Expo-Llacta SAC](#), [SupraCorp SAC](#) and [Fito Export](#).

The largest exporter from Peru is probably [La Campina](#), which is a farmer's cooperative of organic-certified farmers. La Campina is a young company, with a strong promotion which can be also seen from its attractive website.

## Companies from Madagascar

Exporters from Madagascar typically export a wide range of natural produce, such as essential oils, oleoresins and spices. In addition to the famous vanilla beans from Madagascar, they also export cinnamon, ginger, cloves, and pepper. One example is [Phael Flor Export](#).

[Jacarandas](#) is another well-known large exporter from Madagascar. This company is an exporter of spices and essential oils, and also based in France. The markets of Germany and France are the two leading essential oils markets in Europe and focus markets for Jacarandas (also for their spices).

## Companies from Vietnam

Vietnamese companies typically export a range of natural produce, ranging from spices, and dried fruits to nuts. Some examples are [VN Spice](#) and [Visimex](#).

### To differentiate from competitors you can implement these tips:

- Are you producing curcuma longa rhizomes with a high curcumin content (over 3%)? Stress this in your product documentation. This can be a competitive advantage for you over other curcuma longa producers.
- Ensure proper harvest, post-harvest and processing and proper documentation if you want to exploit opportunities to add value to your product. Carry out improvements on quality according to your buyer's requirements (specifications) and explore what they are willing to pay for.
- Have a look at the website of [FoodNavigator](#) to learn more about food health trends and other developments in the food sector.
- Ensure traceability of your product and be open about the quality and quantity you can deliver, and at what price.
- Always verify whether your European buyers are interested in certified ingredients. If they are not interested, you can still help manufacturers build their case by documenting and visualising your product and company's unique value proposition. Final manufacturers with a company image focused on ethical or environmental aspects can use this to market the end product in Europe

### What are substitute products for curcuma longa?

Mostly, curcuma longa's most important function is as a colorant. If curcuma longa is left out of a dish, it doesn't really influence the taste significantly, but mostly the colour. There is not a substitute for curcuma longa as a colorant used on industrial scale, as it is natural and very efficient in use. But, if people at home are out of curcuma longa and want to colour a dish, they can use saffron threads or madras curry powder (which has curcuma longa as ingredient). Saffron threads have a similar colour and flavour, but are rather expensive. Madras curry powder, instead, is much cheaper but will also add more taste to the dish, as it is a mix of different spices. Another substitute for curcuma as a colourant is mustard powder.

#### Tips:

Build a marketing story for your curcuma longa products. Show how they are different from competing products. You can focus on the content of curcumin in your roots or how curcuma longa is traditionally used to support health.

See also our [tips for doing business with European buyers](#) for natural ingredients for health products.

## 4. What are the prices for curcuma longa?

Prices for curcuma longa strongly depend on the type of product being sold (dried roots/powder or extract) and its curcumin content.

[ITC Market Insider](#) has recently reported prices of USD 0.97 (€0,87) and USD 1.03 per kilogram for Indian Curcuma longa spice (food-grade powder) on the European market (August and July 2019, respectively).

Prices from other supplying countries can be considerably higher. For example, FOB prices of curcuma from Peru were between USD 2.1-2.9 per kg in the years 2017 and 2018.

Monitor harvests in major production countries, particularly in India. This will help you to anticipate price developments for your curcuma longa. You can request such information from European importers or check the [Spices Board India](#) website.

The price of curcuma longa that consumers buy in the supermarket consists of:

- Raw materials: 5-15%.
- Processing: 5-15%
- Transport costs: 2-5%
- Import and processing in Europe: 15-30%
- Retail margin: 30-60%

A few examples of curcuma available across Europe are the following:

- [Organic curcuma powder from Bulk Powders](#) (available in many European countries) in a stand-up pouch of 1kg, €19.99.
- [Organic curcuma in different packaging sizes](#) between 500 grams – 25 kg. Price range of €5-16 per kg. Available in the Netherlands through NaturalSpices.
- [Biotona Curcuma raw powder, organic in a stand-up pouch](#). Available through Holland&Barrett in UK, and the Netherlands. Price in the Netherlands is €10.79 for 200 grams (equal to €54 per kg).
- [Ostmann ground turmeric, 35 grams in a spice pot](#). Available through German retailer Edeka. Price per pot €1.99 (€56.90 per kg).


### Tip:


See [ITC's Market Insider on Spices](#) for more information on prices of dried rhizomes/powder of Curcuma longa. You need to register for up-to-date information.


This study has been carried out on behalf of CBI by [Autentika Global](#).

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