

The European market potential for turmeric

The European market is promising for turmeric suppliers from developing countries. Turmeric has many health benefits that meet the needs of European consumers. European buyers are already familiar with turmeric and its applications in the health product industry, which creates an opportunity for suppliers of turmeric from developing countries.

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1. Product description

Turmeric (*Curcuma longa*) is a subspecies of the *Curcuma* genus from the family of *Zingiberaceae*. There are about 100 species that belong to the *Curcuma* genus. *Curcuma longa* is the most popular one; other *Curcuma* species include *Curcuma amada* (mango ginger), *Curcuma kwangsiensis*, *Curcuma zedoaria* (zedoary) and *Curcuma aromatica* (wild turmeric).

The active substance of turmeric (*Curcuma longa*), curcumin, has multiple therapeutic properties such as anti-inflammatory, antioxidant and cancer prevention. The largest turmeric producers are India, China, Indonesia, Bangladesh, Myanmar and Vietnam. India is the world's largest producer and exporter.

Turmeric has been used in traditional medicine for various conditions in India, Bangladesh and Pakistan. Turmeric is used in Ayurvedic and Unani medicine to treat conditions such as inflammation, ulcers, diabetes, diarrhoea, liver disease as well as various skin conditions including insect bites, chickenpox and itching. Many of its traditional uses are supported by scientific evidence.

Turmeric is not yet widely used in Western medicine. Its active ingredient, curcumin, is used to treat or relieve symptoms of cancer, dementia and irritable bowel syndrome. Turmeric is also shown to have anti-inflammatory, anti-fungal and antioxidant properties. In addition, turmeric is used as a spice as well as a colourant in foods, cosmetics and textiles. This report examines the application of turmeric in the health product industry.

There are usually two grades of turmeric on the European market. Food-grade turmeric is sold as a spice in retail. Pharmaceutical-grade turmeric is sold in the form of supplements. Food-grade turmeric is more common in Europe because of the high demand from the retail and food sectors.

Turmeric is traded under HS code 0910300000. The CAS Registry Number of turmeric is 458-37-7.

Tips:

See the [European Union herbal monograph on turmeric](#) for more information on its properties and applications.

Look for credible literature sources on the benefits of turmeric. Use these references in your product documentation and marketing materials. You can find various scientific studies on platforms such as [sciencedirect.com](https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2799031/), [NCBI](https://www.ncbi.nlm.nih.gov/) or [Google Scholar](https://scholar.google.com/).

2. What makes Europe an interesting market for turmeric?

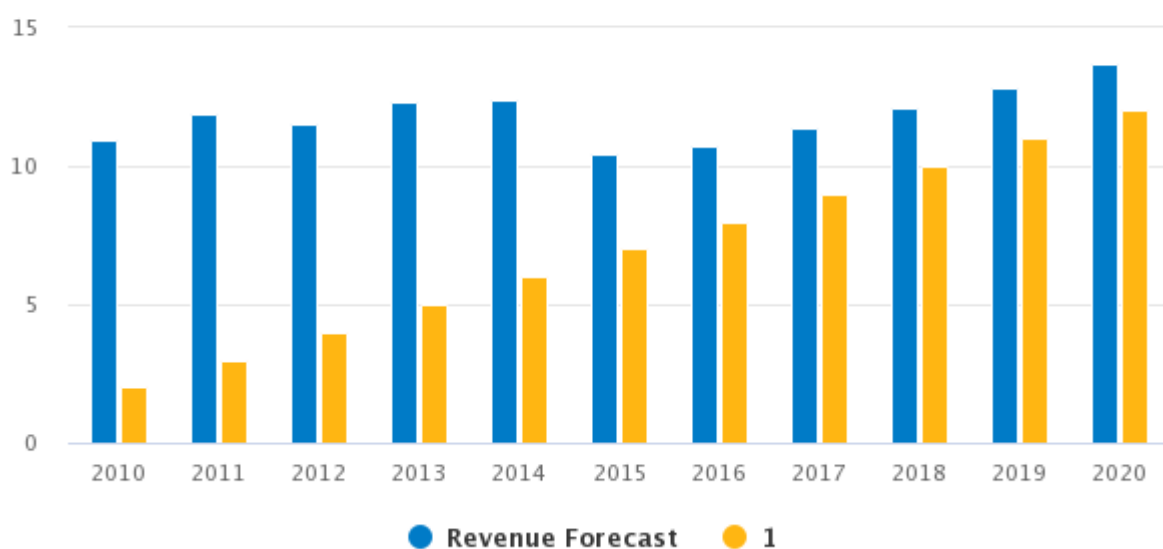
Turmeric is used in the pharmaceutical, nutraceutical and homeopathic industry. However, the majority of turmeric is used by the food industry. Turmeric is increasingly used in the natural health product industry, because it provides several benefits (highlighted in the previous section).

There is a growing demand for nutritional supplements and vitamins in Europe. This trend is driven by rising consumer awareness. Consumers are looking for new ways to improve their health and immune system. The ageing population and the rise in chronic diseases within Europe are raising interest in preventive health care.

Turmeric is gaining popularity on the European market. It is used in nutritional supplements because of its numerous beneficial properties. Turmeric is also used in some other types of complementary and alternative medicine.

Figure 1: The European Vitamin and Supplements Market in Europe 2010–2020

in € billion



Source: Statista

Figure 1 shows that the European market for vitamins and supplements increased over the last decade. It is expected that this trend will continue in the foreseeable future. The market is driven by growing health-consciousness among consumers.

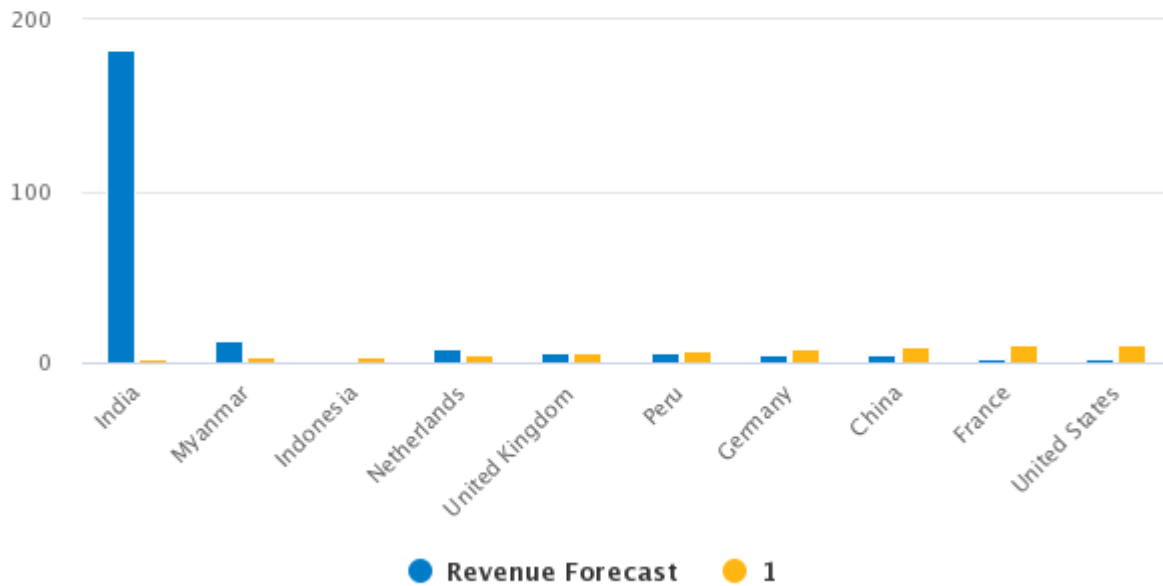
The popularity of complementary and alternative medicine (CAM) is also rising in Europe. Turmeric is commonly used to treat health problems in Europe. The more affluent patients are likely to use CAM procedures as a complementary treatment to conventional medicine.

The popularity of turmeric increased in the last few years. In 2016, [Mintel named turmeric a superfood to watch](#). This fact is due to its anti-inflammatory and immune-boosting properties. A number of new products containing turmeric have been launched. In March 2019, [Naturex launched its Turmipure Gold supplement](#). It is marketed as the first bioequivalent turmeric at a relatively low dose. More innovation is expected in future.

India is the leading supplier of turmeric in the world. It is estimated that it supplies around 20,000 tonnes of turmeric each year. Chart 2 shows the largest exporting countries of turmeric.

Figure 2 : Leading Turmeric Exporters 2017

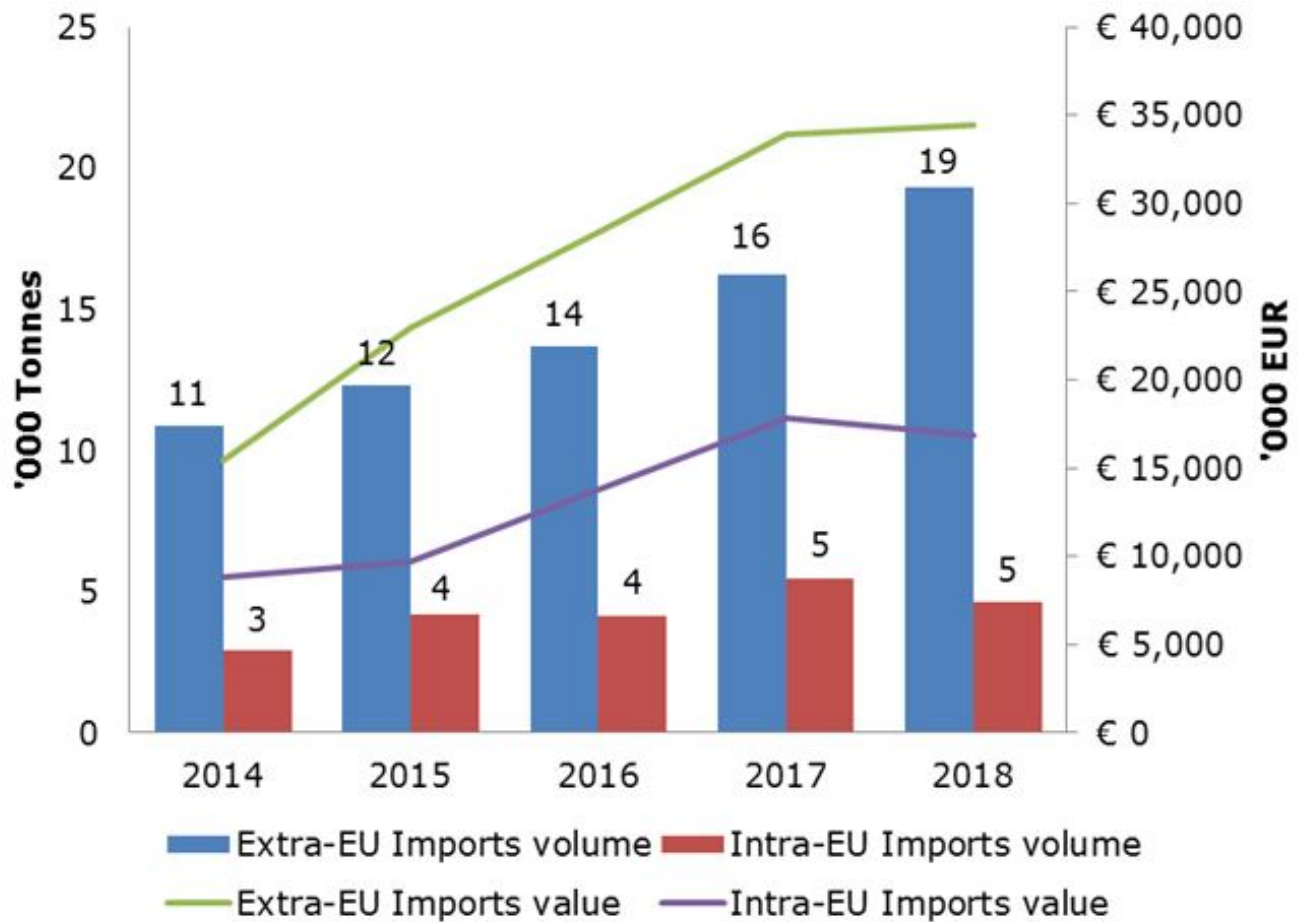
in \$ million



Source: Statista

The share of imports of turmeric from outside of the EU reached 80% in 2018. India is the main exporting country to Europe. It is expected that India will keep its leading position in the foreseeable future. The supply of turmeric is likely to be vulnerable to volatile weather conditions in India.

Figure 3: Imports of turmeric to the EU, 2014-2018, in 1,000 tonnes and in € 1,000



European imports of turmeric increased in value as well as volume between 2014 and 2018. The volume of turmeric imported to Europe reached 24,000 tonnes in 2018, an increase of more than 70% from 2011. Over the same period, the value of turmeric imports to Europe increased by 112%.

The demand for turmeric in Europe is likely to continue to grow in future. The market for nutritional supplements is growing in most European countries because of the growing number of health-conscious consumers in Europe.

The ageing population in Europe also stimulates the demand for turmeric. Many of its properties alleviate some symptoms of chronic diseases and help treat medical conditions such as dementia. European consumers are looking for more natural ways to improve their health. Turmeric offers a solution, as it is already well established on the European nutraceutical market and consumers are familiar with its beneficial properties.

Tips:
Communicate with European buyers and see what grade of turmeric they require.
Visit trade fairs across Europe when looking for European buyers. Examples include [Health Ingredients Europe](#).

3. Which European countries offer the most opportunities for turmeric?

The most attractive European countries for turmeric are the UK, Germany, the Netherlands, France, Spain and Poland. These countries are the leading importers of turmeric to Europe. The imports to these countries have been steadily increasing. It is expected that this trend will continue.

Table 1 gives the leading importing markets for turmeric in Europe. It shows the rise in imports between 2011 and 2018.

Table 1 Leading importers of turmeric to Europe, 2018

2018	Import Volumes in '000 tonnes	5-yr volume growth	Value of Imports in m EUR	5-yr value growth	Exporters from Outside of EU in Value	Important Market Players
UK	7.2	91%	11.89	123%	India (96%)	Pukka Herbs and Supplement Factory

Germany	4.5	74%	10.42	135%	India (81%)	Dr. Behr GmbH, Bio Import Europa
Netherlands	3.8	63%	7.08	130%	India (76.7%), Peru (19.3%)	Tradin Organic, Forward Farma BV
France	2.1	46%	5.65	40%	India (85.6%)	Nexira, Curcumaxx
Spain	1.5	106%	3.47	163%	India (88.6%)	Productos La Constancia S.L.
Poland	1.0	53%	2.06	123%	India (92.9%)	GROTEX, AGREMA POLAND SP. Z O.O.

Source: Eurostat

UK

The UK is the leading importer of turmeric in Europe. Between 2014 and 2018, British imports of turmeric increased in value and volume. The volume of turmeric imported to the UK reached 7,200 tonnes in 2018, a 91% increase from 2014. Over the same period, the value of turmeric imports increased by 123%. The volume of imports from outside of the EU has more than 90% of the share and this figure is growing. India is the leading exporter.

The UK has a growing homeopathy industry. According to the [Homeopathy Research Institute](#), it is estimated that the market grows at about 20% a year. Around 10% of the population in the UK uses homeopathy. The UK also has a growing supplement market, which was valued at GBP 421 million in 2016.

The UK has a very attractive market for turmeric for health products, as it is one of the largest consumer markets in Europe. Some of the leading suppliers of turmeric supplements are [Pukka Herbs](#) and [Global Product](#). There are also a few supplement contract manufacturers in the UK; the [Supplement Factory](#) is one such company. The leading importer of turmeric is [Natco Foods](#).

It is expected that the UK will remain an important market for turmeric in the foreseeable future. However, Brexit may disrupt the international supply chains. Especially in case of a no-deal scenario, it may take some time to renegotiate trade deals with developing countries.

Germany

Germany is the second-largest importer of turmeric in Europe. German imports of turmeric increased in value as well as volume between 2011 and 2018. Between 2014 and 2018, the value of turmeric imports to Germany

increased by 135%. Over the same period, the volume of imports increased by 74%.

The [German homeopathy market](#) was valued at EUR 608 million in 2017. However, the market decreased by 0.3% that year because of the recent public debate on the effectiveness of homeopathic medicine in Germany. The [German supplement market](#) was valued at EUR 1.4 billion in 2018, an increase of almost 10%.

Germany has the largest consumer market in Europe. German consumers have a high level of health-consciousness. Important suppliers of turmeric supplements are Govinda, Nu3 and Nature Love. German importers and traders that source turmeric include Dr. Behr GmbH and Bio Import Europa.

Germany is expected to remain an important market for turmeric. It is expected that the demand for health products and supplements will continue to rise in future. The demand for organic products is also increasing in Germany. Suppliers of turmeric in developing countries should target German buyers.

The Netherlands

Dutch imports of turmeric increased in value as well as volume between 2014 and 2018. Dutch imports of turmeric reached 3,800 tonnes in 2018, a 63% increase from 2014. Over the same period, the value of turmeric imports increased by 130%. Around 97% of turmeric is imported from outside of the EU; the major exporters are India and Peru.

The Netherlands offers an opportunity for turmeric exporters from developing countries, as it is an entry point for ingredients into Europe. [Tradin Organic](#) is a leading importer of organic turmeric. Supplements manufacturers that use turmeric include [Forward Farma](#) and Vitabay.

Suppliers of turmeric should target Dutch buyers, as they tend to re-export ingredients to other European countries. It is expected that the demand for turmeric from the Netherlands will continue to rise, as the popularity of turmeric supplements is increasing in Europe.

France

French imports of turmeric increased in value as well as volume between 2014 and 2018. Between 2014 and 2018, the value of turmeric imports to France increased by 40%. Over the same period, there was a 46% rise in the volume of turmeric imported to France.

The French homeopathy market was worth EUR 620 million in 2016. According to a study conducted by Ipsos, 56% of the French population uses homeopathic medicine. The French supplement market was worth EUR 1.9 billion in 2018.

France has one of the largest consumer markets in Europe. It is also an important trader of raw materials to Europe. Nexira and Jacarandas are significant importers of turmeric. A leading French manufacturer of turmeric health products is Curcumaxx.

It is expected that the demand for turmeric will continue to rise in the near future. Rising health-consciousness and the demand for high-quality natural products are expected to generate a demand for turmeric in France.

Spain

Spanish imports of turmeric between 2014 and 2018 increased in value as well as volume at a triple-digit rate. In 2018, Spanish imports of turmeric reached 1,500 tonnes, an increase of 106% from 2014. Over the same period, the value of Spanish imports of turmeric increased by 163%. The main exporter is India; the share of extra-EU imports is more than 80%.

The main producer of turmeric supplements is Solgar. Importers include Productos La Constancia S.L.

The demand for turmeric in Spain rapidly increased in the last couple of years. It is expected that this increase will continue in the coming years.

Poland

Polish imports of turmeric increased in value as well as volume between 2014 and 2018. In terms of value, turmeric imports increased by 123% over this period. In terms of volume, the level of imports increased by 53% between 2014 and 2018.

Poland has the largest consumer market in Eastern Europe. Some of the leading producers of turmeric supplements include Alter Medica, Bio Medical Pharma and Medverita. Important Polish traders are Grotex and Agrema Poland. Poland has a robust manufacturing sector. Leading contract manufacturers include Tifarm, BioCorpo, DDB and Tantus.

The demand for turmeric is expected to continue to rise in Poland. The main drivers are rising consumer awareness and a demand for natural products.

The most attractive country markets for suppliers of turmeric from developing countries are Western European countries. Poland is an exception, because it has a large supplement market. Western European countries have the largest consumer markets. Some of the largest producers of supplements and pharmaceuticals are also present in Western European countries.

Tips:

Target Western European countries when exporting turmeric. These countries have the most opportunities for exporters of turmeric from developing countries.

Look for online platforms where you can advertise your turmeric. Many small buyers order turmeric in bulk according to their needs. Examples include [Alibaba](#) and [Go4WorldBusiness](#).

Make sure that your turmeric is certified when considering markets such as Germany, France and the UK. There is a growing demand for organic products on these markets.

4. Which trends offer opportunities on the European market?

The increasing demand for turmeric in Europe puts pressure on suppliers of turmeric from developing countries. There is a growing popularity of organic products in Europe and consumers demand high-quality ingredients. Climate change and unstable weather conditions also threaten the supply of turmeric to Europe, which pushes up the prices.

Increasing demand for organic turmeric

There is a growing demand for organic turmeric on the European market. This trend is driven by rising consumer awareness and a willingness to pay for high-quality products. The demand for organic foods and plant-based supplements is rising.

Organic certification is often associated with traceability and sustainability. Organic turmeric involves production according to high standards and lower risks of adulteration. Organic certification is seen as a quality standard by European buyers and it gives an additional premium to producers.

Although organic supplements are considered a niche area, the demand is rising. Organic turmeric is also used by organic food companies; the growing use of organic turmeric is likely to rise in future. Suppliers of turmeric

should consider the opportunities provided by Organic certification.

For example, [Evergreen Exports](#) is a supplier of organic turmeric from India.

Tips:

Consider Organic certification for your ingredients. This certification can help you cater to consumers who are looking for high-quality products. Exporters of organic turmeric need to meet the [EU organic standard](#).

Clearly communicate to buyers that your ingredients are certified and be prepared to provide evidence.

If your turmeric is not certified, be transparent and communicate other aspects of the production process which are sustainable. Use this information on your promotional materials.

Turmeric production threatened by climate change

Climate change is affecting the production of many agricultural crops, including turmeric. In India, the planting season of turmeric usually starts in May. However, changing rain patterns sometimes delay planting until August. Droughts also affect the soil quality and the amount of water in the storage systems.

These changes have an adverse effect on the growth of the turmeric plant and its yields. This situation puts pressure on producers and can lead to rising turmeric prices on the international market.

Flooding also presents risks to the turmeric supply. In 2019, some of the major turmeric-producing parts of India were hit by floods. It is estimated that around 5,000 tonnes of crop were lost.

Tip:

Consider sustainable production of turmeric, which makes crops more resilient against droughts and extreme weather conditions.

Innovation in the turmeric sector

The demand for high-quality products and ingredients on the European market is leading to innovation involving turmeric. Ingredient companies are constantly looking for ways to increase the efficacy of ingredients and products. As a result, the applications of turmeric and turmeric-derived ingredients are increasing.

In March 2019, [Naturex launched its Turmipure Gold supplement](#). One of the major advantages of this ingredient is its high rate of bioavailability. According to a scientific study, 300 mg of Turmipure Gold can deliver more curcuminoids than 1500 mg of standard turmeric.

In 2018, the German company [Bionorica SE](#) signed an agreement with the Thai government to produce a turmeric-based medicine called Antiox. The Indian company [Arjuna Natural](#) also markets bioavailable turmeric extract under the Curcugreen name on the European market.

More innovation is expected in future. Turmeric has gained popularity among European consumers, while


buyers and manufacturers are familiar with its beneficial properties. Ingredient companies are likely to capitalise on its popularity and develop turmeric-derived ingredients with higher efficacy.

Suppliers of turmeric from developing countries should make note of innovations involving turmeric. When approaching buyers, exporters should communicate the versatility and efficacy of turmeric as well as turmeric-derived ingredients.


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

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