

What is the demand for cocoa on the European market?

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Europe is a very diverse and therefore interesting market for cocoa. Its chocolate processing and manufacturing industry is strong, requiring high volumes of cocoa beans. The industry processes large amounts of bulk cocoa, but demand for specialty cocoa is growing strongly. Sustainability is an important subject for the European cocoa industry and for chocolate consumers.

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1. What makes Europe an interesting market for cocoa?

Europe is the world's largest chocolate manufacturer and export market. The European cocoa market is very diverse, as European buyers source cocoa beans of different qualities and origins to cater to the demand of the cocoa and chocolate industry. As such, Europe offers opportunities for suppliers of both bulk and specialty cocoa.

The countries with the highest per-capita chocolate consumption are in Europe

The world's average chocolate consumption amounts to an estimated [0.9 kilogrammes per capita per year](#). European countries show significantly higher averages. The largest chocolate consumers in the world are the Germans with a per capita consumption of [11 kilogrammes](#) per year. Switzerland is ranked as the second-largest with 9.7 kilogrammes per capita, followed by Estonia with 8.8 kilogrammes. The average per capita chocolate consumption in Europe is estimated at 5.0 kilogrammes.

The European chocolate market was valued at [€46 billion](#) in 2020. It is expected to grow at an average annual rate of around 2.2% between 2021 and 2026. Although the COVID-19 pandemic has disrupted the cocoa value chain and global sales volumes as of early 2020, a gradual recovery from COVID-19 is expected. For example, the sales volumes from the world's largest cocoa and chocolate company Barry Callebaut registered an increase of [3.4%](#) between September 2020 and May 2021, after a sharp decline since the pandemic started in early 2020.

Sales of specialty chocolates suffered the most during the COVID-19 pandemic; they were halted for months in Europe due to [the closing of specialised stores and other sales channels](#). Although the pandemic brought a focus on sales of commercial chocolate qualities via supermarkets, European consumers are still increasingly seeking higher quality and higher cocoa content in their chocolate. As such, the long-term market prospects in Europe still offer good opportunities for exporters in producing countries.

Europe is the world's largest chocolate producer and exporter

Europe houses many chocolate manufacturers of all sizes, which work with different cocoa qualities. Globally,

seven multinational companies represent the bulk of the market for final chocolate products: [Nestlé](#), [Mondelēz](#), [Mars](#), [Hershey](#), [Lindt & Sprüngli](#) and [Ferrero](#). Besides Hershey (United States), all multinationals have chocolate confectionery production plants in Europe.

According to [Prodcom data](#), the European Union and the United Kingdom together produced an estimated 3.9 million tonnes of final chocolate products in 2019, not including industrial chocolate. Note that the actual production volumes were higher in 2019, as for some products data at country level are confidential. Germany is the leading producer of chocolate as a consumer product, followed by Italy and France.

Regarding industrial chocolate, Europe is also the largest producing region, with a market share of about **40%**. Industrial chocolate, such as chocolate couverture, is sold as an intermediary product to food manufacturers of all sizes in the mainstream and gourmet food segments. The global industrial chocolate market is expected to reach **9.5 million tonnes** in 2024. [Barry Callebaut](#) is the world's largest player in the industrial chocolate market, with over 60 factories worldwide and a product sales volume of **2.1 million tonnes** in 2019/20. Other large players in the industrial chocolate market are [Cargill](#), [Fuji Oil](#), [Puratos](#) and [Cémoi](#).

Europe is also the world's largest chocolate exporter, accounting for more than **76%** of global chocolate sales in 2020. Germany is the world's largest exporter of chocolate, with a global market share of 17%, followed by Belgium with 11%, Italy with 7.3%, Poland with 7.3% and the Netherlands with 6.4%. Poland, France and Austria were among the fastest-growing chocolate exporters between 2019 and 2020, with growth rates of 13%, 6.8% and 6.6% respectively.

Europe has world's highest industrial demand for cocoa beans

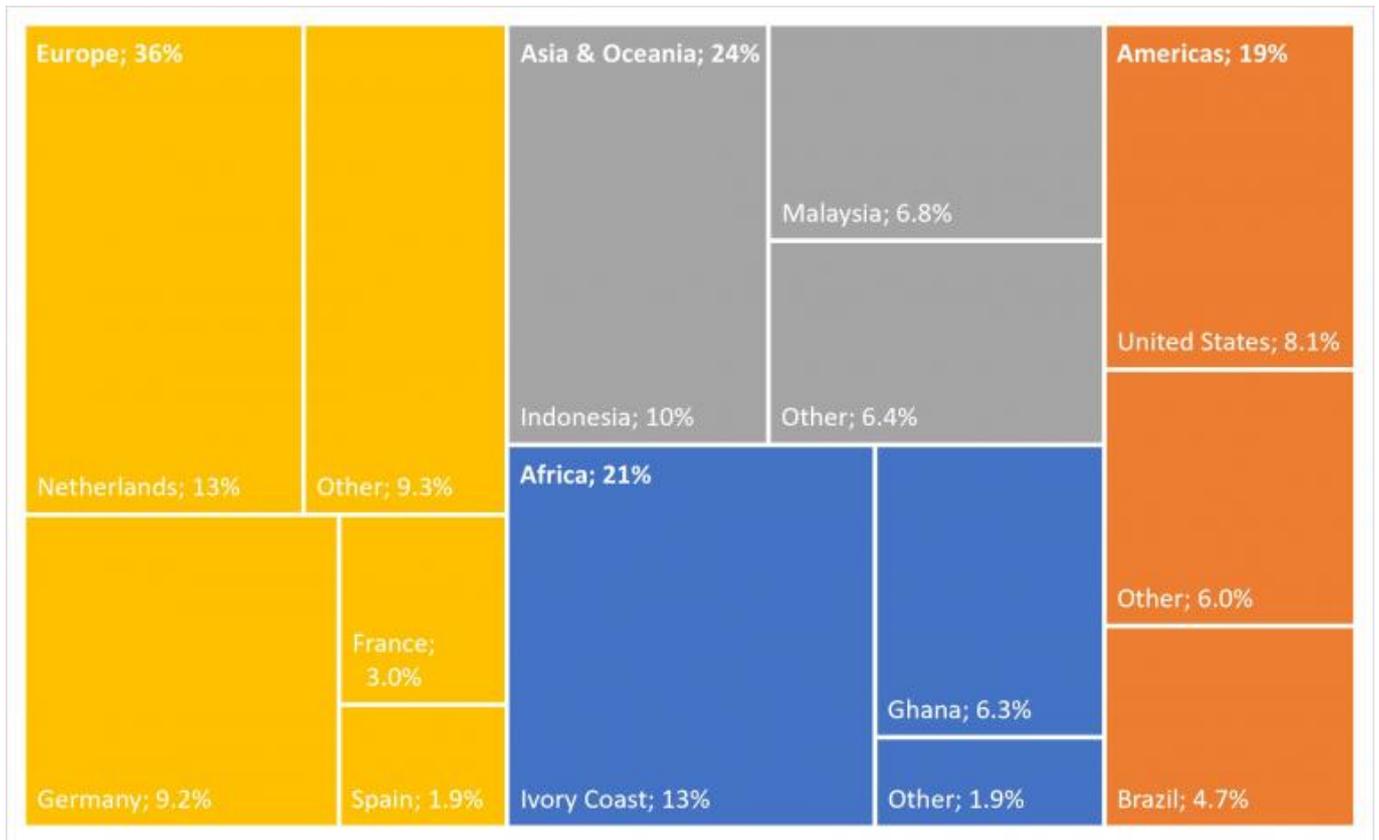
Cocoa bean grindings serve as a good indication for market demand. Given Europe's important role in chocolate manufacturing, exports and consumption, the demand for cocoa beans is high in Europe. Globally, cocoa bean grinding activities amounted to an estimated **4,671 thousand tonnes** in cocoa year 2019/20, registering a decline of 2.4% compared to 2018/19. This decline is the result of the impact of the global pandemic. However, forecasts indicate recovery with a growth perspective of 3.0% between 2019/20 and 2020/21, amounting to global cocoa grindings at 4,809 thousand tonnes. In 2019/20, Ivory Coast was the world's largest cocoa bean grinder with 614 thousand tonnes, followed by the Netherlands with a cocoa grinding volume of 600 thousand tonnes.

As a region, Europe accounts for the largest share of cocoa grinding activities in the world, with **36%** of global grindings in 2019/20. Total European grinding activities consumed an estimated 1,696 thousand tonnes of cocoa beans. European grindings registered a decline of 1.3% compared with the year before. The decrease in [cocoa grinding is the result of the COVID-19 pandemic](#). However, [European grindings picked up growth again in the second quarter of 2021](#), showing signs of recovery.

Regardless of the effects of the global pandemic, the share of European grindings is expected to decline in the future, as there is an increase of cocoa grinding in producing countries. In 2019/20, cocoa grinding at origin accounted for around **46%** of all grinding activities worldwide. For comparison, in 2015/2016, the share of grinding at origin was 43%. Grinding at origin has been used as a strategy by large multinationals such as Cargill, Olam and Barry Callebaut to lower production costs as well as to target regional markets. To reinforce this, these multinationals have invested in their production facilities at origin, for instance in this example of [Barry Callebaut](#).

Ivory Coast was the world's largest cocoa grinder in 2019/20 and is expected to further consolidate this position. For instance, in December 2019, [Cargill invested US\\$100 million in its processing site](#) in the country to increase production capacity. In Ivory Coast, the growth in grinding activities is aimed at [increasing the value of exports and protecting the economy from fluctuations of the global cocoa market](#).

Table 1: Estimated cocoa bean grinding by region and country in % of the world's total, 2019/20



Source: ProFound, based on data from International Cocoa Organization (ICCO), 2021

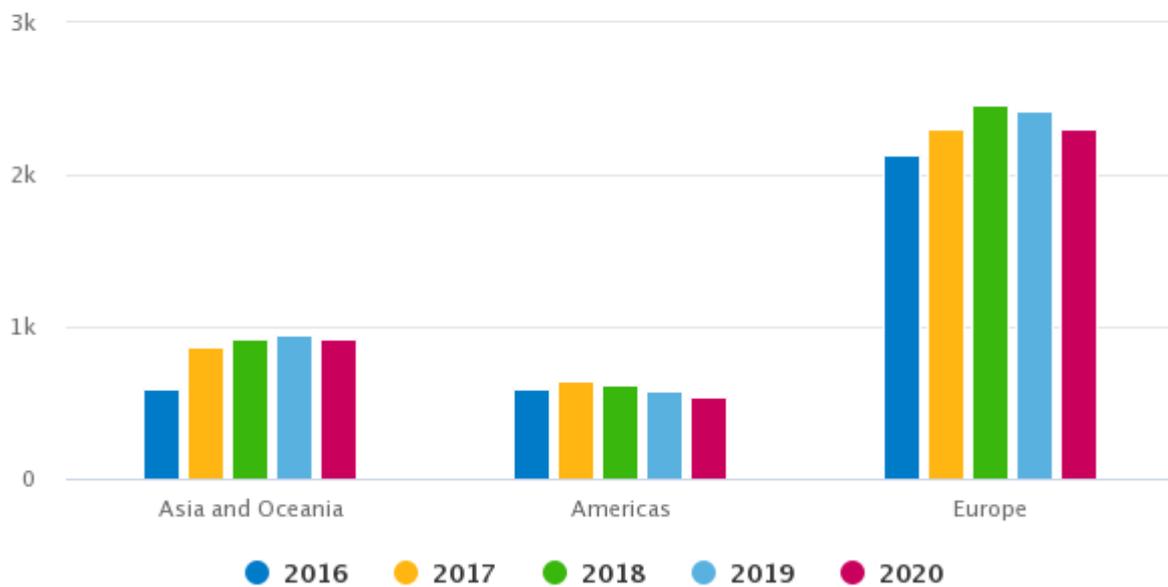
Europe is the main global destination for cocoa bean exporters

Europe is the largest importer of cocoa beans worldwide, with 61% of global imports. To compare, North America and Latin America together imported about 14% of global cocoa bean imports, and Asia 25%.

Total imports of cocoa beans (HS code 1801) by Europe amounted to an estimated 2.3 million tonnes in 2020. Between 2016 and 2020, the import volume increased by an average 2.0% per year. Of total European cocoa bean imports, about 79% of cocoa beans were sourced directly from producing countries in 2020, amounting to 1.8 million tonnes. European imports directly sourced from cocoa-producing countries increased at a year-to-year rate of 1.4% between 2016 and 2020.

Figure 1: Global imports of cocoa beans per region

in 1,000 tonnes



Source: Eurostat and International Trade Centre, 2021

Europe is an interesting outlet for both bulk and speciality cocoa

West Africa is Europe's main cocoa bean supplier. Imports from this region mainly consist of bulk cocoa of the *Forastero* variety. The main supplying countries are Ivory Coast with 931 thousand tonnes in 2020, Ghana with 255 thousand tonnes, Cameroon with 222 thousand tonnes and Nigeria with 148 thousand tonnes. Cocoa supplies from these countries are essential to produce standard-quality chocolates and are used by most large companies worldwide.

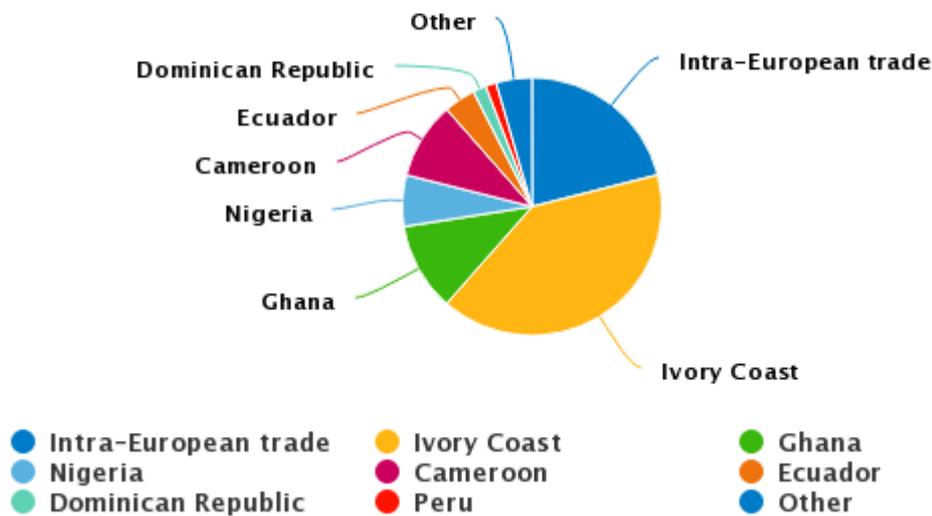
Between 2016 and 2020, supplies from Ivory Coast and Cameroon increased at an average annual rate of 6.0% and 13% respectively. Over the same period, supplies from Ghana and Nigeria decreased at an average annual rate of 8.4% and 5.4% respectively. Primarily due to the COVID-19 crisis, the largest European cocoa bean importer, [the Netherlands](#), imported lower volumes of cocoa beans from West Africa in 2020.

Specialty cocoa, including fine flavour cocoa, is mainly sourced from Latin America and the Caribbean. Latin American suppliers only accounted for a small share of total imports, with 7.4% of total European imports in 2020. The overall imports from Latin American countries increased at an average annual rate of 4.5% between 2015 and 2019, following the trend for a higher consumer interest in sustainable and higher-quality chocolate. In 2020, however, European imports from Latin America and the Caribbean decreased slightly because of the impact of the global pandemic.

From Latin America and the Caribbean, Europe imported most cocoa beans from Ecuador, with 91 thousand tonnes in 2020, followed by 38 thousand tonnes from the Dominican Republic, and 31 thousand tonnes from Peru. Supplies from Ecuador increased at an average annual rate of 6.5% between 2016 and 2020, while the Dominican Republic and Peru saw their exports to Europe decrease by an average annual rate of 3.7% and 13% respectively. Besides the effects of the global crisis, this decrease is also partly explained by a shift of these countries to exporting semi-finished cocoa products.

Figure 2: Market share of main producing country suppliers of cocoa beans to Europe

2020



Source: Eurostat and International Trade Centre, 2021

Europe also interesting for smaller cocoa bean suppliers

European cocoa bean imports show an interesting dynamic for smaller suppliers in producing countries. For instance, supplies from Sierra Leone, an emerging supplier of organic cocoa to the European market, increased by 14% between 2016 and 2020, amounting to 20 thousand tonnes in 2020.

Imports from DR Congo also increased, at an average annual rate of 11% between 2016 and 2020, amounting to 12 thousand tonnes in 2020. DR Congo is also an important supplier of organic cocoa to the European market.

Central American countries also registered growing export volumes to Europe. Nicaragua was the region's largest cocoa supplier in 2020, with 1.5 thousand tonnes of cocoa beans. Between 2016 and 2020, supply volumes increased at an average annual rate of 8.4%. During the same period, Honduras, Costa Rica, Belize, El Salvador, and Guatemala also registered growth rates of 44%, 3.2%, 24%, 168% and 43% respectively.

Tips:

Regularly check the website of the International Cocoa Organisation and read its [monthly review of the cocoa market](#). Here, you can read about the latest developments in the supply of and demand for cocoa beans and about the international cocoa futures markets.

Access [EU Access2Markets](#) to analyse European trade dynamics yourself and to build your export strategy. By selecting a country as your reporting country, you will be able to follow developments such as trade flows with established suppliers, the emergence of new suppliers and changing patterns in direct and indirect imports.

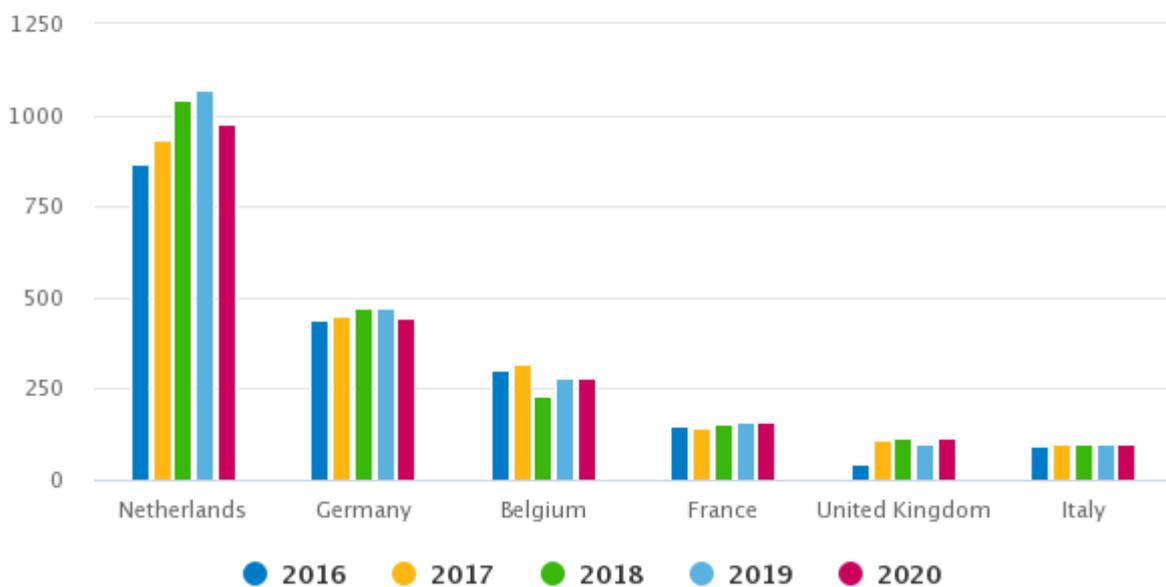
Check the website of the [European Cocoa Association](#) to access the latest data on grinding activities in Europe.

Refer to [our study on trends in the European cocoa market](#) to learn more about which trends offer opportunities in the market.

2. Which European markets offer most opportunities for cocoa?

Given its diverse nature, Europe offers many opportunities to cocoa bean exporters. The European countries that offer the most opportunities show a mixture of high and/or growing import volumes, direct sourcing from producing countries and a broad and diverse base of supplying countries. The Netherlands, Belgium and Germany stand out as the most interesting markets for cocoa exporters. But other markets, such as France, Italy, Spain, the United Kingdom and Switzerland, are also very attractive. The Eastern European markets are smaller and show fewer direct links to producing countries, but are growing at fast rates.

Figure 3: The largest European cocoa bean importers
in 1,000 tonnes



Source: Eurostat and International Trade Centre, 2021

The Netherlands is an important trade hub within Europe

The Netherlands is the largest importer of cocoa beans in the world. In 2020, the Netherlands' total imports amounted to 977 thousand tonnes of cocoa beans. Over 99% of these imports were sourced directly from producing countries, mainly from Ivory Coast, followed by Cameroon, Ghana and Nigeria. Between 2016 and 2020, imports from the Netherlands showed an average annual increase of 3.0% in volume.

Cocoa beans enter the Netherlands via [the port of Amsterdam](#) — the largest cocoa port in the world. The large cocoa processing industry of the Netherlands is located near the port of Amsterdam, housing multinationals such as [Olam](#) and [Cargill](#), as well as Dutch companies such as [Dutch Cocoa](#), [Daarnhouwer](#) and [Theobroma](#).

The Netherlands has the world's largest cocoa grinding industry. In cocoa year 2019/20, the Netherlands had an estimated demand of [600 thousand tonnes](#) of cocoa beans. With origin grindings increasing steadily, it is expected that the cocoa grinding volumes of the Netherlands will decrease in the future. Nevertheless, the Dutch cocoa grinding industry will maintain its important position in cocoa processing, due to its expertise, its focus on innovation and sustainability, and the [concentration of facilities and actors in the Netherlands](#).

The Netherlands is Europe's second-largest exporter of cocoa beans. Although the volume of Dutch re-exports increased at an average annual rate of 2.8% between 2015 and 2019, it saw a sharp decline in 2020 due to COVID-19. Germany is the most important destination of Dutch re-exports, with a market share of 61% in 2020. Re-exports to Germany remained relatively stable in volume between 2015 and 2019 but saw a steep decrease in 2020 due to the global crisis. In the second quarter of 2021, levels have recovered as demand has picked up again.

Germany has a massive cocoa and chocolate industry

In 2020, German imports amounted to 442 thousand tonnes. An estimated 45% of its imports were directly sourced from producing countries, equivalent to 199 thousand tonnes. Between 2016 and 2020, the total volume of cocoa beans directly imported from producing countries remained stable. In 2020, the largest cocoa bean suppliers to Germany were Ivory Coast and Nigeria. Germany has a limited role in trading cocoa beans, with only 2.7% of its cocoa bean imports in 2020 being re-exported again.

Most cocoa beans enter Germany via [the port of Hamburg](#), mainly to meet the needs of the production industry for chocolates and other cocoa products. Germany houses Europe's second-largest cocoa processing industry, with the presence of companies like [August Storck](#), [Schokinag Schokolade Industrie](#), [Cargill](#) and [Barry Callebaut](#).

Germany is Europe's second-largest cocoa grinder at [430 thousand tonnes](#) in 2019/20. The [German Confectionery Industry](#) reported that cocoa grindings increased by 18% in the second quarter of 2021, after a [sharp decrease in the German cocoa and chocolate industry](#) as a result of the COVID-19 pandemic. In 2021, cocoa grinding levels in Germany were almost back to pre-COVID levels again.

Germany houses Europe's largest chocolate manufacturing industry. According to PRODCOM figures, the production value of chocolate products in Germany reached about €5.5 billion in 2019. A large share of the chocolate produced in Germany is exported again, which makes Germany the world's largest exporter of chocolate. Main destination markets for German chocolate products are other European countries, mainly France, Poland and the United Kingdom. In 2020, German chocolate exports reached an estimated export value of [€4.2 billion](#), equivalent to 17% of global chocolate exports.

Belgium interesting for European cocoa bean distribution and chocolate exports

With a 12% share of European cocoa bean imports in 2020, Belgium is the third-largest cocoa bean importer in Europe and the second-largest direct importer. Belgium imported over 99% of its cocoa beans directly from producing countries in 2020, mainly from Ivory Coast, followed by Ghana and Nigeria. In 2020, imports amounted to 278 thousand tonnes.

Cocoa beans enter Belgium via the second-largest cocoa port in Europe, [the port of Antwerp](#). A large share of these imports is then re-exported to other European countries. The main destinations are Germany (56%), France (27%) and the Netherlands (7.0%). This trade role makes Belgium an important entry point for suppliers in producing countries, just like the Netherlands.

Belgium is also a large manufacturer and exporter of chocolate products. Belgian chocolate is famous around the world. In 2020, Belgium accounted for [11%](#) of global chocolate exports, valued at €2.6 billion, making it the second-largest chocolate exporter in the world.

France, Spain, Italy, United Kingdom and Switzerland also interesting markets

France, Spain and Italy each accounted for around 5% of direct European imports from producing countries in 2020. Ivory Coast was the largest supplier of cocoa beans to each of these markets, followed by Ghana. These countries share similar characteristics in terms of market development, with considerable domestic consumption and a significant chocolate industry that pays growing attention to specialty chocolates.

Large cocoa and chocolate value chain actors from these countries include chocolate processors and manufacturers [Ibercacao](#), [Indcresa](#) and [Nederland SA](#) (Spain), chocolate manufacturers [ICAM](#) and [Ferrero](#) (Italy) and importer [Touton](#), as well as chocolate producers [Cémoi](#) and [Valrhona](#) (France).

The United Kingdom is among the largest chocolate consuming countries in Europe, with a per-capita consumption of [8.1 kilogrammes per year](#). The United Kingdom is the seventh-largest importer of cocoa beans

directly from producing countries, with direct imports amounting to 61 thousand tonnes in 2019. The British chocolate market is also becoming more specialised; the increase in artisanal chocolate makers and high-end shops serves more demanding and educated consumers. The United Kingdom also has the largest market for fair trade chocolate.

Switzerland is also home to a strong chocolate manufacturing industry, which produces many famous international brands. Swiss chocolate has a worldwide reputation for high quality, and global demand for it keeps growing. Switzerland is the world's tenth-largest chocolate exporter, at a value of [€637 million](#) in 2020. Swiss consumers have the second-highest per-capita rate of chocolate consumption worldwide at [9.7 kilogrammes](#). In addition, the opportunities in premium products have been growing significantly. The market for [fair trade cocoa is large](#) in Switzerland, as is the market for organic products.

Eastern Europe shows strongest growth in direct imports from producing countries

Eastern European countries registered the highest annual growth rates in direct cocoa bean imports from producing countries between 2016 and 2020. Direct imports to Bulgaria increased strongly: from 32 tonnes in 2016 to over 15 thousand tonnes in 2020. Bulgaria is the region's largest cocoa bean importer and mainly imports from Ivory Coast. Note, however, that numbers are still relatively low compared to other European countries. About 91% of total Bulgarian imports were directly sourced from producing countries in 2020. Direct imports from Estonia also showed a steep increase; from 1,698 tonnes in 2016 to 8,273 tonnes in 2020. Direct imports from Poland increased by 34%, from 2,381 tonnes in 2016 to 7,592 tonnes in 2020.

Tips:

Refer to our country studies for more specific information about a certain market. For instance, access our fact sheets on [Belgium](#), [Eastern Europe](#), [France](#), [Germany](#), [Italy](#), [the Netherlands](#), [Spain](#), [Switzerland](#) and the [United Kingdom](#).

See the websites of the national chocolate confectionery associations for more information about the chocolate industry in these specific countries. For instance, have a look at the sector association of [Germany](#), [the Netherlands](#) or [Belgium](#).

In your target market, check out the websites of big and small chocolate makers, importers and cocoa processors. Their company websites will provide some initial information on where they buy their cocoa and what kind of cocoa they use. For instance, see the website of the Dutch trading company [Daarnhouwer](#) to read more about their cocoa suppliers' profiles.

Visit European trade fairs to find potential business partners. Important cocoa trade fairs in Europe include [Salon du Chocolat](#) (the main event is in Paris, but there are related events in Belgium, Italy and the United Kingdom) and [Chocco](#) (Amsterdam, the Netherlands). Other important trade fairs include [Anuga](#) (Germany), [PLMA](#) (the Netherlands, for private label manufacturing) and [Biofach](#) (Germany, only for organic produce).

Have a look at our study with [Tips for Finding Buyers](#) for more practical recommendations on how to increase your chances of finding buyers on the European cocoa market.

3. Which market segments in the European market have most potential for suppliers in developing countries?

The European cocoa market is vast and diverse, offering opportunities for suppliers of different sizes and profiles. As such, the most interesting market segments for different suppliers will depend highly on your

product quality, whether you provide bulk or specialty cocoa, your volume capacities, as well as your willingness or ability to subscribe to certification schemes.

Bulk and specialty cocoa in the European market

In general, the bulk market for commodity cocoa beans, which makes up more than 90% of the total chocolate market, is highly price-oriented, following the international commodity market and offering limited possibilities for value addition. The bulk market suits exporters that can supply large volumes at standard product qualities. Certification (mostly Rainforest Alliance/UTZ) is increasingly being used in this market as an entry requirement because of stricter sustainability protocols of manufacturers and retailers in Europe.

The specialty market, which is less than 10% of the total chocolate market, offers price differentials for exporters handling higher-quality cocoa beans, such as the fine flavour *Trinitario* and *Criollo* varieties. The European specialty market is growing strongly. This market is also associated with niche segments for organic and fair trade cocoa beans, because of the smaller scale, price premiums and social and environmental impact goals. Read more about the specialty segment [in our study on Exporting specialty cocoa to Europe](#).

Certification grows in both bulk and specialty market

According to the [Cocoa Barometer 2020](#), between 33% and 51% of all the global cocoa production is grown under a certification label or an own company sustainability label. However, it is important to note that not all certified cocoa is purchased as certified. Therefore, as an exporter it is important to certify your cocoa according to market demand and buyer requirements, making sure that certification is economically viable and that it ensures long-term relationships with buyers.

Rainforest Alliance is the main certification scheme for the bulk market for commodity cocoa beans. In this market, certification is mainly used as an entry requirement, making it increasingly difficult for non-certified suppliers to access the European market. In 2020, the estimated production of Rainforest Alliance-certified cocoa beans (either marketed as Rainforest Alliance or UTZ-cocoa) amounted to [1.6 million tonnes](#). That year, cocoa farmers sold about 64% of their cocoa beans production as Rainforest Alliance-certified.

Organic and Fairtrade-certified cocoa beans particularly have seen growing demand in the European cocoa market. There has been a steep increase in sales of cocoa beans that are both organic and Fairtrade-certified. Between 2015 and 2019, cocoa beans that were certified by both standards increased at an average annual rate of 6.9% globally, amounting to [28 thousand tonnes](#) in 2019.

Demand for organic cocoa is growing in high-quality markets in particular. The global cultivation area of organic cocoa reached [3.1%](#) in 2019. The demand for organic cocoa is expected to increase, as the organic chocolate market is expected to grow at an average annual rate of almost [6.8%](#) between 2021 and 2028. European chocolate makers already see this trend, as [Lindt & Sprüngli indicated that their organic sales in Europe are growing much faster than overall chocolate sales](#); the company's organic sales have even endured [the impact of the COVID-19 pandemic](#).

The market for Fairtrade cocoa also continues to grow. A development that drives this growth is, among other things, that European retailers have entered into agreements with Fairtrade to increase the use of Fairtrade cocoa in their confectionery category, such as [retailers Aldi and Lidl](#). Other retailers also use Fairtrade certification for their own private label chocolate brands, such as the retailers [Coop](#) (Switzerland), [REWE](#) (Germany) and [Waitrose](#) (the United Kingdom).

The Fairtrade standard saw major revisions that came into effect in 2019. First, Fairtrade developed [a new version of its main standard for small-scale farmers](#) to ensure that farmers are able to respond to market prices and climate change. Second, the Fairtrade minimum price [for conventional cocoa has increase by 20% as of October 2019, reaching US\\$2,400 per metric tonne](#). The price of Fairtrade-certified organic cocoa will be US\$300 above the market price or the Fairtrade minimum price, depending on which price is higher at the time of sale. These changes are expected to provide an extra incentive for producers and cooperatives to certify their

products under the Fairtrade standard. As of June 2020, [Fairtrade again introduced new requirements for certification](#), which require cocoa cooperatives and traders to have commitments in place for new Fairtrade sales volumes. This to ensure that Fairtrade-produced cocoa is also bought as such, and not as conventional cocoa.

Read more about certified cocoa and interesting European markets in [our study on certified cocoa](#).

Largest markets for certified cocoa and chocolate can be found in Western Europe

Europe is the most important market for certified cocoa in the world. Certification schemes play a very important role as they mirror the growing consumer awareness and changing industry profile towards sustainability. Read the [study on trends in the European cocoa market](#) to learn more about it. The importance of each certification scheme in Europe varies significantly from country to country:

- Rainforest Alliance/UTZ-certified cocoa has its largest market in Europe. Most [Rainforest Alliance-certified cocoa actors](#) are found in Germany, the Netherlands, Italy, Belgium and the United Kingdom. The latter three countries showed the [highest growth in numbers of newly certified supply chain actors in 2018](#). France is also a relatively large market for Rainforest Alliance. Most certified operators located in these countries are chocolate confectionery manufacturers, such as [Barry Callebaut](#) and [Nestlé](#), and traders, like [Daarnhouwer](#) and [Dutch Cocoa](#). You can consult the [guide on how to get Rainforest Alliance certified as a farmer here](#).
- Fairtrade cocoa finds its largest market in the United Kingdom, with general Fairtrade retail sales of over [€1.2 billion](#) in 2020. Other important markets for Fairtrade cocoa are Germany, the Netherlands, Ireland and Switzerland. The market for Fairtrade cocoa is expected to remain large, driven by long-term commitments of retailers and chocolate brands to label their products under the Fairtrade standard. Refer to this [full guidance to learn more on how to become a Fairtrade producer](#).
- Organic: overall retail sales in Europe reached about [€45 billion](#) in 2019, making it the world's second-largest region when it comes to organic retail sales (after North America). The popularity of organic certification for cocoa in specific countries follows the general market for organic products in Europe. The largest national markets for organic foods are Germany (27% of the European market in 2019 with organic retail sales of over €12 billion), France (at €11 billion) and Italy (at €3.6 billion). For organic chocolate specifically, [France plays an important role in the European market](#). In France, an estimated [53%](#) of all chocolate products were certified as organic in 2019. Access [this guide to learn more about the principles of organic cocoa production](#).

Ivory Coast and Ghana are the largest suppliers of certified bulk cocoa beans

The largest suppliers of certified cocoa beans to Europe are Ivory Coast and Ghana. These two countries produce mainly bulk cocoa. They are the [leading countries in Rainforest Alliance and Fairtrade certifications](#) in the world. Sales of Rainforest Alliance-certified cocoa beans from Ivory Coast increased by [4.4%](#) between 2018 and 2020. Ghana's sales of Rainforest Alliance cocoa increased with [34%](#) over the same period. The increase in sales by Ghana is explained by the combination of new producers and new buyers in the certification programme.

Ivory Coast and Ghana also account for the largest amounts of Fairtrade-certified cocoa in the world. About [81%](#) of cocoa sold under the Fairtrade label was supplied by Ivory Coast (70%) and Ghana (11%). They are followed by Latin American suppliers Peru (9.6% of total Fairtrade cocoa sales), the Dominican Republic (6.8%) and Ecuador (1.7%).

When it comes to organic cocoa production, however, Ivory Coast and Ghana play a much smaller role. The Dominican Republic has the largest organic cocoa production, with about [25%](#) of the total organic area in the world in 2019. In 2020, the Dominican Republic was the largest supplier of organic cocoa to the European Union, with [28 thousand tonnes](#). Peru was the second-largest supplier with nearly 10 thousand tonnes in 2020. Africa also has some well-established organic cocoa suppliers, mainly Sierra Leone, DR Congo and Uganda. With data

from 2019, Sierra Leone supplied an estimated [11 thousand tonnes](#) of organic cocoa to the EU, followed by DR Congo with 5.7 thousand tonnes and Uganda with 3.2 thousand tonnes.

Fine flavour flourishes in the European specialty market

There is an increasing demand for specialty and premium chocolate products worldwide. These products are made with high-quality cocoas, often defined as [fine flavour cocoa](#). Fine flavour cocoa accounts for roughly [6%](#) of the world's cocoa production. Despite its small size, it is the fastest-growing segment in the chocolate market. Hence, it offers opportunities for suppliers offering high-quality cocoas.

There is a growing demand for specialty chocolate in traditional European consuming countries, such as [Belgium](#), [France](#), [Germany](#), [Italy](#), [Switzerland](#) and the [United Kingdom](#). Consumption in this segment is associated with high incomes, but also with consumer awareness and market exposure. Mainstream chocolate companies such as Ferrero, Mars and Mondelez have increasingly been investing in premium lines, while retailers have also been developing high-end private label products. This makes specialty chocolates accessible to all types of consumers, at different price levels.

No specific European import data are available for fine flavour cocoa beans, but the International Cocoa Organization has published a [list of the producing countries and the share of their exports that can be classified as fine flavour cocoa](#).

Note that the [specialty cocoa and chocolate markets suffered the most immediate effects of the COVID-19 pandemic](#), since specialty shops, restaurants and other service channels using high-quality chocolate had to close for most of 2020. Chocolate makers and specialised shops found distribution alternatives in e-commerce, online tastings and other promotional tools. As of 2021, the market is expected to recover gradually and to keep on growing in the long term.

Tips:

Read our studies on [certified cocoa](#) and [specialty cocoa](#) to learn more about specific market dynamics and opportunities in these segments in Europe.

Promote sustainable and ethical aspects of your production process. Support these claims with certification. Always, 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 cost-beneficial for your product.

If possible, focus on the premium, specialty and fine flavour cocoa market in Europe. You can only access this market segment if you offer high-quality cocoa. See [our study on buyer requirements](#) to learn more about market requirements.

Want to put specialty cocoa on the European market? Try to establish direct trade relationships with smaller traders and chocolate makers. See our study on our [How to do business on the European cocoa market](#) to learn more.

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