

Exporting culinary dried herbs to Europe

Europe is a large producer of culinary dried herbs, such as thyme, bay leaves and basil. Herbs native to Europe are imported when European production fails to meet demand, for example due to the growing demand for ready-to-use spices and herbs mixtures. Non-native, exotic herbs, such as curry leaves, are also an important segment on the market. In general, imports of culinary herbs have increased over the past years. The most interesting European markets for herbs are Germany and Eastern Europe.

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1. Product description

Herbs are used as flavouring in food and beverages, as fragrances in cosmetics and household products, traditional herbal remedies and as modern medicine. They are used either fresh, dried or as extracts. See our studies on, for example, [natural ingredients for health products](#) to learn more about the use of herbs as medicine.

This study specifically focuses on culinary dried herbs. Culinary herbs generally concern the leafy green parts of a plant. Herbs are distinguished from vegetables in that they are used in small amounts and provide flavour rather than substance to food.

This study focuses on dried thyme, bay leaves, oregano, marjoram and basil. The trade statistics section mainly highlights thyme and bay leaves, since these are the only herbs for which specific trade data is available. In other sections, information on the other herbs is considered as well.

The following codes from the Combined Nomenclature (CN) classification are used in the trade statistics section:

- 0910.9931: Wild thyme, neither crushed nor ground
- 0910.9933: Other thyme, neither crushed nor ground
- 0910.9939: Crushed or ground thyme
- 0910.9950: Bay leaves

Please note that the Eurostat database on Switzerland, Norway and Iceland only provides trade statistics up to HS 6-digit. This means that the analysis below on imports and exports only takes the European Union (EU) into account.

2. What makes Europe an interesting market for culinary dried herbs?

The European herbs market can be divided into:

- herbs native to Europe, such as basil and oregano;
- non-native herbs such as tropical and sub-tropical herbs, including lemon grass, curry leaves, kaffir lime leaves, coriander leaves and Asian basil.

Europe is already a major producer of native herbs. However, you will be able to compete with European

producers if you are able to supply similar quality at a better price. In addition, there are also opportunities in the market for ethnic (non-native) herbs, as demand is growing.

European imports of bay leaves are growing steadily

Between 2013 and 2017, overall European imports of bay leaves grew steadily, as well as imports supplied by developing countries. Since 2013, European imports from developing countries increased annually by 2% in volume and 5% in value. In 2017, these imports reached 2.1 thousand tonnes, with a value of €9.8 million.

Poland and Germany are the main importers of bay leaves

The main markets for bay leaves in Europe are Poland and Germany. Although their imports between 2013 and 2017 increased less on average than for the other leading European importers (+2% annually in volume), they managed to keep their top position. Together, these two countries represented 36% of the European bay leaf market in 2017. This makes them interesting targets market for developing country suppliers, especially since both countries source most of their imports directly in developing countries.

Other interesting markets are:

- UK: on average, imports increased annually by 23% in volume and 2% in value since 2013.
- Spain: on average annually since 2013, +9% in volume and +13% in value.
- Belgium: on average annually since 2013, +15% in volume and +13% in value.
- France: on average annually since 2013, -4% in volume and +5% in value.

Together, these four countries represented 34% of the European bay leaf market in 2017, which makes them, together with Poland and Germany, interesting target markets for developing country exporters.

Smaller but upcoming markets are:

- Romania: imports increased by 12% annually in volume since 2013, with a 5% market share in 2017.
- The Netherlands: 0% growth, with a 5% market share in 2017.
- Czech Republic: +2%, with a 3% market share.
- Austria: +2%, with a 3% market share.
- Latvia: +26%, with a 2% market share.

European imports of thyme from developing countries are increasing significantly

As is illustrated in Figure 3, European imports of thyme from developing countries increased significantly, with an annual increase of 10% in volume since 2013.

Imports from developing countries reached 2.5 thousand tonnes in 2017, representing a value of €7.6 million.

Wild thyme, cultivated whole thyme and cultivated crushed or ground thyme can be tracked through different trading codes. The different thyme products and their specific import developments show an interesting outlook on the thyme market:

- 106 tonnes of wild thyme were imported from developing countries in 2017, while imports of wild thyme from these countries decreased slightly by 5.5% between 2013 and 2017;
- 1,372 tonnes of whole thyme (cultivated) were imported from developing countries in 2017, while imports from these countries increased by 5% between 2013 and 2017;
- 996 tonnes of crushed and ground thyme (cultivated) were imported from developing countries in 2017, while imports of wild thyme from these countries increased by 22% between 2013 and 2017.

Germany becomes the main European importer of thyme again

After the United Kingdom took over the position of main European importer of thyme in 2016, Germany again became the leader in 2017. Overall, the United Kingdom did manage to show the highest average annual increase between 2013 and 2017 (+11%), while German imports increased by 6%. However, Italy demonstrated the highest annual increase: nearly 40% between 2013 and 2017.

Together, the United Kingdom, Germany and Italy accounted for 50% of European thyme imports in 2017.

Other interesting markets are:

- France: imports have increased at an annual rate of 5% since 2013. Its market share was 8% in 2017.
- Spain: in 2017, Spain represented 8% of the European thyme market. Its imports have increased annually by 7% in volume since 2013.
- The Netherlands: in 2017, the Netherlands represented 8% of the European thyme market. Its imports have increased annually by 9% in volume since 2013.

Smaller but upcoming markets are:

- Belgium: imports have increased at an annual rate of 5% in volume since 2013. The market share in 2017 was 7%.
- Ireland: +54% annually, with a 5% market share.
- Austria: +11%, with a 2% market share.
- Hungary: imports increased by 38%, with a 2% market share.

European consumers are looking for convenience and new, exotic recipes

Demand for easy-to-prepare meals is increasing in Europe. European consumers are spending less and less time on preparing meals, due to busy schedules and the increasing number of single households. In addition, consumers are becoming more familiar with ethnic cuisines due to the influence of internet, the various immigrant populations and the growing number of travelers.

As a result, European companies are selling more and more ready-to-use spices and herbs mixtures that can be used for ethnic cuisine. Examples include:

- Euroma's Jonnie Boer range of products: [spice mixture Al-Andalus](#) containing, for example, bay leaves and oregano.
- Verstegen's spice and herb mixture: [Mix cajun](#) containing, for example, thyme, basil and oregano.

Tips:

Ask buyers for their recipes or look at recipes that are already on the market to learn more about the most popular herbs on the market.

Check websites of European spice and herb companies to see which mixtures are popular. You can find most of these companies on the website of the [European Spice Association](#).

Growing awareness of sustainability

European buyers pay more and more attention to their responsibility for the social and environmental impact of their activities. The most important issues European buyers are concerned with include:

- child labour

- healthy and safe working conditions
- respecting labour laws
- paying minimum wage
- correct use of pesticides (if only for meeting the legal limits for residues, the so-called maximum residue levels).

As a supplier, you will be increasingly faced with sustainability requirements from your buyer. Many buyers see sustainable sourcing as a must.

By certifying your herbs, you can prove compliance with sustainable sourcing. Currently, two types of sustainability certification are common:

- Business-to-business certification such as [amfori BSCI](#) and [SEDEXMETA](#), which are quickly becoming mandatory in business-to-business trade. Such business-to-business certification will help you gain market access, although buyers in the mainstream market are not always willing to pay more for certified products. It is therefore important to discuss the opportunities for certification with your buyers before you get certified.
- Certification with a consumer logo such as organic, fair trade and Rainforest Alliance (see also below). Certified herbs with a consumer logo, are still a niche market. It represents only a small section in the total European market for herbs.

Tips:

If you want to become more sustainable, start by addressing the most important issues mentioned above. Then look at more strategic choices. Determine which core values you want to work with, such as social, environmental or both.

Monitoring your performance on sustainability through audits, verification or selfverification is a way to be rewarded for your efforts, either by opening up new markets and/or receiving a price premium.

Sustainability can provide opportunities for you locally as well as regionally, as sustainability is becoming more important all around the world. The faster you move into the market for sustainable products, the larger your competitive advantage will be.

For more information, read our study on the [sustainable spices and herbs market in Europe](#).

See our study about [buyer requirements in Europe](#) for spices and herbs for more information about certification and other related topics.

3. What requirements should culinary dried herbs comply with to be allowed on the European market?

You can only export dried culinary herbs to Europe if you comply with [buyer requirements for spices and herbs](#). Below you will find more information related to requirements that are specific to culinary herbs.

Legal requirements

When exporting dried culinary herbs to Europe, you have to comply with the following legally binding requirements:

- Food safety: traceability, hygiene and control as specified in the [General Food Law](#).
- [Maximum residue levels of pesticides](#): The use of pesticides is an important issue for herbs. European legislation has only set limits for pesticide residues in fresh herbs. The European Spice Association has therefore developed [dehydration limits](#) for pesticides in dried herbs that they suggest their members use.

- **Microbiological contamination:** Your dried herbs are banned from the market if *Salmonella* is found.
- **Food additives and adulteration:** Spices and spice blends are rejected by custom authorities if they contain undeclared, unauthorised or too large amounts of extraneous materials. For herbs, **the maximum amount allowed is 2%**.
- **Maximum levels of polycyclic aromatic hydrocarbons (PAHs):** Contamination with PAHs is the result of bad drying practices.
- **Irradiation:** this is allowed, but not commonly used.

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

Research is being conducted into alternatives to steam sterilisation, as this treatment negatively affects the taste of the spices and herbs. Currently, it is still the cheapest and safest method to combat microbiological contamination.

Tips:

Check the [Rapid Alert System for Food and Feed \(RASFF\) database](#) for examples of withdrawals of herbs from the market and the reasons behind these withdrawals. Withdrawals of herbs do not occur often. However, you should keep in mind that withdrawals can occur and avoid them at all costs. A withdrawal will influence the reputation of your herbs as well as the reputation of your country as a supplier.

Comply with requirements as listed above. Your buyer will transfer costs for cleaning contaminated herbs to you if you do not.

Always discuss with your (potential) buyers if they want steam sterilisation. If you cannot sterilise your herbs yourself, look for local sterilisation companies that can provide this service for you.

Comply with food safety requirements during drying, storage, processing (such as sieving, mixing, grinding or crushing), packaging and transport.

You also need to prevent contamination with mycotoxins and other contaminants because steam sterilisation cannot remove these.

Keep up to date with the development of steam sterilisation alternatives by checking online sources, such as [GreenFoodDec](#).

Additional requirements

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

- **Food safety certification as a guarantee:** The most important food safety management systems in Europe are the BRC Global Standard for Food Safety of the British Retail Consortium ([BRC](#)), International Featured Standards ([IFS](#)), Food Safety System Certification 22000 ([FSSC22000](#)) and Safety Quality Food ([SQF](#)). Always verify your buyer's preference for a specific food safety management system, as some may prefer one system over the other. For example, BRC was developed by retailers in the United Kingdom and is more commonly demanded in this market. 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, such as the Supplier Ethical Data Exchange ([SEDEX](#)), Ethical Trading Initiative ([ETI](#)), or Business Social Compliance Initiative ([BSCI](#)).

Requirements for niche markets

If you want to enter a niche market such as organic or fair trade, it is essential that you comply with the following standards:

- Sustainable product certification: the most popular certification systems are [organic](#), [Fairtrade](#) and [Rainforest Alliance](#).
- Selfverification: suppliers assess their own compliance with the sustainability code of buyers. Examples include Unilever's [Sustainable Agricultural Code](#) (SAC) or the [Olam Livelihood Charter](#).

Quality requirements

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

The European Spice Association Quality Minima Document specifies the chemical and physical parameters dried culinary herbs need to comply with when sold in Europe before crushing and grinding:

Product	Ash maximum	Acid-insoluble ash maximum	Moisture maximum	Volatile oil minimum
Bay leaves	7.0	2.0	8.0	1.0
Thyme	12	3.5	12	1.0
Oregano	10	2.0	12	1.5
Marjoram	10	2.0	12	0.7
Basil	16	2.0	12	1.0

The ESA has not developed cleanliness specifications. Therefore, European buyers often use the specifications for cleanliness drawn up by the [American Spice Trade Association \(ASTA\)](#).

Tips:

Check [the different ISO guidelines](#) for general guidelines on the grading, handling and packing of your herbs.

Check the [European Spice Association Quality Minima Document](#) for more information on the chemical and physical parameters that your unprocessed herbs needs to comply with when it is sold in Europe

Labelling requirements

Correct labelling is important for European buyers. Therefore, pay extra attention to labelling your product.

For herbs packed in bulk, you must include the following information:

- the name of the product
- details of the manufacturer (name and address)
- batch number
- date of manufacture
- product grade
- producing country

- harvest date (month/year)
- net weight.

Other information that exporting and importing countries may require include a barcode, producer and/or packager code, and any extra information that can be used to trace the product back to its origin.

Tip:

See our study on the [European market for value-added spices and herbs](#) for requirements on consumer packaging and labelling. In Europe, there are very strict requirements for packaging and labelling of consumer products. These differ from the requirements mentioned here.

Packaging requirements

Herbs that have not been crushed or ground are usually packaged in new, clean dry bags made of jute, paper, cloth laminated with polyethylene or polypropylene, or in high-density polyethylene bags/pouches.

Crushed or ground herbs can be packaged in new, clean, dry containers made of tin or glass, or in pouches made of laminated, extruded, metallised, multilayer food grade plastic materials. The containers must be free from insect infestation, fungus contamination, undesirable or bad smells and substances that may damage the contents.

Tips:

Always ask your buyers for their specific packaging requirements.

Store packaged herbs in a dry, cool place to prevent quality deterioration.

If you offer organic certified herbs, physically separate these from herbs that are not certified.

See the website of [Practical Actions](#) to learn more about improving preharvest handling and processing of herbs.

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

4. What competition do you face on the European culinary dried herbs market?

Europe is a large producer of dried herbs

All of the dried herbs discussed in this study are also produced in Europe in significant amounts. The main European producing regions for various herbs are the following.

- Bay leaves: produced throughout the European Union, such as in the Netherlands, Germany and Poland
- Thyme: Mediterranean countries, such as Spain and Portugal
- Oregano: Mediterranean countries, such as Italy and Spain
- Marjoram: produced throughout the European Union, but mainly in southern countries, such as Spain, Greece and Italy
- Basil: western Europe and Mediterranean countries, such as France, Germany and Spain

These countries are strong competitors for your dried herbs, since the companies located here will have a strong network, while transport costs to other European countries are low. However, their production costs will probably be higher. You will be able to compete with them if you are able to supply similar quality at a better price.

Since most herbs are also produced in Europe, companies are able to supply fresh herbs as well. These fresh, high-quality herbs are also a strong competition for your dried herbs. Many consumers prefer fresh herbs. On the other hand, dried herbs are more interesting in terms of price and shelf life, while seasonality does not play a role in the supply.

Tip:

Have a look at websites of your European competitors, such as [VNK Herbs](#).

Main non-European competition differs per product

The main supplier of bay leaves is Turkey. The market share of Turkey in its supplies to Europe was 68% in 2017 (including European suppliers).

Other smaller non-European suppliers are Morocco and India. However, these countries both represent only 1% of suppliers to Europe.

Thyme is mainly supplied by Europe itself. Non-European suppliers are:

- Morocco (8% of market share in 2017)
- Turkey (6%)
- Egypt (3%).

For oregano, the main non-European producing countries/regions are:

- Turkey
- Central America.

For marjoram, the main non-European producing countries/regions are:

- Russia
- northern Africa
- United States of America
- China
- India.

For basil, the main non-European producing countries/regions are:

- Middle East
- northern Africa (mainly Egypt)
- United States of America.

Tip:

See [our study on the European market for fresh herbs](#) for more information.

5. Which channels can you use to put culinary dried herbs on the European market?

In addition to the channels and segments described in that study, the market for dried herbs could be also segmented into:

- herbs native to European diets;
- non-native herbs, such as tropical and sub-tropical herbs.

Herbs native to Europe are produced on a large scale in Europe itself, such as basil and oregano. However, these native herbs are also imported if the:

- local production does not meet demand due to crop failure or increasing demand;
- production of the herbs is significantly cheaper outside of Europe.

Non-native herbs, such as curry leaves, are mostly found in niche markets in Europe, such as speciality Asian shops. However, more and more European consumers are starting to adopt non-European cooking. These herbs are therefore also sold in an increasing number of mainstream supermarkets. As an exporter of non-native herbs, you can find increasing opportunities in these segments.

Tips:

See our studies on [tips to find buyers](#) and [tips to do business](#) for the spices and herbs market.

Learn more about the different non-native and native European herbs to understand which market segment your herb belongs to. Look for example on the website of the [Organic Herb Trading Company](#) for more information

See our study on [buyer requirements](#) for the spices and herbs market to learn more about specific buyer requirements in Europe.

Invest or look for investments to improve post-harvest processing, quality and extra cleanliness (depending on your current level of professionalism). It can earn you a premium similar to further processing and is easier to undertake.

6. What are the end-market prices for culinary dried herbs?

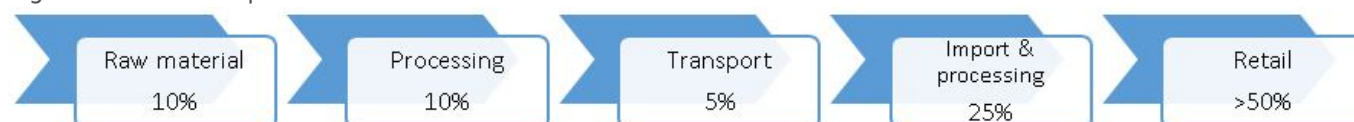
Table 1: Overview of selected end-market prices

Brand and product	Retailer	Price and packaging size
Bay leaves		
Verstegen zakje laurierblad (whole)	Albert Heijn, the Netherlands	€1.39 / 4 grams
REWE Lorbeerblätter (organic and whole)	REWE, Germany	€2.49 / 5 grams
Ducros Laurier feuilles entières (whole)	Carrefour, France	€1.62 / 17 grams
LA ESPECIERA Laurel hojas (whole)	Alcampo, Spain	€1.20 / 40 grams
Thyme		
Euroma Tijm	Albert Heijn, the Netherlands	€1.99 / 14 grams
Ostman Thymian gerebelt	REWE, Germany	€2.89 / 30 grams
Ducros Thym branches entières	Carrefour, France	€1.60 / 17 grams
Oregano		
Verstegen zakje Oregano	Albert Heijn, the Netherlands	€1.39 / 8 grams
Goutess Oregano (whole)	REWE, Germany	€2.49 / 4.5 grams
Carrefour Bio (organic)	Carrefour, France	€2.20 / 12 grams
CARMENCITA Orégano	Alcampo, Spain	€2.66 / 35 grams
Marjoram		
Ostman Marjoran gerebelt	REWE, Germany	€1.99 / 7.5 grams
Jumbo Marjolein gedroogd	Jumbo, the Netherlands	€0.99 / 4 grams
Basil		
Verstegen basilicum	Albert Heijn, the Netherlands	€1.98 / 11 grams
REWE Basilikum gerebelt	REWE, Germany	€1.89 / 12 grams
Ducros Basilic	Carrefour, France	€1.78 / 11 grams
Ducros Albahaca	Alcampo, Spain	€1.33 / 12 grams

Source: Websites of European retailers: Albert Heijn, REWE, Carrefour and Alcampo

The table above gives an overview of the end-market prices for the different dried herbs in this study. However, you should note that the actual end-market prices for dried herbs are very different from the global trade prices. Figure 5 gives an approximate price breakdown and the margins added by retailers.

Figure 5: Indicative price breakdown for dried herbs



Source: ProFound, 2017

These margins are influenced by various factors, including the following.

- Country of origin
- Current and expected future harvest situation: If European production of several dried herbs fails, increasing demand for nonEuropean dried herbs will affect the prices.
- Quality of the raw material: When you are able to supply a higher quality herb which you have, for example, cleaned by steam sterilisation, you will be able to ask a higher price.
- Level of processing: The price depends on whether you are able to only dry or also further process your dried herbs. You should realise that buyers have strict requirements for products that are processed further. See the section on buyer requirements for more information.
- Level of demand: for example several dried herbs are produced in Europe as well, which means the demand for nonEuropean supplies can differ.


Tips:

See the websites of [Nedspice](#) and [ITC Trade Map](#) for upto-date information on national and international prices for dried herbs.


Establish longlasting relationships with your buyers. Buyers are willing to pay higher prices to suppliers that are able to help secure supply, comply with delivery times as well as food-safety requirements. They will also be more willing to invest in your partnership.

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