



Annex – Spices and herbs import trends in Europe

This section contains a further analysis of European imports of spices and herbs from developing countries, segmented in three groups:

1. Large trade volumes of more than 10,000 tonnes
2. Medium-sized volumes between 1,000-10,000 tonnes
3. Small volumes of less than 1,000 tonnes.

As this annex is primarily focussed on the selection of priority spices and/or herbs, we have used volumes in tonnes as market price developments for individual spices can have a substantial impact on import values (such as with vanilla and pepper in the period under review).

Please note that:

- This volume analysis is only feasible with help of the [Eurostat database](#), and not with [Trade Map](#). Since Eurostat does not include trade data of the United Kingdom, Norway and Switzerland, this annex only covers data on the EU27.
- Volume shares of individual supplying countries are roughly in line with value shares; differences are negligible.

Top products – more than 1,000 tonnes

The table below gives the details for the products that all reach an EU import volume of more than 10,000 tonnes. Within these, unprocessed ginger contributed to the growth of EU imports the most, at quite some distance followed by dried fruit of the genus capsicum/pimenta, unprocessed pepper, and curcuma.

Imports of unprocessed pepper of the genus piper are the most diversified, with the largest supplying country - Vietnam - accounting for 'only' 47% of the developing country total. This means that, while there's already some competition in terms of supplying countries, there might be opportunities for new supplying countries too.

Within the top products both ginger and curcuma on average show double digit growth over the last 5 years for imports into Europe. When looking exclusively to imports from developing countries in Table 2, in particular curcuma stands out as a high growth import product.

Table 1: European import volumes (tonnes) from [developing countries \(DCs\)](#) by top products, including leading suppliers and shares (suppliers from other regions are underlined; the accessory share represents their share in EU imports).

Product	Import Volume 2020 from DCs	Absolute growth '16-'20	#1 supplier and share	#2 supplier and share	#3 supplier and share	#4 supplier and share	#5 supplier and share	#6 supplier and share	#7 supplier and share
09101100 ginger, unprocessed (note that a large share is fresh ginger)	116,702	37,191	China (66%, a lot is fresh)	Peru (19%, a lot is fresh)	Brazil (11%, all is fresh)	Nigeria (2%)	Thailand (1%)		
09042200 fruits of the genus capsicum or of the genus pimenta, processed	46,298	13,622	China (73%)	Thailand (11%)	India (7%)	Turkey (4%)	Tunisia (1%)	Serbia (1%)	Peru (1%)
09041100 pepper of the genus piper, unprocessed	58,646	9,539	Viet Nam (47%)	Brazil (35%)	Indonesia (7%)	India (4%)	Cambodia (2%)	Sri Lanka (2%)	Madagascar (1%)
09042190 dried fruit of genus capsicum or pimenta, unprocessed (excl. sweet peppers)	52,262	9,513	China (71%)	Peru (18%)	Mexico (5%)	South Africa (1%)	India (1%)		
09103000 turmeric "curcuma"	16,278	6,732	India (77%)	Peru (14%)	Madagascar (2%)	China (1%)	Viet Nam (1%)	Thailand (1%)	

Source: Eurostat (2021)



Table 2: European import volumes (tonnes), total and from developing countries by top 5 products, including share from developing countries, 2020, and annual growth rates in 2016-2020.

Product	Total import volume 2020	Import volume from developing countries 2020	Import share from developing countries 2020	Average annual import growth rate '16-'20	Average annual growth rate of imports from developing countries '16-'20
09101100 ginger, unprocessed (note that a large share is fresh ginger)	172,161	116,702	68%	9.6%	10.1%
09041100 pepper of the genus piper, unprocessed	74,675	58,646	79%	3.6%	4.5%
09042190 dried fruit of genus capsicum or pimenta, unprocessed (excl. sweet peppers)	55,088	52,262	95%	4.6%	5.2%
09042200 fruits of the genus capsicum or of the genus pimenta, processed	88,492	46,298	52%	7.7%	9.1%
09103000 turmeric "curcuma"	22,285	16,278	73%	13.4%	14.3%

Source: Eurostat (2021)

Top 6-23 products – imports between 1,000 and 10,000 tonnes

In the group of products that are good for between 1,000 to 10,000 tonnes of EU imports (Table 3), the following products substantially contributed to overall growth:

- Cinnamon, processed;
- Pepper of the genus piper, processed;
- Fenugreek seed;
- Nutmeg, processed;
- Spices, processed.

Also dried sweet peppers, curry, and bay leaves have performed strongly, which can be concluded from the absolute growth figures in table 3.

Several spices show quite a diversified supply, with the top 4 being:

1. Processed mixtures of different types of spices, with 7 supplying countries each with more than 4% share (an important difference with previous years when there were only for supplying countries).
2. Unprocessed spices with 6 supplying countries each with more than 10% share (note that this is an undefined category meaning that the large number of supplying countries does not say that much).
3. Processed ginger with 6 countries each more than 4% share.
4. Processed spices with 6 supplying countries each with more than 3% share.

While there's already some competition in terms of supplying countries for these spices, there might be opportunities for new supplying countries too.

Note that for some products, there is strong competition from East European countries. For coriander seeds there is strong competition from Russia and also from the European countries of Poland and Romania (note: not included in the table below). Thyme predominantly comes from Poland and also Spain is an important supplier of this herb (note: both countries are not included in the table below).



Table 3: European import volumes (tonnes) from developing countries by top 6-23 products, including leading suppliers and shares (suppliers from other regions are underlined; the accessory share represents their share in EU imports).

Product	Import Volume 2020 from DCs	Absolute growth '16-'20	#1 supplier and share	#2 supplier and share	#3 supplier and share	#4 supplier and share	#5 supplier and share	#6 supplier and share	#7 supplier and share
09042110 dried sweet peppers (excl. processed)	9,258	516	China (49%)	Brazil (20%)	Peru (12%)	Zimbabwe (5%)	Serbia (5%)	Uzbekistan (1%)	Malawi (1%)
09041200 pepper of the genus piper, processed	8,568	1,166	Viet Nam (65%)	India (13%)	Brazil (9%)	Indonesia (6%)	China (3%)	Turkey (1%)	Sri Lanka (1%)
09061900 cinnamon and cinnamon-tree flowers	7,660	2,541	Indonesia (69%)	Viet Nam (17%)	Madagascar (5%)	China (4%)	Sri Lanka (2%)		
09101200 ginger, processed	5,947	8	China (35%)	Nigeria (34%)	India (10%)	Côte d'Ivoire (5%)	Viet Nam (4%)	Peru (4%)	Burkina Faso (2%)
09109999 spices, processed	5,335	811	Turkey (42%)	China (16%)	India (11%)	Egypt (5%)	Pakistan (3%)	Lebanon (3%)	Thailand (2%)
09109991 spices, unprocessed	4,941	-471	Egypt (17%)	India (16%)	Thailand (16%)	Turkey (13%)	Syria (12%)	Brazil (10%)	Viet Nam (2%)
09062000 processed cinnamon and cinnamon-tree flowers	4,864	1,246	Viet Nam (41%)	Indonesia (36%)	China (13%)	Sri Lanka (4%)	Madagascar (3%)	India (2%)	
09092100 coriander seeds, unprocessed	3,843	-1,138	Ukraine (51%)	Morocco (25%)	Syria (8%)	Turkey (5%)	India (5%)	Egypt (4%)	Thailand (1%)
09109910 fenugreek seed	3,114	881	India (88%)	Egypt (5%)	Tunisia (3%)	Turkey (2%)	Morocco (1%)		
09061100 cinnamon "cinnamomum zeylanicum blume" (excl. crushed and ground)	2,716	-824	Madagascar (37%)	Indonesia (24%)	Sri Lanka (23%)	Viet Nam (9%)	Tanzania, United Republic of (3%)	China (2%)	India (1%)
09081200 nutmeg, processed	2,302	835	Indonesia (86%)	Viet Nam (7%)	Sri Lanka (4%)	India (3%)			
09109950 bay leaves	2,165	191	Turkey (92%)	Syria (3%)	Morocco (1%)	Georgia (1%)	Bangladesh (1%)	Albania (1%)	
09081100 nutmeg, unprocessed	2,161	-268	Indonesia (85%)	Grenada (10%)	Sri Lanka (3%)	India (1%)			
09083100 cardamoms, unprocessed	1,929	332	Guatemala (91%)	India (3%)	Honduras (2%)	Viet Nam (2%)			
09071000 cloves, whole fruit, cloves and stems, unprocessed	1,854	-8	Madagascar (46%)	Indonesia (23%)	Sri Lanka (12%)	Tanzania (4%)	India (1%)		
09109105 curry	1,843	344	India (77%)	Sri Lanka (12%)	China (5%)	Pakistan (3%)	Turkey (1%)	Thailand (1%)	
09109190 processed mixtures of different types of spices	1,457	-90	Pakistan (17%)	Lebanon (13%)	India (12%)	Turkey (12%)	Syria (9%)	Thailand (8%)	China (4%)
09109933 thyme (excl. processed and wild thyme)	1,413	16	Egypt (45%)	Morocco (29%)	Turkey (7%)	Kenya (6%)	Jordan (4%)	Albania (3%)	India (1%)

Source: Eurostat (2021)

For this second group of products, unprocessed cinnamon, processed nutmeg and fenugreek seed show relatively strong growth over the last 5 years for imports into Europe. When looking exclusively to imports from developing countries in table 4, in particular processed nutmeg and unprocessed cinnamon stands out as a high growth (double digit!) import product.



Table 4: European import volumes (tonnes), total and from [developing countries](#) by top 6-23 products, including share from developing countries, 2019, and annual growth rates in 2015-2019.

Product	Total import volume 2020	Import volume from developing countries 2020	Import share from developing countries 2020	Average annual import growth rate '16-'20	Average annual growth rate of imports from developing countries '16-'20
09042110 dried sweet peppers (excl. processed)	12,976	9,258	71%	2.1%	1.4%
09041200 pepper of the genus piper, processed	23,644	8,568	36%	-2.2%	3.7%
09061900 cinnamon and cinnamon-tree flowers	9,190	7,660	83%	9.0%	10.6%
09101200 ginger, processed	11,029	5,947	54%	2.3%	0.0%
09109999 spices, processed	34,174	5,335	16%	4.7%	4.2%
09109991 spices, unprocessed	18,464	4,941	27%	-3.4%	-2.3%
09062000 processed cinnamon and cinnamon-tree flowers	10,741	4,864	45%	5.3%	7.7%
09092100 coriander seeds, unprocessed	16,293	3,843	24%	4.9%	-6.3%
09109910 fenugreek seed	4,094	3,114	76%	7.9%	8.7%
09061100 cinnamon "cinnamomum zeylanicum blume" unprocessed	3,871	2,716	70%	-5.0%	-6.4%
09081200 nutmeg, processed	4,138	2,302	56%	8.0%	11.9%
09109950 bay leaves	2,915	2,165	74%	2.2%	2.3%
09081100 nutmeg, unprocessed	3,940	2,161	55%	3.3%	-2.9%
09083100 cardamoms, unprocessed	2,784	1,929	69%	7.9%	4.8%
09071000 cloves, whole fruit, cloves and stems, unprocessed	3,390	1,854	55%	6.0%	-0.1%
09109105 curry	4,825	1,843	38%	4.8%	5.3%
09109190 processed mixtures of different types of spices	42,163	1,457	3%	6.5%	-1.5%
09109933 thyme (excl. processed and wild thyme)	5,728	1,413	25%	6.6%	0.3%

Source: Eurostat (2021)



Top 24-35 products – less than 1,000 tonnes of EU imports

Details for the group of products with less than 1,000 tonnes of European imports are shown in Table 5. The second largest product, unprocessed vanilla, experienced a very strong decline and therefore had a strong impact on aggregate growth of this group. The strongest

contributors to growth were **processed mace, spice mixtures and processed cloves**. (More than) Seven developing countries supplied spice mixtures to Europe in 2020, which is quite an interesting development compared to previous years.

Table 5: European import volumes (tonnes) from developing countries by top 24-35 products, including leading suppliers and shares (suppliers from other regions are underlined; the accessory share represents their share in EU imports).

Product	Import Volume 2020 from DCs	Absolute growth '16-'20	#1 supplier and share	#2 supplier and share	#3 supplier and share	#4 supplier and share	#5 supplier and share	#6 supplier and share	#7 supplier and share
09109939 Thyme, processed	869	-135	Syria (27%)	Turkey (20%)	Lebanon (12%)	India (11%)	Jordan (9%)	Albania (7%)	Egypt (7%)
09051000 Vanilla, unprocessed	691	-388	Madagascar (84%)	Indonesia (6%)	Papua New Guinea (4%)	Mauritius (1%)	Uganda (1%)	French Polynesia (1%)	
09092200 Coriander seeds, processed	584	-111	India (32%)	Viet Nam (25%)	Morocco (15%)	Turkey (8%)	Ukraine (6%)	Bangladesh (5%)	Egypt (4%)
09082200 Mace, processed	526	229	Indonesia (85%)	Viet Nam (9%)	Sri Lanka (3%)	Papua New Guinea (2%)	India (1%)		
09082100 Mace, unprocessed	279	-203	Indonesia (86%)	Sri Lanka (11%)	Grenada (1%)	Costa Rica (1%)			
09072000 Cloves, whole fruit, cloves and stems, processed	189	89	Viet Nam (37%)	Indonesia (33%)	Sri Lanka (15%)	Madagascar (9%)	India (2%)	Turkey (1%)	
09109110 Mixtures of different types of spices (unprocessed)	178	124	China (30%)	Thailand (13%)	Pakistan (10%)	Syria (5%)	India (3%)	Bangladesh (3%)	Lebanon (2%)
09052000 Vanilla, processed	125	-18	Madagascar (70%)	Mauritius (7%)	Morocco (6%)	Indonesia (5%)	India (5%)	South Africa (3%)	Turkey (1%)
09109931 Wild thyme "Thymus serpyllum" (unprocessed)	84	-60	Albania (36%)	Egypt (32%)	Morocco (4%)	Lebanon (3%)	Jordan (1%)	Turkey (1%)	Ukraine (1%)
09102010 Saffron, unprocessed	82	5	Afghanistan (3%)	Morocco (1%)	Dominica (1%)	China (1%)			
09083200 Cardamoms, processed	50	25	India (36%)	Lebanon (18%)	Turkey (12%)	Guatemala (7%)	Syria (2%)	Sri Lanka (2%)	Pakistan (1%)
09102090 Saffron, processed	6	-22	India (38%)	Turkey (4%)	Afghanistan (4%)	Thailand (3%)	Mauritius (2%)	Lebanon (1%)	Morocco (1%)

Source: Eurostat (2021)



For this last group of products, unprocessed saffron, processed cardamoms, and processed mace show on average double-digit growth over the last 5 years for imports into Europe. When looking exclusively to imports from developing countries in table 6, in particular mixtures of unprocessed spices and processed cardamoms stand out as a high growth (double digit!) import product.

Table 6: European import volumes (tonnes), total and from [developing countries](#) by top 24-35 products, including share from developing countries, 2020, and annual growth rates in 2016-2020.

Product	Total import volume 2020	Import volume from developing countries 2020	Import share from developing countries 2020	Average annual import growth rate '16-'20	Average annual growth rate of imports from developing countries '16-'20
09109939 Thyme, processed	2,269	869	38%	3.1%	-3.6%
09051000 Vanilla, unprocessed	1,067	691	65%	-10.7%	-10.5%
09092200 Coriander seeds, processed	3,856	584	15%	3.6%	-4.2%
09082200 Mace, processed	820	526	64%	10.5%	15.4%
09082100 Mace, unprocessed	369	279	75%	-12.7%	-12.8%
09072000 Cloves, whole fruit, cloves and stems, processed	582	189	32%	6.6%	17.3%
09109110 Mixtures of different types of spices (unprocessed)	6,525	178	3%	-0.8%	34.4%
09052000 Vanilla, processed	1,193	125	10%	5.1%	-3.3%
09109931 Wild thyme "Thymus serpyllum" (unprocessed)	649	84	13%	-4.3%	-12.6%
09102010 Saffron, unprocessed	544	82	15%	27.8%	1.7%
09083200 Cardamoms, processed	612	50	8%	12.8%	19.1%
09102090 Saffron, processed	907	6	1%	6.2%	-31.0%

Source: Eurostat (2021)



European spices and herbs imports from CBI countries

This section contains a further analysis of European imports of spices and herbs from CBI countries. Again, the products have been segmented in three groups:

1. Large trade volumes of more than 1,000 tonnes
2. Medium-sized volumes between 200-1,000 tonnes
3. Small volumes of less than 200 tonnes.

CBI countries cover the following set of countries:

- Middle East and North Africa: Algeria, Egypt, Jordan, Lebanon, Morocco, Palestinian Territories, Tunisia.
- East Africa: Ethiopia, Kenya, Sudan, Uganda.
- West Africa and Sahel: Benin, Burkina Faso, Chad, Ghana, Ivory Coast, Mali, Niger, Nigeria, Senegal.
- Asia: Bangladesh, Indonesia, Myanmar, Sri Lanka.

Top 10 products – more than 1,000 tonnes

Table 7 gives the details for the 10 products that all reach an EU import volume of more than 1,000 tonnes. Within this top 10, processed nutmeg contributed to the growth of EU imports the most, followed by processed ginger and thyme. Although it seems that cinnamon also contributed to growth (+1,193 tonnes for HS code 09061900), 2 other cinnamon codes in the top 10 registered large declines (-826 and -566 tonnes respectively).

Imports of thyme are the most diversified, with the largest supplying country – Egypt – accounting for 'only' 52% of the CBI countries total. This means that, while there is – of course – already competition in terms of supplying countries, there might be good opportunities for new supplying countries too.

Note that for some products, there is strong competition from East European countries. For coriander seeds there is strong competition from Russia and from the European countries Poland and Romania (note: not included in the table below). Thyme predominantly comes from Poland while also Spain is an important supplier of this herb.

Table 7: European import volumes (tonnes) from CBI countries by top 10 products, including leading suppliers and shares.

Product	Import Volume 2020 from CBI countries	Absolute growth '16-'20	#1 supplier and share	#2 supplier and share	#3 supplier and share	#4 supplier and share	#5 supplier and share	#6 supplier and share	#7 supplier and share
09061900 Cinnamon and cinnamon-tree flowers	5,465	1,193	Indonesia (97.2%)	Sri Lanka (2.7%)					
09041100 Pepper of the genus Piper, unprocessed	5,327	-3,796	Indonesia (82.2%)	Sri Lanka (17.2%)	Côte d'Ivoire (0.1%)	Lebanon (0.1%)	Egypt (0.1%)	Nigeria (0.1%)	
09101100 Ginger, unprocessed	2,982	-221	Nigeria (92.1%)	Uganda (2.9%)	Indonesia (2.4%)	Ghana (1%)	Burkina Faso (0.7%)	Côte d'Ivoire (0.6%)	Sri Lanka (0.2%)
09101200 Ginger, processed	2,493	315	Nigeria (81.7%)	Côte d'Ivoire (11.4%)	Burkina Faso (3.7%)	Indonesia (2%)	Sri Lanka (0.9%)	Myanmar (0.1%)	
09081200 Nutmeg, processed	2,069	742	Indonesia (95.8%)	Sri Lanka (4.1%)	Lebanon (0.1%)				
09062000 Crushed or ground cinnamon and cinnamon-tree flowers	1,954	-826	Indonesia (88.7%)	Sri Lanka (10.9%)	Egypt (0.2%)	Lebanon (0.1%)			
09081100 Nutmeg, unprocessed	1,900	-111	Indonesia (97.0%)	Sri Lanka (3%)					
09061100 Cinnamon "Cinnamomum zeylanicum Blume" unprocessed	1,286	-566	Indonesia (51.3%)	Sri Lanka (48%)	Lebanon (0.6%)				
09109933 Thyme (excl. processed and wild thyme)	1,236	119	Egypt (51.6%)	Morocco (33.6%)	Kenya (7.4%)	Jordan (4.1%)	Lebanon (1.6%)	Ethiopia (1%)	Bangladesh (0.3%)
09092100 Coriander seeds, unprocessed	1,115	5	Morocco (87%)	Egypt (12.1%)	Jordan (0.6%)	Lebanon (0.2%)	Bangladesh (0.1%)		

Source: Eurostat (2021)



Top 11-23 products – imports between 200 and 1,000 tonnes

In the group of products that are good for between 200 to 1,000 tonnes of EU imports (Table 8), the following products substantially contributed to overall growth:

- Capsicum, processed;
- Mace, processed;
- Fenugreek seed;
- Cloves, unprocessed;

Also curcuma and curry have performed strongly, which can be concluded from the absolute growth figures in below table.

Several products show quite a diversified supply, with the top 4 being:

- Processed spices, with 7 supplying countries each with more than 3% share and the large supplying country, Egypt, only supplying 30.6% of European imports from the CBI country selection.
- Unprocessed capsicum with the largest supplying country, Uganda, only supplying 36.1% of the total, and 7 supplying countries each with more than 1% share of European imports from the CBI country selection. Also processed capsicum has a diversified supply with 7 supplying countries each with more than 2.4% share.
- Curcuma with 7 countries each more than 2.1% share.

While there is (of course) competition in terms of supplying countries for these spices, there might be good opportunities for new supplying countries too.

Table 8: European import volumes (tonnes) from CBI countries by top 11-23 products, including leading suppliers and shares.

Product	Import Volume 2020 from DCs	Absolute growth '16-'20	#1 supplier and share	#2 supplier and share	#3 supplier and share	#4 supplier and share	#5 supplier and share	#6 supplier and share	#7 supplier and share
09109991 Spices, unprocessed	998	-1,681	Egypt (81.9%)	Tunisia (6.3%)	Indonesia (3.4%)	Jordan (2.4%)	Morocco (2.1%)	Côte d'Ivoire (1.6%)	Nigeria (0.9%)
09109999 Spices, processed	834	-379	Egypt (30.6%)	Lebanon (18.9%)	Morocco (14.1%)	Indonesia (8.1%)	Sri Lanka (7.2%)	Jordan (5.9%)	Senegal (3.9%)
09042200 Fruits of the genus Capsicum or of the genus Pimenta, processed	810	205	Tunisia (64.1%)	Egypt (11.1%)	Senegal (5.7%)	Morocco (4.5%)	Sri Lanka (4.1%)	Côte d'Ivoire (2.9%)	Bangladesh (2.4%)
09071000 Cloves, whole fruit, cloves and stems, unprocessed	657	121	Indonesia (65.9%)	Sri Lanka (33.8%)	Lebanon (0.2%)				
09041200 Pepper of the genus Piper, processed	622	-173	Indonesia (82.2%)	Sri Lanka (10.4%)	Egypt (4%)	Lebanon (0.8%)	Côte d'Ivoire (0.6%)	Nigeria (0.5%)	Ethiopia (0.5%)
09042190 Dried fruit of genus Capsicum or Pimenta, unprocessed (excl. sweet peppers)	506	-75	Uganda (36.1%)	Nigeria (20.6%)	Kenya (20.3%)	Senegal (17.1%)	Sri Lanka (2.3%)	Indonesia (1.3%)	Tunisia (1%)
09082200 Mace, processed	466	197	Indonesia (96.4%)	Sri Lanka (3.6%)					
09109190 Crushed or ground mixtures of different types of spices	289	-154	Lebanon (66.7%)	Egypt (7.4%)	Bangladesh (6%)	Sri Lanka (5.5%)	Jordan (5.1%)	Nigeria (3.2%)	Morocco (1.4%)
09109910 Fenugreek seed	284	122	Egypt (52.8%)	Tunisia (32.8%)	Morocco (9%)	Jordan (1.9%)	Côte d'Ivoire (1.4%)	Indonesia (1%)	Lebanon (0.6%)
09109939 Crushed or ground thyme	274	-240	Lebanon (38.6%)	Jordan (27.9%)	Egypt (21.4%)	Morocco (11.6%)	Nigeria (0.4%)	Uganda (0.1%)	
09082100 Mace, unprocessed	269	-181	Indonesia (88.4%)	Sri Lanka (11.6%)					
09109105 Curry	227	41	Sri Lanka (93.7%)	Bangladesh (3.9%)	Lebanon (1%)	Nigeria (0.7%)	Egypt (0.7%)	Uganda (0.1%)	
09103000 Turmeric "curcuma"	215	56	Myanmar (41%)	Bangladesh (20%)	Nigeria (13.3%)	Indonesia (9.9%)	Sri Lanka (8.6%)	Uganda (2.6%)	Lebanon (2.1%)

Source: Eurostat (2021)



Top 24-35 products – less than 200 tonnes of EU imports

Details for the group of products with less than 200 tonnes of European imports are shown in Table 9. One product in the table stands out in terms of absolute decline: unprocessed vanilla. At the other hand, the strongest contributors to growth were processed cloves, unprocessed dried sweet peppers, processed coriander seeds and bay leaves. Products with a relatively diversified supply are bay leaves, spice mixtures, unprocessed wild thyme and processed coriander seeds.

Table 9: European import volumes (tonnes) from CBI countries by top 24-35 products, including leading suppliers and shares.

Product	Import Volume 2020 from DCs	Absolute growth '16-'20	#1 supplier and share	#2 supplier and share	#3 supplier and share	#4 supplier and share	#5 supplier and share	#6 supplier and share	#7 supplier and share
09092200 Coriander seeds, processed	152	22	Morocco (58.1%)	Bangladesh (17.4%)	Egypt (14.7%)	Sri Lanka (4.8%)	Lebanon (4.3%)	Jordan (0.4%)	Tunisia (0.1%)
09072000 Cloves, whole fruit, cloves and stems, processed	91	59	Indonesia (67.7%)	Sri Lanka (32.1%)	Lebanon (0.1%)	Ghana (0.1%)			
09042110 Dried sweet peppers unprocessed	72	47	Uganda (64.7%)	Morocco (27.5%)	Egypt (5.4%)	Nigeria (1.6%)	Ghana (0.6%)	Côte d'Ivoire (0.1%)	
09109950 Bay leaves	67	21	Morocco (39.1%)	Bangladesh (28.5%)	Egypt (13.8%)	Tunisia (11%)	Lebanon (4.9%)	Indonesia (2.3%)	Jordan (0.2%)
09109931 Wild thyme "Thymus serpyllum" unprocessed	52	-11	Egypt (52.3%)	Tunisia (34.2%)	Morocco (5.7%)	Lebanon (4.9%)	Jordan (1.9%)	Ethiopia (0.7%)	Kenya (0.5%)
09051000 Vanilla, unprocessed	50	-60	Indonesia (84.6%)	Uganda (12.8%)	Morocco (1.5%)	Côte d'Ivoire (0.6%)	Senegal (0.2%)	Sri Lanka (0.2%)	Kenya (0.1%)
09109110 Mixtures of different types of spices unprocessed	24	14	Egypt (43.6%)	Bangladesh (19%)	Indonesia (12.7%)	Lebanon (12.7%)	Senegal (8.7%)	Côte d'Ivoire (2.3%)	Jordan (0.5%)
09052000 Vanilla, processed	15	10	Morocco (52.8%)	Indonesia (42.9%)	Uganda (4.4%)				
09083200 Cardamoms, processed	12	8	Lebanon (77.5%)	Bangladesh (6.7%)	Sri Lanka (6.6%)	Ethiopia (6.1%)	Jordan (1.5%)	Egypt (1.2%)	Morocco (0.3%)
09083100 Cardamoms, unprocessed	11	-5	Lebanon (82.9%)	Senegal (8.9%)	Sri Lanka (4.1%)	Egypt (1.8%)	Jordan (1.8%)	Ethiopia (0.3%)	Bangladesh (0.1%)
09102010 Saffron unprocessed	1	-9	Morocco (94.1%)	Lebanon (3.7%)	Sri Lanka (2.1%)				

Source: Eurostat (2021)

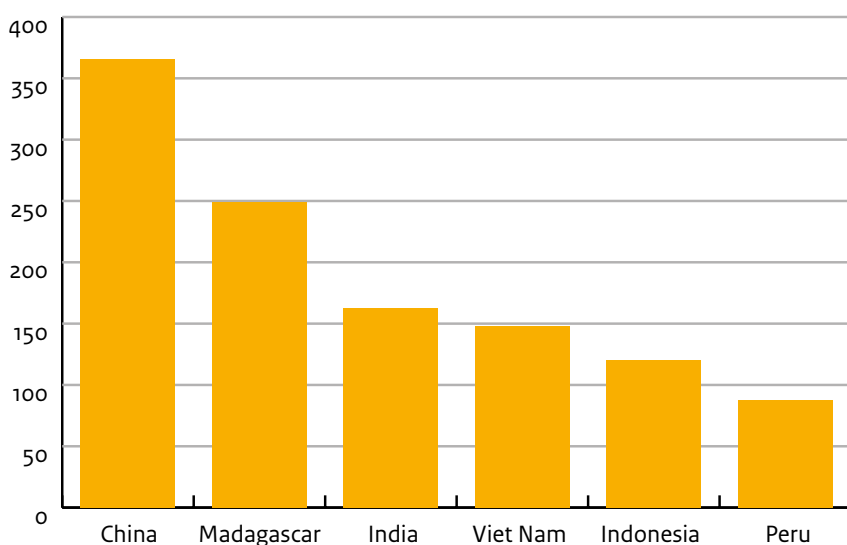


Competition in spices and herbs sector

In terms of value, Madagascar was the largest supplier of herbs and spices to the EU market in the 2015–2018 period, followed by China at quite some distance. However, Madagascar's exports faced a strong decline in value in 2019 because of the sharp drop in vanilla prices. Madagascar exports' high value in the previous years was because

vanilla is an expensive spice. However, in terms of volume, Madagascar is only a small to medium-sized exporting country. Most striking as compared to 2019 is the growth of imports coming from China. But China was not the exception; India, Vietnam, and Peru also booked a strong growth in exports to Europe.

Figure 2: Leading suppliers of herbs and spices to Europe 2020, in € million



Source: Eurostat (2021)

A closer look at supply from developing countries shows a changing picture in the last decade. Most striking is that before 2012, Madagascar did not hold an impressive stake of European imports. At that time, natural vanilla had been replaced by artificial flavourings to a large extent. The leading suppliers to Europe were Vietnam, China, Iran (for its saffron), India and Indonesia, while Peru was not even in the top seven yet.