



Annex – Spices and herbs import trends in Europe

This section contains a further analysis of European imports of spices and herbs 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 section's focus 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.
- Volume shares of individual supplying countries are roughly in line with value shares; differences are negligible.

Top 6 products – between 1,000 and 10,000 tonnes

The table below gives the details for the 6 products that all reach an EU import volume of more than 10,000 tonnes. Within this top 6, unprocessed ginger contributed to the growth of EU imports the most, at quite some distance followed by unprocessed pepper, dried fruit of the genus capsicum/pimenta, and curcuma. Only processed pepper experienced a decline in imports from developing countries, but because of higher prices in 2019 this was a less drastic drop in value terms.

Imports of unprocessed pepper of the genus piper are the most diversified, with the largest supplying country, Vietnam, accounting for only 42% 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.

Table 1: European import volumes (tonnes) from developing countries by top 6 products, including leading suppliers and shares (suppliers from other regions are underlined; the accessory share represents their share in EU imports).

Product	HS code	Import Volume 2019 from DCs	Absolute growth '15-'19	#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
ginger, unprocessed (note that a large share is fresh ginger)	09101100	122,826	37,461	China (75%, a lot is fresh)	Brazil (10%, all is fresh)	Peru (8%, a lot is fresh)	Nigeria (3%)	Thailand (2%)		
pepper of the genus piper, unprocessed	09041100	62,390	10,518	Vietnam (42%)	Brazil (35%)	Indonesia (9%)	India (5%)	Ecuador (2%)	Sri Lanka (2%)	China (1%)
dried fruit of genus capsicum or pimenta, unprocessed (excl. sweet peppers)	09042190	44,851	4,821	China (73%)	Peru (16%)	Mexico (6%)	India (1%)	Honduras (1%)		
fruits of the genus capsicum or of the genus pimenta, processed	09042200	43,738	10,500	China (64%)	India (18%)	Thailand (9%)	Hungary (4%)	Turkey (4%)	Tunisia (2%)	Peru (1%)
turmeric "curcuma"	09103000	22,682	10,399	India (87%)	Peru (6%)	Madagascar (1%)	Thailand (1%)	China (1%)	Indonesia (1%)	Vietnam (1%)
pepper of the genus piper, processed	09041200	12,933	-264	Vietnam (71%)	India (17%)	Indonesia (5%)	Brazil (2%)	China (1%)	Turkey (1%)	Sri Lanka (1%)

Source: Eurostat (2020).



Within the top 6 products both ginger and turmeric on average show double digit growth over the last 5 years for imports into Europe.

Table 2: European import volumes (tonnes), total and from developing countries by top 6 products, including share from developing countries, 2019, and annual growth rates in 2015-2019.

Product	HS code	Total import volume 2019	Import volume from	Import share from developing countries 2019	Total annual import growth rate 2015–2019 in value	Annual import growth rate from developing countries 2015–2019
ginger, unprocessed (note that a large share is fresh ginger)	09101100	171,532	122,826	71.6%	10.1%	9.5%
pepper of the genus piper, unprocessed	09041100	81,012	62,390	77.0%	4.3%	4.7%
dried fruit of genus capsicum or pimenta, unprocessed (excl. sweet peppers)	09042190	48,214	44,851	93.0%	2.3%	2.9%
fruits of the genus capsicum or of the genus pimenta, processed	09042200	86,765	43,738	50.4%	6.4%	7.1%
turmeric "curcuma"	09103000	27,852	22,682	81.4%	14.0%	16.6%
pepper of the genus piper, processed	09041200	32,374	12,933	39.9%	-0.9%	-0.5%

Source: Eurostat (2020).

Top 7-25 products – 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:

1. Ginger, processed,
2. Cinnamon, processed.
3. Spices, processed.

Also curry, coriander seeds, mixtures, processed nutmeg, and cardamoms have performed strongly, which can be concluded from the absolute growth figures in table 3.

Several spices show a more diversified supply:

1. Unprocessed spices with 7 supplying countries each with more than 5% share (note that this is an undefined category meaning that the large number of supplying countries does not say as much).
2. Processed cinnamon with 6 supplying countries each with more than 5% share.
3. Processed spices with 7 supplying countries each with more than 2% share.

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

Other products worth mentioning as they also contributed to growth are coriander seeds, mixtures of spices, cardamom, nutmeg and thyme. 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). Spice mixtures only come from 4 developing countries. Thyme predominantly comes from Poland and also Spain is an important supplier of this herb (note: both countries are not included in the table on the next page).



Table 3: European import volumes (tonnes) from developing countries by top 7-25 products, including leading suppliers and shares (suppliers from other regions are underlined; the accessory share represents their share in EU imports).

Product	HS code	Import Volume 2019 from DCs	Absolute growth '15-'19	#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
dried sweet peppers (excl. processed)	09042110	9,822	359	China (53%)	Brazil (15%)	Peru (11%)	Serbia (6%)	Zimbabwe (3%)	Uzbekistan (2%)	India (1%)
ginger, processed	09101200	9,280	3,648	China (47%)	Nigeria (24%)	India (15%)	Vietnam (4%)	Pakistan (3%)	Peru (1%)	Thailand (1%)
cinnamon and cinnamon-tree flowers	09061900	6,107	-542	Indonesia (52%)	Vietnam (17%)	Madagascar (14%)	Sri Lanka (8%)	China (7%)		
spices, unprocessed	09109991	6,857	-903	Thailand (26%)	India (13%)	Turkey (9%)	Egypt (9%)	Brazil (8%)	Vietnam (6%)	Syria (5%)
processed cinnamon and cinnamon-tree flowers	09062000	5,721	1,143	Indonesia (36%)	Vietnam (31%)	India (12%)	China (10%)	Sri Lanka (5%)	Madagascar (5%)	
spices, processed	09109999	6,007	1,070	Turkey (40%)	India (16%)	Egypt (9%)	South Africa (8%)	China (5%)	Pakistan (4%)	Lebanon (2%)
coriander seeds, unprocessed	09092100	5,122	-1,210	Russia (69%)	India (28%)	Ukraine (26%)	Bulgaria (24%)	Morocco (21%)	Romania (7%)	Syria (4%)
curry	09109105	4,613	663	India (80%)	Sri Lanka (9%)	Pakistan (5%)	UAE (3%)	Malaysia (1%)	Lebanon (1%)	
cinnamon "cinnamomum zeylanicum blume" (excl. crushed and ground)	09061100	3,784	-289	Madagascar (28%)	Indonesia (25%)	Sri Lanka (20%)	China (11%)	Vietnam (8%)	India (1%)	
fenugreek seed	09109910	3,377	155	India (90%)	Tunisia (3%)	Egypt (2%)	Thailand (2%)	Turkey (1%)	Pakistan (1%)	
coriander seeds, processed	09092200	2,848	558	India (78%)	Russia (25%)	Turkey (7%)	Morocco (6%)	Vietnam (5%)		
processed mixtures of different types of spices	09109190	2,148	478	Pakistan (28%)	Turkey (18%)	India (12%)	Lebanon (8%)	China (6%)		
nutmeg, unprocessed	09081100	2,640	179	Indonesia (82%)	Grenada (12%)	Sri Lanka (3%)	India (1%)	Costa Rica (1%)		
cardamoms, unprocessed	09083100	2,353	440	Guatemala (86%)	India (8%)	Honduras (2%)	Vietnam (1%)			
bay leaves	09109950	2,155	210	Turkey (91%)	Romania (4%)	Georgia (3%)	India (1%)			
nutmeg, processed	09081200	2,245	474	Indonesia (87%)	Vietnam (9%)	India (2%)	Sri Lanka (2%)			
cloves, whole fruit, cloves and stems, unprocessed	09071000	1,665	-193	Madagascar (36%)	Indonesia (34%)	Sri Lanka (24%)	Tanzania (3%)	India (2%)	Brazil (1%)	
thyme (excl. processed and wild thyme)	09109933	1,604	253	Morocco (37%)	Egypt (24%)	Israel (15%)	Turkey (12%)	Kenya (11%)	Jordan (4%)	Albania (3%) / Lebanon 2% / India 1%
processed thyme	09109939	1,059	73	Turkey (27%)	Egypt (17%)	Syria (14%)	Morocco (9%)	Albania (8%)	Lebanon (8%)	Jordan (7%)

Source: Eurostat (2020).



For the second group of products both processed ginger, and processed coriander seeds, on average show double digit growth over the last 5 years for imports into Europe.

Table 4: European import volumes (tonnes), total and from developing countries by top 7-25 products, including share from developing countries, 2019, and annual growth rates in 2015-2019.

Product	HS code	Total import volume 2019	Import volume from	Import share from developing countries 2019	Total annual import growth rate 2015-2019 in value	Annual import growth rate from developing countries 2015-2019
dried sweet peppers (excl. processed)	09042110	13,248	9,822	74.1%	-0.6%	0.9%
ginger, processed	09101200	14,926	9,280	62.2%	12.2%	13.3%
cinnamon and cinnamon-tree flowers	09061900	17,516	6,857	39.1%	4.5%	-3.0%
spices, unprocessed	09109991	7,527	6,107	81.1%	-0.4%	-2.1%
processed cinnamon and cinnamon-tree flowers	09062000	37,323	6,007	16.1%	7.8%	5.0%
spices, processed	09109999	12,090	5,721	47.3%	6.0%	5.7%
coriander seeds, unprocessed	09092100	13,785	5,122	37.2%	-4.2%	-5.2%
curry	09109105	8,135	4,613	56.7%	6.0%	4.0%
cinnamon "cinnamomum zeylanicum blume" (excl. crushed and ground)	09061100	4,880	3,784	77.5%	-2.7%	-1.8%
fenugreek seed	09109910	4,179	3,377	80.8%	2.4%	1.2%
coriander seeds, processed	09092200	6,569	2,848	43.4%	10.9%	5.6%
processed mixtures of different types of spices	09109190	3,868	2,640	68.2%	4.2%	1.8%
nutmeg, unprocessed	09081100	3,170	2,353	74.2%	8.3%	5.3%
cardamoms, unprocessed	09083100	4,201	2,245	53.5%	3.6%	6.1%
bay leaves	09109950	3,183	2,155	67.7%	4.3%	2.6%
nutmeg, processed	09081200	49,349	2,148	4.4%	6.4%	6.5%
cloves, whole fruit, cloves and stems, unprocessed	09071000	3,109	1,665	53.5%	-0.7%	-2.7%
thyme (excl. processed and wild thyme)	09109933	5,238	1,604	30.6%	0.8%	4.4%
processed thyme	09109939	2,459	1,059	43.1%	3.6%	1.8%

Source: Eurostat (2020).



Top 26 -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 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 spice mixtures and processed vanilla. Five developing countries supplied spice mixtures to Europe, with India and China together good for almost 75% of European imports.

Table 5: European import volumes (tonnes) from developing countries by top 26-35 products, including leading suppliers and shares (suppliers from other regions are underlined; the accessory share represents their share in EU imports).

Product	HS code	Import Volume 2019 from DCs	Absolute growth '15-'19	#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
vanilla, unprocessed	09051000	808	-938	Madagascar (77%)	Papua New Guinea (6%)	Indonesia (5%)	Uganda (2%)	India (1%)	French Polynesia (1%)	Mauritius (1%)
saffron (excl. processed)	09102010	414	52	China (73%)	Iran (16%)	Afghanistan (1%)				
mace, unprocessed	09082100	456	-27	Indonesia (91%)	Sri Lanka (5%)	Grenada (3%)	Vietnam (1%)			
mace, processed	09082200	510	28	Indonesia (78%)	Vietnam (21%)	Sri Lanka (1%)				
mixtures of different types of spices (excl. processed)	09109110	406	137	India (46%)	China (28%)	South Africa (4%)	Lebanon (2%)	Pakistan (1%)		
vanilla, processed	09052000	179	60	Madagascar (70%)	Czech Republic (12%)	India (4%)	Lithuania (3%)	Indonesia (2%)	South Africa (2%)	Lebanon (1%)
cloves, whole fruit, cloves and stems, processed	09072000	220	31	Vietnam (39%)	Indonesia (27%)	Sri Lanka (24%)	India (6%)	Estonia (4%)	China (2%)	
wild thyme "thymus serpyllum" (excl. processed)	09109931	131	19	Albania (24%)	Bulgaria (22%)	Morocco (17%)	Egypt (15%)	Israel (7%)	Turkey (4%)	Jordan (1%)
cardamoms, processed	09083200	60	9	Guatemala (37%)	India (33%)	Estonia (31%)	Indonesia (10%)	Turkey (7%)		
processed saffron	09102090	13	5	China (44%)	India (26%)	Iran (17%)	Turkey (2%)	Morocco (2%)	Afghanistan (1%)	

Source: Eurostat (2020).



For this last group of products cloves, cardamoms, and processed saffron show on average double digit growth over the last 5 years for imports into Europe.

Table 6: European import volumes (tonnes), total and from developing countries by top 26-35 products, including share from developing countries, 2019, and annual growth rates in 2015-2019.

Product	HS code	Total import volume 2019	Import volume from	Import share from developing countries 2019	Total annual import growth rate 2015-2019 in value	Annual import growth rate from developing countries 2015-2019
vanilla, unprocessed	09051000	1,361	808	59.4%	-18.3%	-17.5%
saffron (excl. processed)	09102010	812	510	62.8%	3.0%	1.4%
mace, unprocessed	09082100	588	456	77.6%	-3.1%	-1.4%
mace, processed	09082200	775	414	53.4%	-9.2%	3.4%
mixtures of different types of spices (excl. processed)	09109110	6,085	406	6.7%	4.6%	10.9%
vanilla, processed	09052000	718	220	30.7%	7.7%	3.8%
cloves, whole fruit, cloves and stems, processed	09072000	1,842	179	9.7%	16.6%	10.7%
wild thyme "thymus serpyllum" (excl. processed)	09109931	715	131	18.4%	1.0%	4.0%
cardamoms, processed	09083200	627	60	9.6%	17.4%	4.2%
processed saffron	09102090	1,540	13	0.8%	22.2%	-11.6%

Source: Eurostat (2020).