



CBI  
*Ministry of Foreign Affairs*

# **CBI Product Factsheet:**

## **Fresh herbs in Europe**

## Introduction

The European demand for fresh herbs is increasing. Fresh herbs such as basil, chives and mint thrive with the consumer trend of buying natural and the appreciation of culinary experiences. Opportunities for producers and exporters in developing countries are most prominent during the off season. However, suppliers are expected to maintain excellent product quality and high standard packaging.

## Product description

Fresh herbs (Herbaceous plants) refer to leafy green parts of a plant that have a culinary use for flavouring, or in some cases a medicinal or non-food use.

Botanically a distinction is made between annual plants, biennial plants, perennial plants and scrubs. Typical fresh herbs that are used in Europe are, for example: basil (*Ocimum basilicum*), parsley (*Petroselinum crispum*), coriander (*Coriandrum sativum*), chive (*Allium schoenoprasum*), thyme (*Thymus vulgaris*), oregano (*Origanum vulgare*), rosemary (*Rosmarinus officinalis*), dill (*Anethum graveolens*) and mint (*Mentha*).

Fresh herbs are available as freshly cut and packaged herbs, frozen herbs and potted plants.

**Table 1: HS Code for fresh herbs**

Number	Product
07099990	Fresh or chilled vegetables n.e.s.
07094000	Fresh or chilled celery (excl. celeriac)
07039000	Leeks and other alliaceous vegetables, fresh or chilled (excl. onions, shallots and garlic) – e.g. chives

Source: Eurostat Comext.

## Product Specification

### Quality and size

For the marketing of fresh herbs in the EU the [General Marketing Standards of Regulation \(EC\) No. 543/2011](#) apply. There is no specific marketing standard for fresh herbs defined by the United Nations Economic Commission for Europe (UNECE). However, regular quality requirements should not be underestimated. The following organizations provide further information:

- The German Bundesanstalt für Landwirtschaft und Ernährung (BLE) published a document with the [Proceedings 30<sup>th</sup> Meeting on the general marketing standards of fresh herbs](#). This document includes examples of quality standards and labelling.
- The Israeli Plant Protection and Inspection Services (PPIS) published a presentation about the [Quality Inspection of Fresh Herbs for Export from Israel](#). Israel is one of the main suppliers to Europe and has much experience with quality requirements.

General marketing standards suggest that fresh herbs must be intact, sound and clean, and free of visible foreign matter, pests, external moisture and foreign smell or taste. The condition of the fresh herbs must be such as to enable them to withstand transportation and handling. Also avoid decay, bruising, blackening, yellowing, pesticide residue, uneven colour and the lack of leaves. Product uniformity is important.

### Packaging

It is recommendable to use protective packaging for fresh herbs. Fresh herbs can be packed as potted herbs as well as freshly cut herbs. Potted herbs are almost exclusively from local produce due to the presence of soil. A protective paper sheet on top will protect the leaves from scraping with the packaging and reduce the risk of external moisture. Freshly cut herbs are usually packed in plastic and shipped in carton boxes. During transport and storage, maintain a constant and optimal temperature for the type of herb.

Packaging requirements differ between customers and market segments. Take into account that freshly cut herbs are often packed for the retail directly after harvest.

More information:

- Food and Agriculture Organization (FAO) with a [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits and Vegetables \(CAC/RCP 44-1995\)](#) including guidelines for proper packaging and transport in order to deliver the products in good condition.

## Labelling

Consumer packaging labelling must comply with the rules and regulations applying to the European market. Labels cannot contain any toxic ink or glue. If the nature of the produce is not visible from the outside, the package must be labelled with the name of the product, the (optional) name of the variety and/or commercial name.

The following items should be on the label of (pre-packed) fresh fruits:

- the name under which the product is sold,
- the commercial identification: class, size (code), number of units, net weight,
- name and address of the producer,
- place/country of origin.

In addition, the label should include any certification logo (if applicable) and/or retailer logo (in the case of private label products). Listing ingredients is not mandatory for fresh fruit unless a container holds several different products, in which case a list of ingredients alongside quantities of each product should be included on the label.

For more information:

- Practical information about [food labelling in the EU Export Helpdesk](#).
- General information in the [Codex General Standard for the Labelling of Prepackaged Foods \(CODEX STAN 1-1985\)](#)
- Legal information as described in [EU Regulation No. 1169/2011](#) on the provision of food information to consumers, including labelling of pre-packaged food sold on the EU market.

## What is the demand for fresh herbs in Europe?

- General information and figures about production and trade developments in the European market for fresh fruit and vegetables are provided in the [CBI Trade Statistics for Fresh Fruit and Vegetables](#) on the [CBI Market Intelligence Platform](#). On this platform you can also find the [CBI Product factsheet culinary dried herbs to Europe](#).
- This section provides you with more detailed information about the production, trade and consumption of fresh herbs in Europe.
- There are no detailed statistics available on fresh herbs, which is why the information in this section provides you with more information on the production and trade based on industry reports.

## Import

- Most fresh herbs are categorized in the Harmonized System (HS) under the CN code 0709.99.90 "fresh or chilled vegetables, not elsewhere mentioned". The demand for this statistical group is increasing. European imports (intra-EU and extra-EU trade) with this code have increased from 485 thousand tonnes in 2012 to 510 thousand tonnes in 2014. The import share from developing countries is approaching a 60 thousand tonnes.
- The European import of fresh herbs from non-EU countries increases during winter. Kenya, Israel and Ethiopia are important suppliers from November to May. Morocco, Egypt and Turkey are also non-EU suppliers of fresh herbs. And even Colombian producers, which are also internationally recognized for their fresh flowers, have shown interest in the EU market for fresh herbs.
- However, during the summer there is an increasing competition from European suppliers such as Italy, Spain, and Greece as well as from protected horticulture in the Netherlands. This makes it very difficult for overseas suppliers to be on the European market all year round.
- Important EU importers of fresh herbs are the UK and Germany, mainly for their domestic markets, and the Netherlands as trade hub for fresh products. Western Europe is a stable market for fresh herbs with a growing demand over the past years. Eastern Europe is a more volatile market but suitable as spot market and less demanding in packaging standards.
- The most demanded fresh herbs in Europe are basil, chives, mint and parsley. They are available as freshly cut and as potted herbs. European buyers often combine the production in different regions in order to maintain a year-round supply.

### Tip:

- Ensure continuity towards buyers in terms of volume and quality. At the same time try to maintain a level of flexibility and avoid being dependent on a single buyer. Contracted production provides the most security.

## Production

- The main producers of fresh herbs that are relevant for the European market, are Italy and Israel. Spain is also developing their fresh herbs production and in the Netherlands a significant amount of fresh herbs is produced in protected horticulture, which provides a secure climate and excellent control of pests and residue levels.
- The production of fresh herbs is often very labour intensive and therefore expensive. This provides opportunities for developing countries that can compensate for expensive logistics with lower cost of production.

### Tips:

- Explore the opportunities of cooperation with seasonal producers in Europe, for example in Italy. They already have access to EU buyers and can assist with your supply during winter.
- As a producing exporter, always try to produce on the basis of established contracts.

## Consumption

Basil is the most popular culinary herb in Europe, making up between 60 and 75 percent of the total consumption of fresh herbs. The preferences of fresh herbs vary per country, but in general the leading varieties are basil and chives. Other popular herbs include mint, parsley, rosemary, sage, thyme, cilantro, oregano and dill.

## What trends offer opportunities on the European market for fresh herbs?

- [CBI Trend mapping](#) provides you with general trends in the European market for fresh fruits and vegetables. This section provides more details about specific trends in the market for fresh herbs.

**A shift to fresh:** Consumers in Europe have an increasing appreciation for fresh products. Fresh herbs are considered to be more natural (than dried or processed herbs) and provide more satisfaction. Often fresh is combined with convenience. Fresh herbs are packed in special packaging for an extended shelf life or they are sold frozen. Innovations in preservation and packaging will enhance the development of fresh herbs in Europe.

### Tip:

- Make sure that your (post-)harvest and cold chain are perfectly managed. This is crucial to reach the right quality that is expected by the European buyers.

**Taste and culinary experience:** There is also a growing interest in new culinary experiences. Taste and new varieties of taste makers are part of these experiences.

Consumers often get inspired by cooking programmes on television and online recipes. As a result consumers are open to try new products. This development provides opportunities for fresh herbs but also for new varieties. For example, wild rocket (rucola) and extra spicy rocket are new variations on regular salad rocket.

### Tip:

- Try to differentiate in taste and consumer experience and communicate the superior taste of your product.

**Organic increasingly important for fresh herbs:** Thanks to the increased attention to health and environment, there is also a growing interest in organically produced fruit and vegetables. For fresh herbs, an organic label has extra value because of its leafy nature. The demand for organic fresh herbs is growing, although not fully satisfied due to the difficulty of producing organic herbs.

### Tips:

- Read more about organic farming on the [Soil Association website](#).
- Find specialized importers that have experience with fresh organic leafy herbs and vegetables. Find organic partners through online databases such as [Organic-Bio](#).

**Grow your own:** Many European retailers have adopted potted herbs in their assortment to fulfil the interest of self-growing. A large group of consumers like to grow fresh herbs in or near their kitchen. It is a sustainable way of having access to fresh herbs, but consumers are also becoming more and more involved in the food chain. For non-European suppliers potted herbs is a major phytosanitary and logistical obstacle because of the additional soil and high freight costs.

**Growing interest in sustainable fruit and vegetables:** Consumption of fresh vegetables in Europe is developing towards a more sustainable approach to production and processing. Environmental and social issues are becoming more and more important. Social and environmental certification schemes include actions to strongly reduce and register the use of pesticides, take action on the safety of employees and/or even include price guarantees. Certification schemes that are in line with the [Global Social Compliance Program \(GSCP\)](#) will have a higher chance of being accepted by European supermarkets.

**Tip:**

- Check the [Global Social Compliance Program \(GSCP\)](#) website for more information about social and environmental conduct.

**Local for local:** Not only is the European production of fresh herbs increasing, supermarkets are also keen to purchase from local sources when available. Local for local is considered more sustainable thanks to less transport, but also fits in the promotion of local seasonal products and regional farming. For external, all year round suppliers to the EU, it will become difficult to maintain a market share during the summer. In order to manage their fixed costs they will have to find other markets of increase export prices during the European winter season.

**Tip:**

- Avoid full dependency on the European market and try to maximize your profit in the European winter season.

## What requirements should fresh herbs comply with to be allowed on the European market?

Buyer requirements can be divided into (1) musts, requirements you must meet in order to enter the market, such as legal requirements, (2) common requirements, which are those most of your competitors have already implemented, in other words, the ones you need to comply with in order to keep up with the market, and (3) niche market requirements for specific segments.

For general information see also the buyer requirements for fresh fruit and vegetables on the [CBI Market Intelligence Platform for fresh fruit and vegetables](#).

## Requirements you must meet

### Pesticides

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers. To avoid health and environmental damage, the EU has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed will be withdrawn from the EU market. Note that buyers in several Member States such as the UK, Germany, The Netherlands and Austria, use MRLs which are stricter than the MRLs laid down in EU legislation.

**Tips:**

- To find out the MRLs that are relevant for fresh herbs, use the EU [MRL database](#) in which all harmonised MRLs can be found. You can search on your product or pesticide used and the database shows the list of the MRLs associated to your product or pesticide. Read more about [MRLs in the EU Export Helpdesk](#).
- Reduce the amount of pesticides by applying [integrated pest management](#) (IPM) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.
- Check with your buyers if they have additional requirements on MRLs and pesticide use.

### Plant Health

Fruit and vegetables exported to the EU must comply with the EU legislation on plant health. The EU has laid down [phytosanitary requirements](#) to prevent introduction and spread of organisms harmful to plants and plant products in the EU. The requirements mainly imply that:

- Certain listed organisms are not allowed to be imported into the EU, unless specific circumstances apply. EU control measures are subject to change.

- Plants or plant products specified in Part B, Annex V of the Plant Health Directive [2000/29/EC](#) must be accompanied by a plant health certificate. A model phytosanitary certificate can be found through Annex VII of the Plant Health Directive.

**Tips:**

- Check with the relevant National Plant Protection Organisation (NPPO) or your EU importer what the requirements are for your product. Click [here](#) for a list of NPPOs
- Read more about [plant health in the EU Export Helpdesk](#).

## Contaminants

Contaminants are substances that have not been intentionally added to food, but which may be present as a result of the various stages of its production, packaging, transport or warehousing. To avoid negative impact on the quality of food and risks to human health, the EU has set limits for several contaminants.

**Tips:**

- Find the relevant contaminant levels in the annex of [Regulation \(EC\) 1881/2006](#). All contaminants are presented and maximum levels are provided per product or groups of products.
- Find out more about prevention and reduction of lead Contamination in the [Code of Practice](#) published by the Codex Alimentarius.
- Check the European Commission's factsheet on food contaminants "[Managing food contaminants: how the EU ensures that our food is safe](#)" and read more about [contaminants in the EU Export Helpdesk](#).

## Control of food imported to the EU

To ensure food safety and avoid environmental damage, the EU has restricted the use of certain chemicals in several Regulations and Directives. Your products will be subjected to official controls. These controls are carried out to ensure that all foods marketed in the EU market are safe, i.e. in compliance with the requirements applicable to them. There are three types of checks:

- Documentary checks
- Identity checks
- Physical checks

In the event of repeated non-compliance of specific products originating from particular countries, the EU can decide that controls will be carried out on an increased level or lay down emergency measures. Controls can be carried out at all stages of import and marketing in the EU. However, most checks are done at the points of entry in the EU.

Switzerland, Norway, Iceland and Liechtenstein are not EU members, but are part of the European Free Trade Association (EFTA). Their food laws are to a large extent identical with EU legislation. However, some aspects of legislation may differ. In Switzerland, import checks are the responsibility of the [Swiss Customs Administration](#) and the [Federal Office of Public Health](#).

**Tips:**

- Familiarise yourself with the procedures before planning your exports to the EU. Failure to follow the right procedures could cause decrease and delay of orders, increase costs and result in actions by EU enforcement authorities.
- Make sure that the accompanying documents correspond (from A-Z!) with the food products contained in the consignment.
- Read more about [health control in the EU Export Helpdesk](#).
- Consult the [EU Export Helpdesk](#) for a full list of requirements, selecting the product code for fresh herbs, for example: **0709.99.90**

## Common buyer requirements

### Certification as guarantee

As food safety is a top priority in all EU food sectors, you can expect most buyers to request extra guarantees from you in form of certification. [GlobalG.A.P.](#) is the most commonly requested food safety certification scheme, essential for exporting fresh herbs to the EU, especially via supermarkets. GLOBALG.A.P is a pre-farm-gate standard that covers the whole agricultural production process, from before the plant is in the ground to the non-processed product (processing not covered).

Examples of other food safety management systems that can be required are British Retail Consortium ([BRC](#)) and International Food Standard ([IFS](#)), [FSSC22000](#) or [SQF](#). These management systems are additional to GLOBALG.A.P. and are recognised by the [Global Food Safety Initiative \(GFSI\)](#).

#### Tips:

- Check which Food safety management systems are most commonly requested in your target market. Expect GLOBALG.A.P. to be one of them.
- Read more on the different Food Safety Management Systems at the [Standards Map](#).
- As food safety is a major issue; work proactively with buyers to improve food safety and be transparent and up-to-date with buyer requirements and regulations.

### Quality standards

The General EU Marketing Standards also apply to fresh herbs. EU buyers often require compliance with the standards of the United Nations Economic Commission for Europe ([UNECE](#)) or the [Codex Alimentarius Commission](#) (CAC). It should be noted that quality refers to both food safety and food quality.

#### Tip:

- Make sure you supply the quality as agreed in the product specifications.

## Niche markets: Organic and Fair trade requirements

### Organic, a growing niche market

An increasing number of EU consumers prefer food products that are produced and processed by natural methods. The market for organic fresh herbs is a relatively small, but with a growing demand and limited supply. In order to market organic products in the EU, you have to use organic production methods according to [EU legislation](#). Furthermore, you have to use these production methods for at least two years before you can market the fruits and vegetables as organic. In addition, you (or your EU importer) must apply for an import authorisation from EU organic control bodies. After being audited by an accredited certifier, you may put the EU organic logo on your products, as well as the logo of the standard holder (e.g. [Soil Association](#) (especially relevant in the UK) , [Naturland](#) (Germany) or [Bio Suisse](#) (Switzerland)). Some of these standards are slightly different, but they all comply with the EU legislation on organic production and labelling.

#### Tips:

- Implementing organic production and becoming certified can be expensive, so assess the market potential before making any investments.
- Consult the [Standards Map database](#) for the different organic certifications.
- For the export of organic fresh herbs into the European market, use a competent and specialised importer, who understands the market and knows the way into niche markets with their particular requirements.

### Fair and sustainable

A small, but growing, niche market is the market for fresh products produced with more attention for on the social and/or environmental conditions in the producing areas. For fresh herbs social compliance is important, although product quality is top priority.

Examples of social or sustainable labels for fresh fruit and vegetables are [Fairtrade](#) , [Fair for Life](#) and the [Rainforest Alliance Certification Scheme](#).

Importers can adopt initiatives which may impact you as a supplier. For example the [Ethical Trading Initiative](#) (ETI) in the UK, or the [Business Social Compliance Initiative](#) (BSCI) in North-Western Europe increase the importance of social compliance.

**Tips:**

- Check your company's current performances. For example by doing a self-assessment on the [BSCI website](#).
- Consult the [Standards Map database](#) for more information and for differences between fair trade labels.

## What competition do I face on the European fresh herb market?

For general information about market competitiveness for fresh fruit and vegetables you can have a look at the [Market Competitiveness information](#) available at the CBI market intelligence platform. The platform also provides the [Top tips for doing business with European buyers](#).

In this section market entry opportunities and barriers as well as competition on company and product level regarding fresh herbs are listed.

**Company competition:** Rivalry is fierce in the trade of fruit and vegetables, so suppliers of fresh produce to European retailers are not in a position to argue about the rules of the game. Supermarkets have a very strong position and the highest standards, especially in Northern Europe. There is a preference for long term partnerships, but buyers will switch to other suppliers if expectations are not met.

During the European summer it becomes nearly impossible for long distant suppliers to compete in the EU market of fresh herbs. During the winter there are better opportunities for quality producers in non-EU and developing countries.

**Market entry:** Entering the European market is a big hurdle for many companies because of certification and meeting both legal and non-legal requirements. Importers and retailers are used to high quality fresh herbs and are selective with their suppliers. In order to achieve a strong buyer relation, supplying top quality and/or product differentiation are a necessity.

**Product competition:** Although fresh herbs are much more perishable, they increasingly substitute dried herbs, especially as a culinary addition. Dried herbs are more convenient in everyday cooking. For specific recipes and ethnic dishes the taste of a specific herb is difficult to substitute.

**Tips:**

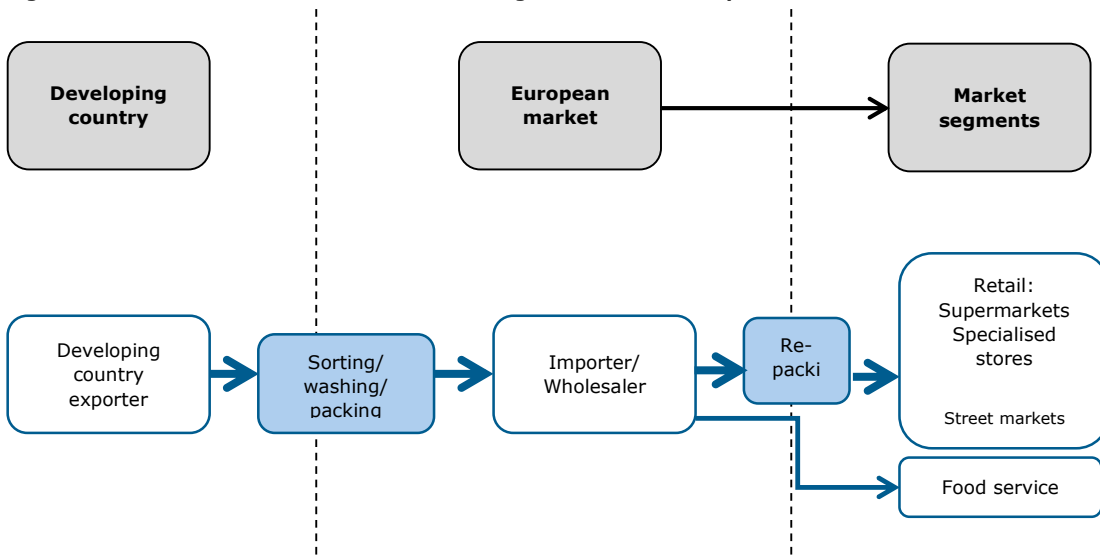
- Contact an experienced importer before entering the European market, especially when you are aiming for large retailers.
- Try not to compete on price alone, but build partnerships with buyers and strive for excellent product quality and handling.
- Establish a credible track record including transparent information on your company and product quality. Being part of a stable partnership and being a trustworthy supplier can help you to establish and maintain your position on the market.
- Use storytelling (e.g. show its origin and producer), novel packaging and premium quality as methods for setting your product apart.

## What do the trade channels and interesting market segments look like in Europe for fresh herbs?

For more general information about market channels and segments, you can have a look at the [Market Channels and Segments](#) section available at the CBI market intelligence platform. This section provides some information about the various marketing channels through which fresh fruit and vegetables are marketed in Europe.



**Figure 1: Market channels for Fresh Fruit and Vegetables in the European market**



### Interpretations and opportunities

Large supermarket chains are increasingly involved in sourcing activities, but most of the supply of fresh herbs from overseas is still handled by specialized importers.

Fresh potted herbs from local sources have been available for a long time in garden centres. Nowadays supermarkets sell the largest amounts of fresh herbs and garden centres only a small percentage. Street markets and specialized retail of fresh vegetables are also in the market for fresh herbs, but their market share is much smaller than that of the large retail chains, especially in northern Europe.

Importers/distributors differ in their relationship with the retail sector. Some are suppliers for private label products, others have their own brand, while others market the brand of a producer (cooperation).

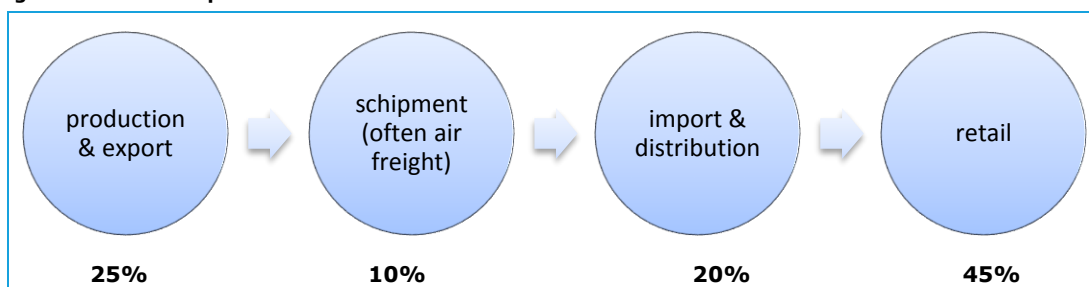
Wholesalers that supply the food service segment can be important for the introduction of new types of fresh herbs. Restaurants distinguish themselves with creativity and taste, and are therefore more receptive for experimenting with different flavours and herbs.

#### Tips:

- If your focus is the European market as a whole, find your importing partner in a main trade hub for fresh produce such as the Netherlands.
- Choose an import partner, based on the size of your company or marketing strategy.

### What are end market prices for fresh herbs?

**Figure 2: Consumer price breakdown of fresh herbs**



The consumer prices for fresh herbs are relatively stable. Potted herbs, such as basil or chives, are sold for around 2 euros. Most packaged freshly cut herbs are sold in small packages of 15 to 50g for around 1 to 2 euros.

**Tip:**

- For consumer prices you can check the online shops or assortments of supermarket chains such as [Tesco](#), [Albert Heijn](#) (search: 'verse kruiden') or [Carrefour](#) (search for 'herbes fraîches').

## Useful Sources

### Export and market entry support:

- CBI - <http://www.cbi.eu/>
- CBI information about EU Buyer Requirements - [http://www.cbi.eu/marketintel\\_platform/fresh-fruit-vegetables/136122/buyerrequirements](http://www.cbi.eu/marketintel_platform/fresh-fruit-vegetables/136122/buyerrequirements)
- EU Export Helpdesk - [http://exporthelp.europa.eu/thdapp/index\\_en.html](http://exporthelp.europa.eu/thdapp/index_en.html)
- SIPPO - <http://www.switzerland-ge.com/global/export/en/sippo-services>

### Certification schemes:

- British Retail Consortium (BRC) - <http://www.brcglobalstandards.com/>
- BSCI - <http://www.bsci-intl.org/>
- FAIRTRADE - <http://www.fairtrade.net/>
- GLOBALG.A.P - [http://www.globalgap.org/uk\\_en/](http://www.globalgap.org/uk_en/)
- ISEAL - <http://www.isealalliance.org/>
- ITC Standards Map - <http://www.standardsmap.org/>
- Rainforest Alliance - <http://www.rainforest-alliance.org/>

### Marketing and trade standards:

- Codex Alimentarius - <http://www.codexalimentarius.org/codex-home/en/>
- European Food legislation - [http://ec.europa.eu/agriculture/organic/eu-policy/legislation\\_en](http://ec.europa.eu/agriculture/organic/eu-policy/legislation_en)
- The United Nations Economic Commission for Europe - <http://www.unece.org/>

### Statistics and sector information:

- Agricultural Research for Development (CIRAD) - <http://www.cirad.fr/en>
- [Fruitrop](http://www.fruitrop.com) - <http://www.fruitrop.com> (publication of CIRAD)
- [Freshfel](http://www.freshfel.org) - <http://www.freshfel.org>
- [Freshplaza](http://www.freshplaza.com) - <http://www.freshplaza.com>
- European Statistics Eurostat - <http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home/>
- ITC Trade Map - <http://www.trademap.org/>
- FAOSTAT - <http://faostat.fao.org/>
- United Nations Comtrade - <http://comtrade.un.org/>



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December 2015