

What is the demand for spices and herbs on the European market?

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European imports of spices and herbs have been subject to various dynamics in the past few years. There is an increased interest in sustainably sourced spices, and related certification is becoming more important. Among the products in highest demand are dried chillies, ginger and pepper. Juniper berries and seeds of anise, badian, caraway, cinnamon and cardamom also offer good opportunities in the European market.

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1. What makes Europe an interesting market for spices and herbs?

Market size and dependence on external suppliers make Europe an attractive target market for suppliers from developing countries. The European countries that present the most opportunities overall are the Netherlands, Germany, Spain, the United Kingdom, Poland and France.

Europe's mature and large market offers stability for suppliers

Europe is a mature and diverse market for spices and herbs, home to two of the ten largest importing countries in the world. The overall demand in Europe is relatively stable, and volumes are large. With a population of almost 530 million consumers, Europe imports more spices and herbs than North and South America. Asia's spices and herbs imports represent a considerable share (45%) of the global market volume. This is because the total and per capita consumption of spices and herbs is much higher in Asia than in other regions. Most of the world's spices are produced and processed in tropical regions of Asia.

Source: [GloballyCool](#) based on UNComtrade, September 2024

Europe depends on imports from developing countries

Most of Europe's spice imports come from developing countries (all countries on the [OECD-DAC list](#)). This is different for herbs, as most herbs consumed in Europe are also produced within Europe. Figure 2 shows import volumes from developing countries peaking in 2021. This was mainly the result of record harvests of several spices and herbs that year. Europe imports about 490,000 tonnes of spices and herbs from developing countries every year. This is 16-18% of the global average annual volume of spices and herbs coming from developing countries. Europe is also an important destination for the more expensive spices and herbs. This is reflected in its higher (20-24%) share in global import value.

Source: [GloballyCool](#) based on UN Comtrade, September 2024

Over the 2019-2023 period, the import volume of spices and herbs grew at an average annual rate (CAGR) of +1.0%. Growth from developing countries was lower (+0.1%) and was highest for intra-European trade (+2.9%), while imports from the rest of the world (excluding developing countries) declined by -2.2%.

Most herbs consumed in Europe are locally produced

The dependence on imports from developing countries also means that, for most products, there is not much competition from European producers. There are however a few exceptions. Production of dried herbs (and a few spices) takes place in France, Italy, Greece, Bulgaria, Poland, Romania, Spain, Hungary and Germany. Parsley and basil are among the most popular dried herbs, but European production also includes bay leaves, celery leaves, chives, coriander leaves, dill tips, chervil, fennel, marjoram, oregano, rosemary, sage, savoury, tarragon and thyme.

Several of these herbs are used in the popular European 'Mediterranean herb' and 'herbs de Provence' spice mixes. The Mediterranean herb blend typically includes basil, oregano, thyme, rosemary and marjoram. Some variations also add sage, parsley and bay leaves. The herbs de Provence blend, which originates from the Provence region in France, traditionally includes thyme, rosemary, oregano, marjoram and savoury. More complex variations may add fennel, basil, tarragon and lavender.

Recent years seem to show a decline in herbs production in these European countries, but production is scattered across Europe and there is little sector-level data to prove this. However, if this is a trend and it continues and the lower domestic or regional supply is supplemented with imports, it could offer opportunities for developing country suppliers.

Forecast: volumes to remain stable

In the short to medium term, European import volumes will remain relatively stable, possibly with limited growth due to the role of spices and herbs as a replacement for salt and a flavour enhancer in plant-based products. This does not mean that fluctuations will not take place: import volumes often fluctuate due to non-stable production levels in the countries of origin.

Inflation is also influencing consumption of spices and herbs. In Europe, inflation was highest in 2022 (when food prices rose 8.4%) and 2023 (around 5.3%), and is expected to be considerably lower in 2024 and beyond (2.8% projected for 2024).

In previous years, high inflation affected higher-end markets most. For example, the organic food market shrank in several European countries due to high prices, driving consumers to switch to conventional food products. This also negatively affected the market for organic spices and herbs. Looking ahead, though economic conditions remain weak in some countries (such as Germany), lower inflation will create good conditions for demand for organic and other higher-valued spices and herbs.

Figure 3: Nutmeg in a Swiss mainstream supermarket



Source: [GloballyCool](#), July 2023

According to the [Harmonised index of consumer prices \(HICP\) in European Union \(EU\) markets](#), the index for salt, spices and culinary herbs was 134.21 points in August 2024 (EUROSTAT), compared to 115.18 points in October 2022. This means that consumer prices for these products went up by 16.5% in less than two years. Inflation peaked in the period of October 2022-December 2023. In 2024, inflation returned to substantially lower levels (around 2% on average).

European imports of spices and herbs are likely to increase moderately in the next years. After a slowdown in 2023, the EU economy is expected to grow by 1.0% in 2024 and a further 1.7-1.8% in 2025. Average inflation levels are predicted to drop to 2.7% in 2024 and 2.2% in 2025. Although the EU economy is forecast to pick up, growth rates are expected to remain lower than in South Asia and Southeast Asia, where economic and market growth have averaged much higher in the past decade.

European hubs will remain strong destinations

The most important ports for spices and herbs in Europe are Rotterdam (Netherlands), Hamburg (Germany), Antwerp (Belgium), Felixstowe (United Kingdom), Valencia (Spain) and Marseille (France). After products arrive at those ports they are unloaded and transported by truck to other parts of Europe. The Port of Rotterdam is the largest in Europe.

The main destinations of spices and herbs imports are forecast to remain the same in the years to come. This means that the Netherlands will keep its position as the largest hub for spice imports into Europe. Other hubs in Europe are Germany (especially for black pepper from Brazil), France (vanilla from Madagascar) and Spain (dried chillies and particular herbs used in processing).

Supply dynamics of single spices have a strong influence on imports

The average growth of the total market is greatly influenced by supply or market developments related to single spices. While this is impacting import values even more (because prices tend to fluctuate more than volumes), this also has an impact on the total import volume and its trajectory.

Figure 4 shows that several spices experienced a small decline in imports in 2022-2023 (in line with the consumption slowdown due to inflation pressure), but there are also spices that follow a different pattern. For example:

- Pepper: imports in 2022 dropped to levels lower than those of 2018, and plummeted further in 2023.

Basically, the main reason for the lower imports since 2022 is the difficult economic situation in Europe.

- Curcuma: imports peaked in 2020 and 2021 because of COVID-19, with curcuma being used massively as an immunity booster. In 2022, imports dropped below the 2018 import volume. 2023 showed a small recovery of 4.5%.
- Cumin: imports peaked in 2021 due to record harvests. Because of misharvests in 2022 and 2023 (mostly in Türkiye), imports dropped in both years to levels almost as low as those of 2019.
- Nutmeg: imports peaked in 2019 and 2022, with between 8-10% lower volumes imported in 2020, 2021 and 2023.
- Cloves, ginger and vanilla: imports reached record volumes in 2021 and 2022, but declined in 2023. Vanilla production is dominated by Madagascar, where supply dynamics caused European import volumes to drop strongly in 2023.

Also for the short-to-medium term, the expectation is that the supply volumes of certain spices will continue to show a dynamic pattern. Cumin and pepper are examples of such spices, with supply volumes strongly impacted by climate conditions in large supplying countries like India, Vietnam, Türkiye and Brazil.

Table 1: European import volumes from developing countries, by spice, by year and averaged, 2019-2023

	2019	2021	2023	CAGR '19-'23
Ginger	146.53	165.37	149.07	0.4%
Chillies and paprika	101.91	125.31	122.26	4.7%
Pepper	87.53	88.83	68.01	-6.1%
Curcuma	24.77	26.21	22.13	-2.8%
Cinnamon	18.70	20.39	18.06	-0.9%
Cumin	14.55	18.79	14.94	0.7%
Juniper berries and misc. seeds*	15.49	17.86	14.67	-1.3%
seeds of anise, badian, caraway or fennel				
Coriander (seeds)	8.78	10.59	8.87	0.3%
Spice mixes	8.03	10.13	8.44	1.3%
Nutmeg	5.56	4.87	5.06	-2.3%
Cloves	2.38	2.97	2.90	5.1%
Cardamom	3.21	4.13	2.77	-3.6%

Vanilla	1.18	1.66	1.27	1.9%
Mace	1.20	1.10	1.00	-4.4%
Saffron	0.09	0.14	0.14	9.5%
Other spices and herbs	22.71	28.93	24.45	1.9%

Source: [GloballyCool](#) based on UNComtrade, September 2024

*Juniper berries and seeds of anise, badian, caraway or fennel

Import of ground spices grows much faster than unground spices

There is a clear trend towards importing ground spices from developing countries. Although import volumes of ground spices (107,200 tonnes in 2023) are still much lower than of whole spices (301,700 tonnes), ground spices have grown at a much higher rate (+3.8% versus -1.1% per year on average).

Table 2a: European imports of whole spices from developing countries, in thousand tonnes, 2019-2023

	Volume 2023	Absolute growth '19-'23	CAGR '19-'23
Total	301.7	-13.1	-1.1%
Ginger	136.6	1.5	0.3%
Chillies and paprika	69.2	12.7	5.2%
Pepper	50.6	-21.6	-8.5%
Cinnamon	9.2	-1.9	-4.6%
Juniper berries and misc. seeds*	13.5	-0.7	-1.2%
Cumin	9.8	-1.0	-2.3%
Coriander (seeds)	4.5	-1.1	-5.3%
Nutmeg	2.1	-1.0	-9.2%
Cardamom	2.3	-0.6	-5.5%
Cloves	2.6	0.6	6.5%

Vanilla	1.1	0.1	3.6%
Mace	0.3	-0.3	-14.0%

Source: [GloballyCool](#), based on UNComtrade, September 2024

Table 2b: European imports of ground spices from developing countries, in thousand tonnes, 2019-2023

	Volume 2023	Absolute growth '19-'23	CAGR '19-'23
Total	107.2	15.0	3.8%
Ginger	12.5	1.0	2.1%
Chillies and paprika	53.1	7.7	4.0%
Pepper	17.4	2.0	3.2%
Cinnamon	8.8	1.3	4.0%
Juniper berries and misc. seeds*	1.2	-0.1	-2.6%
Cumin	5.2	1.3	7.8%
Coriander (seeds)	4.3	1.2	8.4%
Nutmeg	3.0	0.5	4.2%
Cardamom	0.5	0.1	10.2%
Cloves	0.3	-0.1	-3.8%
Vanilla	0.1	-0.1	-7.9%
Mace	0.7	0.1	2.0%

Source: [GloballyCool](#), based on UNComtrade, September 2024

The trend of rising exports of ground spices to Europe at the cost of whole spices is likely to continue in the short to medium term.

Tips:

See [what trends offer opportunities or pose threats on the European spices and herbs market](#).

Keep up with market developments, for example using [Nedspice Market Updates](#).

Above-average import growth for sustainably produced spices and herbs

The largest organic food markets in Europe are Germany, France, Italy and Switzerland, with estimated retail market values of €16, €14, €4.0 and €3.8 billion, respectively. As a percentage of the total market, organic food market volumes differ per country. In Germany, for example, this percentage is 4-5%.

Specific statistics for organic herbs and spices are not available, but the most traded and consumed herbs and spices – in first place pepper (black) and dried chilies, also ginger and curcuma – are also the most relevant in the organic market segment. In terms of share, organic black pepper is also the spice with the highest share of the total market, which is below 2-3% of total European imports.

The latest [report on imports of organic products to Europe](#) mentions spices, however spices are part of a large category (tropical fruit, nuts and spices), of which spices only take a very small share.

As an indication of the export potential to individual European countries, Figure 4 shows the number of organic-certified importers of processed agricultural products for use in food in the largest European markets. Note that the United Kingdom and Switzerland are not included in this database, as neither country is part of the EU. The two countries, especially Switzerland, are important markets for organic spices and herbs.

Source: [GloballyCool](#) based on EU Commission database, July 2023

A large number of organic-certified importers in a country indicates market opportunities for organic produce, since importers need to be certified for trading organic produce. Therefore, the best opportunities for organic produce exports are in the EU markets displayed in Figure 4.

In addition to organic-produced food, there is also growing consumer commitment to ethical and sustainably produced food. An important certification scheme with this focus is [Fairtrade](#). Other certification schemes are [Rainforest Alliance](#) and [BCorp](#). As the Fairtrade market is based on the certification scheme, traders can only trade Fairtrade-certified products if they have a certification too.

Source: [GloballyCool](#) based on Fairtrade database, July 2023

Whereas the segment of organic spices and herbs is already small, this is even more the case for Fairtrade-certified produce. The pioneer market for Fairtrade-certified products is the United Kingdom, while Switzerland too has developed into an important market.

One of the pioneering companies for Fairtrade-certified spices in the United Kingdom is [Steenbergs](#). One of the market leaders in the United Kingdom, [British Pepper and Spice](#), has also obtained a Fairtrade certificate. In Switzerland, two important Fairtrade-certified spices importers are [Pronatec](#) and [JC Fridlin](#). Important Fairtrade-certified companies in the Netherlands are the business-to-business cinnamon specialist [Royal Polak Spices](#) and the trading house [Catz](#).

Following Figure 5, Germany has the highest number of Fairtrade-certified traders (111), followed by France (88), the Netherlands and Switzerland (both with 52). Together with the United Kingdom (48) and Italy (38), these countries offer the most potential for exporters of Fairtrade-certified spices and herbs.

India has the largest number of Fairtrade-certified companies in the spices segment, while Egypt has the largest number in the herbs segment. Whereas the segment of organic spices and herbs is already small, the segment of Fairtrade-certified spices and herbs is even smaller (less than 0.5% of the total market volume).

The European market for Fairtrade-certified spices and herbs is expected to grow gradually over the next three to five years, influenced by the following trends and developments:

- Rising consumer awareness and demand for ethical products. This growing awareness, especially among younger consumers, is driving demand for Fairtrade products, including spices and herbs.
- Sustainability and traceability regulations: European Union regulations are increasingly focusing on sustainability, traceability and ethical sourcing. As these regulations tighten, manufacturers may turn to Fairtrade-certified sources to comply with new requirements and to appeal to consumers looking for responsibly sourced products.
- Retailers promoting Fairtrade: several major retailers in Europe (e.g. [Coop](#) in Switzerland, [Lidl](#) in Germany and several other countries, [REWE Group](#) in Germany) are gradually expanding their Fairtrade-certified product offerings in response to consumer demand. Increased shelf space and online visibility for Fairtrade spices and herbs could lead to greater awareness and sales.
- Growth in organic and health-conscious markets: the organic and health-conscious segments, while small, are growing in Europe. Consumers in these niches are often more willing to pay premiums for ethically and sustainably produced goods, which can benefit Fairtrade-certified spices and herbs.
- Education and marketing efforts: as the Fairtrade organisation and others continue to educate consumers about the benefits of Fairtrade-certified products, more people will purchase these products. Targeted marketing and certification visibility will be essential in expanding consumer awareness.

Supply chain challenges and potential higher costs for Fairtrade-certified spices could limit market growth, especially if inflation and economic uncertainty continue.

Tips:

Consider organic as a speciality. If your region is not suitable for organic production, focus on the cleanest produce possible and consider other sustainability standards.

Read about organic legislation in the [European buyer requirements for spices and herbs](#).

Read about developments in Fairtrade in the [Fairtrade Annual Report 2023](#).

Consider Fairtrade certification for your operations. Fairtrade certification is not just a certificate. It boosts an exporter's credibility, provides access to premium markets and ensures fair prices and ethical sourcing. Check here for [an example of a Fairtrade certificate for spices](#).

2. Which European markets offer the most opportunities for spices and herbs?

The main European markets for spices and herbs providing opportunities for exporters from developing countries are the Netherlands, Germany, Spain, the United Kingdom, Poland and France. These markets combine certain characteristics, mainly sizeable imports of spices and herbs from developing countries, total market size, and relevance of organic or Fairtrade market segments.

Each region has different supply profiles

You can group European countries into roughly four different regions: Western, Northern, Southern and Eastern Europe. Each region has a different profile if you look at their supplying regions. The most important characteristics and differences are:

- Western Europe accounts for almost half (48% in 2023) of Europe's spices and herbs imports from developing countries. It is home to the two top importing countries, the Netherlands and Germany, while France is another large market, followed by Austria in fourth place. Western Europe is the dominant destination region for spices and herbs from South America (Brazil and Peru) and Southeast Asia (Vietnam and Indonesia). It is also the main market for intra-European trade coming from Western and Southern Europe. Furthermore, the region is a top destination for spices and herbs from East Asia (predominantly ginger from China).
- Southern Europe is the second-largest market for spices and herbs, accounting for 25% of European imports from developing countries. Spain is the region's largest importing country, followed by Italy and Greece. The region stands out because of its large imports from East Asia, which is mainly dried chillies imported from China.
- Northern Europe accounts for 18% of Europe's imports from developing countries. The United Kingdom accounts for about two-thirds of the total market, followed by Sweden. This region stands out because of its relatively high imports from South Asia (dried chillies, cumin and curcuma from India).
- Eastern Europe takes 8% of European imports, with Poland accounting for over 50% of the region's imports from developing countries, followed by the Czech Republic and Bulgaria. Most of the region's imports, however come from the rest of Europe. Imports from outside Europe mostly come from East Asia (dried chillies and paprika, and ginger from China) and Southeast Asia (mainly pepper from Vietnam).

Europe's largest destinations for spices and herbs

Source: [GloballyCool](#) based on UNComtrade, September 2024

In 2023, Spain (Southern Europe) became the largest destination for spices and herbs from developing countries. The Netherlands, Germany and France (Western Europe), the United Kingdom (Northern Europe) and Poland (Eastern Europe) followed. Buyers in these leading markets have a lot of experience in importing spices and herbs from developing countries. For that reason, you can best focus on these countries.

Tips:

Study your options in Spain, the Netherlands, Germany, the United Kingdom, Poland and France. A good way to choose in these markets is to visit European trade fairs. Start with the leading fairs: [Anuga](#) in Cologne (Germany), [Sial](#) in Paris (France) and [Biofach](#) in Nuremberg (Germany). Another option is [Fi Europe](#) in Frankfurt (Germany), which is dedicated to food ingredients.

Diversify your markets and spread risks by focusing on at least a few countries from different regions.

Use our [tips for finding buyers](#) to learn how to find the right entry to the European market.

Find more information about the European spices industry on the [European Spices Association](#) website. You can also download the members list of all the national spices associations across Europe.

Spain: leading importer from developing countries

Spain is Europe's leading importer of spices and herbs from developing countries and also has the highest market share, with over 90% of all its spices and herbs imports sourced from developing countries (98,000 tonnes in 2023). Between 2019 and 2023, Spain's overall imports of spices and herbs increased at an average annual rate (CAGR) of 5.4%. Its imports from developing countries grew at a CAGR of 5.9%.

Table 3: Most important developing countries supplying Spain

Supplying country	Export volume (1,000 tonnes) in 2023
China	63
Zambia	8.5
Peru	8.1
Vietnam	3.7
India	2.8
Brazil	2.2
Syria	0.7

Source: [GloballyCool](#) based on UN Comtrade, September 2024

Spain mainly imports dried chillies and paprika, amounting to 74,000 tonnes in 2023 (+7.4% per year). It uses these products for the production of paprika (pimentón, often also known as ‘Spanish paprika’). Spain is Europe’s largest producer and processor of paprika and a range of dried paprika derivatives that are widely used as colouring and flavouring agents, for example in food preparations. Spain is also a leading European market for saffron. Paprika and saffron are key ingredients in Spain's main rice dish, paella, and many other culturally important recipes.

Spain's leading destinations for spices and herbs exports (mainly dried chillies and paprika) are the United Kingdom, Germany, France and the Netherlands. There are around 110 companies in Spain specialised in trading and manufacturing spices. The country has a very dynamic food industry, focused on formulations for food products, seasonings and spices.

The number of organic-certified importers of processed agricultural products for use in food in Spain is the third-highest in Europe. This looks promising, but it should be noted that this is a very broad category and not fully representative of the organic market opportunities in Spain. Spain is believed to be a smaller organic spice market than the United Kingdom, Germany, Switzerland and the Netherlands. One example of a Spanish organic-certified spice importer is [Sabatër](#).

Tip:

Check the [Association for Spice Processors and Packers \(AEC\)](#), consisting of around 20 members targeting the retail and food industries.

The Netherlands: European spice trade hub

In 2022, the Netherlands overtook Germany to become Europe's leading importer of spices and herbs. Its imports grew from 124,000 tonnes in 2019 to 133,000 tonnes in 2023, at a CAGR of 1.7%. About three-quarters of this came from developing countries, amounting to 94,000 tonnes in 2023. This makes the Netherlands Europe's second-largest importer of spices and herbs from developing countries.

China is the leading supplier of spices and herbs to the Netherlands. In 2023 it supplied 27,000 tonnes, or around 29% of these imports from developing countries. However, China's supplies have dropped at a CAGR of -12% since 2019. This offers opportunities for countries such as Brazil (18% share of Dutch spices and herbs imports) and Peru (17%), which followed in second and third place with strong CAGRs of +28% and +6.8%, respectively. Exports from Thailand, Vietnam and especially India also performed well, the latter with a CAGR of +20%.

Although the Netherlands has a relatively small domestic market, it is an important European trade hub and re-exports large quantities of spices and herbs. Its main European re-export destinations are Belgium, France and Germany.

Several Dutch importers and/or brokers are pure spice specialists, such as [Nedspice](#), [VanDerDoes Spicebrokers](#), [Keyzer & Company](#) (focused on Latin America), [SpiceRouteSourcing](#), [SpiceMasters](#), [Solina/Jadico](#) and the small trader [H.J. Albring](#). Others focus on imports of a single spice for a certain segment, such as [Royal Polak](#) with cinnamon for the bakery industry. There are also companies that trade in a wider range of ingredients, as [Catz](#) does with nuts, [DeMolukken](#) with grains and pulses and [Dutch Organics](#) and [Vehgro](#) with a range of organic products.

[Silvo](#) (part of the [McCormick group](#)), [Euroma](#) and [Verstegen](#) are among the top players in the Dutch retail market for spices and herbs. These companies also import directly from developing country suppliers.

The [Dutch Spice Association](#) strongly supports sustainable sourcing through the [Sustainable Spice Initiative](#) (SSI). The participating companies (mainly large spice companies in and outside Europe) all aim to grow the share of sustainably sourced products. The initiative recognises a [basket of sustainability standards](#) as meeting the minimum social, environmental and economic criteria to be considered sustainable. Most of its activities take place in India and other Asian countries, like Vietnam. Until now the project has mostly focused on pepper.

The Netherlands is a small but growing market for organic-certified spices and herbs. Most organic spices and herbs are used by the food and drinks processing industries. Only a small portion goes to consumer packaging for the food retail market and even less to the foodservice sector. Most organic spices and herbs in consumer packaging are sold in organic retail chains, such as [Odin](#) and [Ekoplaza](#). They are mostly sold as a standalone spice, but can also be found as ingredients in organic-certified spice mixes. Although volumes are still small, the growth is higher than that of the conventional spices and herbs market.

Tip:

Find Dutch prospects in the [list of Dutch companies trading spices](#) of the Dutch Spice Association.

Germany: largest domestic market for spices and herbs in Europe

With more than 83 million inhabitants, Germany is a strong market. Unlike the Netherlands, Germany imports

spices and herbs mainly for domestic use. In 2023 the country imported 124,000 tonnes of spices and herbs, 91,000 tonnes of which came from developing countries. Developing countries hold a fairly stable import market share of around 73%.

German imports of spices and herbs peaked in 2021 and have dropped every year since then, resulting in a 2019-2023 CAGR of -2.6% both for total imports and imports from developing countries. Nevertheless, some supplying countries have been able to maintain growth, particularly Peru. With a CAGR of 25%, Peru supplied 7,900 tonnes of spices and herbs (mainly ginger) to Germany in 2023.

Two countries experienced considerable declines in exports to Germany: Brazil (-14% CAGR) and Indonesia (-18% CAGR). Both declines were related to reductions in pepper exports. In the case of Brazil, production output was the same, but more pepper went to Vietnam. In the case of Indonesia, a downward trend in the planted area of white pepper caused the decline in exports.

Germany also imports considerable volumes of spices and herbs from the Netherlands and Spain. The Netherlands is also its main re-export destination. Most of the trade goes through the Port of Hamburg, which has world-class facilities for the transport and storage of spices.

Among the leading importers are large spice companies that are involved in grinding, packing and other processing. They include [Fuchs](#), [Husarich](#), [AKO The Spice Company](#), [Hamburger Gewürz-Mühle](#) and [ENES Gewürze](#). These companies have a strong presence in the German market and often import spices directly from developing countries.

Germany is also home to production units of large general food-processing companies, like [Nestlé](#), [Kraft Foods](#) and [Hela](#). Although they may import from developing countries directly in certain cases, they mainly buy from dedicated spices and herbs traders.

Germany and Switzerland are Europe's leading markets for organic-certified spices. Germany also has Europe's largest number of organic-certified importers of processed agricultural products for use in food. In Germany, these spices and herbs are sold mostly in organic retail chains like [Biomarkt](#), [DM](#) and [Alnatura](#). They are mainly sold in standalone form, but can also be found as ingredients in organic-certified spice mixes and prepared food products. Although volumes are still small, growth is higher than that of the conventional spices and herbs market.

Within Europe, Germany is a large market for Fairtrade products, although Fairtrade-certified spices are less commonly available than in Switzerland and the United Kingdom. [Weltpartner](#) is a key importer of Fairtrade products in Germany and sells several spices and herbs. Other companies trading Fairtrade-certified spices and herbs include [KarmaKollektiv GMBH](#) and [Soul Spice](#). Nevertheless, the share of Fairtrade-certified spices and herbs in the German market is small – even smaller than the organic market.

Tips:

Find German spice companies on the website of the [German Spice Association](#).

Visit Europe's most important food trade events taking place in Germany, such as [FIE](#), [Anuga](#) and [Biofach](#).

The United Kingdom: strong preference for spices from India

Since Brexit in 2020, British imports of spices and herbs from developing countries have grown (+1.7% CAGR)

as imports from the EU plummeted (-17% CAGR). The United Kingdom officially left the EU on 31 January 2020. This has increased the administrative burden for EU exporters to the United Kingdom and has made trade slower and more expensive. It has had a huge negative impact on imports from EU countries. Developing countries' import market share has steadily increased as a result, from 69% in 2019 to 82% in 2023, amounting to an import volume of 75,000 tonnes in 2023.

In the next few years, the upward trend in direct imports will likely continue, though at a much lower rate than in the 2019-2023 period. This will likely be at the expense of imports from Ireland (which still exported 1,500 tonnes to the United Kingdom in 2023) and the Netherlands. Imports from the Netherlands, previously a leading supplier, plummeted from 11,210 tonnes in 2019 to 660 tonnes in 2023. Spain still exported 8,360 tonnes to the United Kingdom in 2023, due to its strong position in dried and crushed sweet and hot peppers.

The United Kingdom is the most important European destination for spices from India, accounting for 39% of Indian spice exports to Europe in 2023. India is the United Kingdom's second-largest supplier of spices, at 17,600 tonnes, behind China (21,700 tonnes), but ahead of Vietnam (7,400 tonnes). The UK's fastest-growing developing country suppliers include Peru (+198% CAGR in 2019-2023), Brazil (+24% CAGR) and Indonesia (+19% CAGR).

The United Kingdom offers opportunities for direct suppliers (Brexit)

In 2023, the British government presented a draft 'Border Target Operating Model' for all goods imported into the country. Part of it is a new, risk-based model of SPS checks for food, animal and plant products. New Safety and Security declarations for EU imports will be required from the end of 2024. A Single Trade Window will simplify the way importers can provide information to the government.

While imports from EU countries may involve more formalities in the next few years, [UK trade agreements with non-EU countries](#) may offer new opportunities to spices and herbs exporters in various developing countries.

The United Kingdom is the largest European market for Fairtrade-certified products. This offers opportunities for Fairtrade-certified spices and herbs exporters. Importers of Fairtrade-certified spices and herbs in the United Kingdom include [British Pepper and Spice Company Limited](#), [Cotswold](#) and [Steenbergs](#). While the first two companies trade in conventional products and limited volumes of organic and Fairtrade spices, Steenbergs specialises in organic and Fairtrade-certified spices.

Tips:

Keep up-to-date with non-EU free trade agreements with the United Kingdom on the [GOV.UK website](#). Another page gives [updates on the EU-UK trade agreement](#).

Check the members list of the [Seasoning and Spice Association](#).

Poland: largest market in Eastern Europe

Poland is the largest market for spices and herbs in Eastern Europe. Imports from developing countries reached 20,000 tonnes in 2023, accounting for 55% of Poland's total spices and herbs imports.

Polish demand for spices and herbs is also driven by the country's role as a hub for the production of seasonings, dressings and sauces. For example, Poland is home to production facilities of British [AB World Foods](#), the parent company of, among others, Blue Dragon and Pataks, which are two leading European brands of Asian sauces and pastes, and also production facilities of [Kraft Heinz](#).

Table 4: Most important developing countries supplying Poland

Supplying country	Export volume (thousand tonnes)	CAGR 2019-2023
Vietnam	5.7	-3.5%
China	4.3	+7.7%
Brazil	2.1	+1.5%
India	1.1	+6.6%
Peru	1.0	+11%
Indonesia	0.9	+4.3%

Source: [GloballyCool](#) based on UN Comtrade, September 2024

Poland's leading suppliers performed well. Some smaller supplying countries experienced a decline, such as Mexico (-3.1% CAGR to 0.8 thousand tonnes).

Vietnam supplies mostly pepper and cinnamon to Poland, while China is the leading supplier of dried chillies and ground ginger, and Brazil of unprocessed ginger. Overall, the direct imports from developing countries of mace (+161% CAGR), nutmeg (+32%), cloves (+19%), cardamom (+13%) and cinnamon (+10%) all grew by $\geq 10\%$ per year in 2019-2023.

Within Europe, Germany, Spain and the Netherlands are Poland's main supplying countries. In 2023, these countries accounted for over 70% of total Polish imports from within Europe. Polish spice imports are carried out by Polish traders like [Rolmex](#), [TomPol](#) and [Grotex](#), as well as by production facilities of German spice manufacturers in Poland, most notably [AVO](#). Poland is among the smaller European markets for organic-certified and Fairtrade-certified produce.

France: Europe's vanilla hub

With the second-largest population in Europe, France is among Europe's largest spices and herbs markets. However, it imports most of its spices and herbs (around 60%) from other European countries. Spain, the Netherlands and Germany are its main suppliers, at 8.2, 7.6 and 5.3 thousand tonnes, respectively, in 2023. The share of direct imports from developing countries used to be much higher (about 60% in 2018 and 2019) but dropped remarkably in 2020, when direct imports of unprocessed ginger from China dropped sharply. Dutch exporters have taken over these imports from China.

In 2023, the country imported 48,000 tonnes of spices and herbs, with 18,000 tonnes sourced directly from developing countries. France is Europe's largest destination for unprocessed vanilla from Madagascar. This has a substantial impact on France's import value, as vanilla is among the most expensive spices. In volume, however, it does not (470 tonnes in 2023). Since France dominates the global vanilla market, it is also a source of trends and innovations, such as organic and Fairtrade vanilla.

Table 5: Most important developing countries supplying France

Supplying country	Export volume (1,000 tonnes)	CAGR 2019-2023
Vietnam	4.7	+5.4%
Indonesia	2.1	-2.2%
Brazil	1.6	-18%
India	1.5	-0.2%
China	1.1	-32%
Madagascar	1.0	-2.6%

Source: [GloballyCool](#) based on UN Comtrade, September 2024

The French market is characterised by the presence of several small and medium-scale trading companies. Some of these traders have specialised in vanilla, like [Prova](#) and [Le Monde de la Vanille](#). Others trade spices at-large, like [Ducros](#) (an independent brand of spices and herbs for retail, owned by McCormick) and [Cepasco](#) (with retail brands Spigol and Epice Tout). Companies from other European countries also have a presence in the French retail market for spices and herbs, like [Fuchs](#) from Germany.

France is known for its large-scale retailers, called hypermarkets. These retailers sell considerable volumes under their own private labels, such as [Carrefour](#) (with Carrefour and Carrefour Bio), [Leclerc](#) (Rustica and eco) and [Auchan](#) (Auchan and Auchan bio).

France has Europe's second-largest number of organic-certified importers of processed agricultural products for use in food. Among these companies are also at least four spices and herbs importers, which contributes to the importance of France as an organic market. The country is also among the top seven Fairtrade markets in Europe. Certified spices and herbs can be imported directly by France's certified importers, or through certified importers from Germany, Spain and the Netherlands.

Tips:

Check the members list of the [National Union of Processors of Pepper, Spices, Herbs and Vanilla](#) to find potential buyers.

Read [CBI's study about the European vanilla market](#). It provides valuable insights into market trends, buyer requirements, the competitive landscape and entry strategies for the European vanilla market.

3. Which products from developing countries have the most potential in the European market for spices and herbs?

This chapter spotlights six promising products to give an idea of the potential for spices and herbs in the

European market. These products are dried chillies, ginger, pepper, juniper berries and miscellaneous seeds, cinnamon and cardamom. This selection was based on the performance of European (EU27 plus the United Kingdom plus Switzerland) import volumes from developing countries, combined with a review of market trends.

Table 6: Top 6 spices and herbs imported by Europe from developing countries, import volume in thousand tonnes (2019-2023)

	2019	2020	2021	2022	2023	CAGR
Chillies and paprika	101.9	119.6	125.3	114.3	122.3	4.7%
Ginger	146.5	159.5	165.4	163.5	149.1	0.4%
Pepper	87.5	84.0	88.8	80.1	68.0	-6.1%
Juniper berries and seeds of anise, badian, caraway and fennel	15.5	16.1	17.9	15.7	14.7	-1.3%
Cinnamon	18.7	20.2	20.4	21.0	18.1	-0.9%
Cardamom	3.2	3.7	4.1	3.6	2.8	-3.5%

Source: [GloballyCool](#) based on UNComtrade, September 2024

The specific opportunities for your spices and herbs will highly depend on your supply capacities, including:

- volume
- quality
- pricing
- certification

These aspects will define your target market and market segment.

An important opportunity lies also in the situation that the number of supplying countries for certain spices and their quality levels may be too limited for certain European buyers. These buyers may therefore be open to new options that could help spread supply risks. Although several countries are important suppliers of spices and herbs, most individual countries supply only a limited range.

Tip:

Also read our studies on other products such as [cardamom](#), [cloves](#), [coriander](#), [cumin seeds](#), [dried garlic](#), [nutmeg](#), [spice mixes](#), [dried thyme](#), and [value-added spices and herbs](#), which may also offer opportunities.

Dried chillies and paprika

Capsicum (chilli and paprika) is a popular spice in European cuisine. The European market widely relies on imports, as capsicums grow best in warm, sunny climates. In 2023, direct imports of dried chillies and paprika from developing countries to Europe totalled 122,300 tonnes. This amounts to an average annual growth rate (CAGR) of 4.7% since 2019. The spice called ‘allspice’ also belongs to this group of spices.

Spain is by far Europe's largest import and processing hub of dried chillies and paprika, generally accounting for more than half of total European imports. Spain's import volumes grew by 7.4% per year in 2019-2023, reaching a record high of 74,400 tonnes in 2023. Germany comes in second place (15,200 tonnes in 2023), followed by the United Kingdom (8,400 tonnes) and the Netherlands (4,900 tonnes).

Table 8: Top developing countries supplying dried chillies and paprika to Europe in 2023

Supplying country	Export volume (thousand tonnes)	CAGR 2019-2023
China	86	+6.5%
India	8.9	+0.2%
Zambia	8.7	+154%
Peru	4.4	-17%
Mexico	3.5	-2.0%
Thailand	1.9	-16%
Brazil	1.8	+4.0%
Türkiye	1.3	-5.1%
Serbia	1.0	-7.2%
Zimbabwe	0.9	+25%
Malawi	0.5	+7.8%
North Macedonia	0.4	+9.0%
Honduras	0.3	-5.7%
Uganda	0.3	+43
South Africa	0.3	-24%
Morocco	0.3	+13%

Uzbekistan	0.3	-6.3%
Tunisia	0.3	-22%
Guatemala	0.2	-3.3%

Source: [GloballyCool](#) based on UN Comtrade, September 2024

India is the world's largest producer of a wide variety of dried chillies. However, it is only Europe's second-largest supplier, as the EU has tightened controls for pesticide presence for several capsicum varieties from India. This makes Europe a difficult market for Indian exporters of dried chillies. Currently, Europe imports most of its chillies from China. The market also offers interesting opportunities for smaller supplying countries. For example, Zambia has become Europe's third-largest supplier within just a few years.

Tips:

Read more about the European market potential in our [study on dried chillies](#).

Watch our [webinar on the dried chillies and capsicums market in Europe](#).

Ginger

Ginger offers opportunities for exporters from many different developing countries. In 2023, direct imports of ginger from developing countries to Europe totalled 149,100 tonnes. This represents a CAGR of 0.4% since 2019. The Netherlands (62,400 tonnes), Germany (30,600 tonnes) and the United Kingdom (26,400 tonnes) are the top three destinations, accounting for a combined share of about 80% of European imports. Smaller markets include Spain (9,500 tonnes), Poland (4,400 tonnes) and Italy (3,200 tonnes).

The trade statistics for ginger include both dried and fresh ginger. Fresh ginger and dried whole ginger account for at least 80% of the total volume exported to Europe, and ground ginger for about 9%. The leading suppliers of dried ginger to Europe are China, Peru, Nigeria and India. Brazil, Thailand and Costa Rica mainly export fresh ginger to Europe, while China and Peru export both fresh and dried ginger to Europe.

Table 7: Top developing countries supplying ginger to Europe in 2023

Supplying country	Export volume (thousand tonnes)	CAGR 2019-2023
China	72	-9.1%
Peru	37	+31%
Brazil	24	+14%
Thailand	5.8	+30%

Nigeria	4.5	-7.0%
India	1.7	-6.6%
Costa Rica	1.0	+25%
Vietnam	0.9	+8.4%
Pakistan	0.1	-29%

Source: [GloballyCool](#) based on UN Comtrade, September 2024

In the coming years, market growth is expected to be driven by several factors. These include the widespread use of ginger in the food and beverage industry, the health benefits of consuming ginger and research on the medical properties of ginger. For example, ginger tea has become very popular across Europe. While the fresh ginger market has greatly benefited from this trend, the dried and semi-dehydrated ginger market has also capitalised on the rising use of ginger as an ingredient in tea mixes and herbal infusions.

The expanding ginger market in Europe offers opportunities for exporters from developing countries. Buyers are increasingly willing to invest in long-term relationships or collaborations with their suppliers to ensure sufficient supplies. Certification, and especially sustainability certification, can give you a competitive edge when supplying ginger to the European market.

Tips:

Read more about the European market potential in our [study on dried ginger](#).

If you are an exporter in Nigeria, keep up to date on our [Ginger Nigeria project](#) (2021-2025) to learn more about general support for the sector, our project partners and specific activities.

Pepper

Pepper is one of the most important and widely consumed spices in Europe. It is an important ingredient in many dishes. The popularity of pepper does not decrease over time, as its specific characteristics make it impossible to find a good substitute. Also, European consumers are used to the taste of pepper, given its centuries-long presence in European cuisine. In 2023, Europe imported 68,000 tonnes of pepper directly from developing countries.

Figure 8: Black pepper before harvesting, Vietnam



Source: [GloballyCool](#), August 2024

Germany is the leading importer (18,900 tonnes in 2023, 28% of European imports), followed by the United Kingdom (9,200 tonnes, 13%), the Netherlands (8,200 tonnes, 12%) and France (6,800 tonnes, 10%). Countries such as Spain (4,000 tonnes), Austria (3,500 tonnes) and Italy (2,200 tonnes) also import substantial volumes.

Table 11: Top developing countries supplying pepper to Europe in 2023

Supplying country	Export volume (thousand tonnes)	CAGR 2019-2023
Vietnam	42	+0.6%
Brazil	12	-17%
India	5.2	-5.4%
Indonesia	4.1	-12%
China	0.8	-4.4%
Cambodia	0.7	-12%
Sri Lanka	0.6	-16%
Madagascar	0.5	-0.1%
Türkiye	0.3	+4.2%
Mexico	0.1	-31%

Source: [GloballyCool](#) based on UN Comtrade, September 2024

Sustainability has become increasingly important and several pepper suppliers in developing countries are members of IDH's [Sustainable Spice Initiative](#). [Nedspice](#), a large international producer of spices from the

Netherlands, has partnered with them to assist farmers in sustainably improving their farming practices. By 2021, more than 2,300 farmers were involved in their Farmers Partnership Programme for the production of sustainable black pepper in Vietnam (Europe's leading pepper supplier), and more than 500 were Rainforest Alliance-certified.

As pepper is the most common spice in Europe, it is also the spice for which organic-certified products are more easily available. Several mainstream supermarkets in Western Europe sell one or more types of organic-certified pepper, like [Albert Heijn](#) from the Netherlands. Overall, the best opportunities for organic-certified pepper are in Western Europe, mostly in Germany, France and the Netherlands. The most important Fairtrade markets are the United Kingdom, Switzerland and Germany.

Tip:

Read more about the European market potential in our [study on pepper](#).

Watch our [webinar about export opportunities for black pepper in Europe](#).

Juniper berries and seeds of anise, badian and caraway

Juniper berries are an aromatic spice commonly used in traditional European dishes such as stews, roasts, sauerkraut and sauces. They are also used to flavour spirits like gin. Despite their name, juniper berries are actually the female seed cones of the coniferous juniper tree. As one of the few spices that grow in cold areas, juniper originates from Northern Europe and alpine regions. They are mainly imported as whole berries, neither crushed nor ground.

Import data for juniper berries also include seeds of anise, badian and caraway. In 2023, Europe imported 14,700 tonnes of these spices. Germany is Europe's leading importer by far, accounting for around 40-50% of total imports (6,100 tonnes in 2023). The United Kingdom and Spain followed, with 13% of the import market each in 2023 (1,900 tonnes).

Table 9: Top developing countries supplying juniper berries and seeds of anise, badian and caraway to Europe in 2023

Supplying country	Export volume (thousand tonnes)	CAGR 2019-2023
Egypt	4.8	+0.6%
China	1.6	-9.0%
Türkiye	1.4	-5.2%
Syria	1.3	+11%
India	1.3	-6.5%
North Macedonia	1.1	-4.5%

Serbia	1.0	+1.5%
Vietnam	0.8	+9.1%
Albania	0.6	-8.1%
Bosnia Herzegovina	0.5	+13%

Source: [GloballyCool](#) based on UN Comtrade, September 2024

Egypt is Europe's leading supplier of this product category, mainly due to exports of anise and caraway seeds. Türkiye is among the world's leading producers of juniper berries. North Macedonian juniper berries are known for their quality and high essential oil content, making the country a preferred supplier for companies like [Verstegen](#) in the Netherlands.

Cinnamon

Cinnamon is an important spice with many applications in the European market, but most notably in the bakery segment. Also, [Ceylon](#) (not cassia) cinnamon is often considered a functional ingredient. An effective dose (1-6 gr per day) has anti-diabetic (blood sugar-lowering) effects. Mostly because of this property, Ceylon cinnamon has considerable growth potential in the European market.

European imports of cinnamon (whole and crushed/ground) from developing countries reached 18,100 tonnes in 2023. These imports generally fluctuate between around 18,000 and 22,000 tonnes per year.

Table 10: Top developing countries supplying cinnamon to Europe in 2023

Supplying country	Export volume (thousand tonnes)	CAGR 2019-2023
Indonesia	6.1	-6.3%
Vietnam	5.5	+11%
China	2.1	+11%
Madagascar	1.8	-8.1%
Sri Lanka	1.5	-5.6%
India	0.6	-9.2%
Tanzania	0.3	-3.8%

Source: [GloballyCool](#) based on UN Comtrade, September 2024

Vietnam is likely to further increase its market share in the next few years and overtake Indonesia as Europe's leading supplier of cinnamon. Interestingly, although Vietnam has significantly grown its cinnamon production in the past decade, part of its exports are re-exported cinnamon originally imported from Indonesia. Vietnam is

among Indonesia's most important export destinations for cinnamon.

Sri Lanka's cinnamon exports have been under pressure due to the relatively high prices of its Ceylon cinnamon. Promising for Sri Lanka's cinnamon industry is that in 2022 the country received its [first-ever Geographical Indication \(GI\) certification from the European Commission](#). Also, the Sri Lanka Export Development Board (EDB) has established [Pure Ceylon Cinnamon](#) as a global brand. This brand can be only used by companies that have acquired a relevant Food Safety Management System certificate.

Organic and sustainably sourced cinnamon is mostly found in organic supermarkets in Europe like [Ekoplaza](#) (Netherlands), [Bio c' Bon](#) (France), and [Alnatura](#) and [Biomarkt](#) (Germany). In the United Kingdom, Switzerland and the main Nordic countries, organic-certified and Fairtrade-certified products can be found in mainstream supermarkets too.

Tip:

Read more about the European market potential in our[study on cinnamon](#).

Cardamom

Cardamom, often called the ‘Queen of Spices’, holds a unique place in the European market, particularly due to its uses in ethnic cuisine and health products. European demand for cardamom is driven by the growing popularity of South Asian and Middle Eastern cuisines and its use in traditional European recipes. In the United Kingdom, cardamom is used in tea blends.

In 2023, Europe imported 2.8 thousand tonnes of cardamom, mainly from developing countries such as Guatemala and India. Guatemala is the largest producer globally and supplies over 60% of Europe's cardamom imports, often at competitive prices. India meanwhile excels in the niche market for certified organic and Fairtrade cardamom, supplying nearly 9% of European imports.

The European market is focused on high-quality and sustainably sourced cardamom. Organic certification is gaining importance, with countries like Sweden and the UK leading organic product consumption. Single-origin spices are also becoming popular as consumers seek traceable and unique products with distinctive flavours. While whole cardamom dominates the European market in terms of volume, ground cardamom is more stable and appears to be a growing segment, particularly from Guatemala.

Guatemala and India dominate this market, but countries such as Honduras, Tanzania and Indonesia are emerging players, offering opportunities in niche segments that may not be fully exploited yet, such as for cardamom with a very volatile oil content. European buyers increasingly want transparency and sustainably produced and dried cardamom and are demanding strict compliance with food safety regulations. India faces particular challenges here, with cardamom shipments subject to increased border control following numerous incidents with high pesticide levels.

Table 12: Top developing countries supplying cardamom to Europe in 2023

Supplying country	Export volume (thousand tonnes)	CAGR 2019-2023
Guatemala	2.23	-4.7%

India	0.32	1.9%
Honduras	0.07	10.7%
Tanzania	0.05	28.0%
Vietnam	0.02	-2.4%
Indonesia	0.02	75.2%

Source: [GloballyCool](#) based on UN Comtrade, September 2024

Preliminary forecasts for the 2024-2025 cardamom harvest in Guatemala, the world's leading cardamom production country, indicated a lower production output, by up to 50%. Production will reach between 17,000 and 20,000 tonnes, down from the usual approximately 36,000 tonnes per year. This drop is expected to have a huge impact on global cardamom prices in the short to medium term and shows that the overreliance on one supply country makes the supply chain vulnerable. The production shortfall in Guatemala will create opportunities for other cardamom-producing countries.

Tip:

Read our [studies on exporting cardamom to Europe](#).

[Globally Cool](#) carried out this study on behalf of CBI.

Please review our [market information disclaimer](#).