

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 certified spices, and related certification is becoming more important. Among the products in highest demand are ginger, dried chillies and pepper. Curcuma, cinnamon and vanilla are also products with good opportunities on 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 UK, Poland and France.

Europe's mature and large market offers stability for suppliers

Europe is a mature and diverse market for spices and herbs, and home to 5 of the 10 largest importing countries in the world. The overall demand in Europe is relatively stable, and volumes are large. With a population of over 530 million consumers, Europe imports more spices and herbs than the US, for example.

Figure 1 shows that spices and herbs imports from Asia take a considerable share of the global market. 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 spices are produced and processed in tropical regions of Asia.

Source: UNComtrade (July 2023)

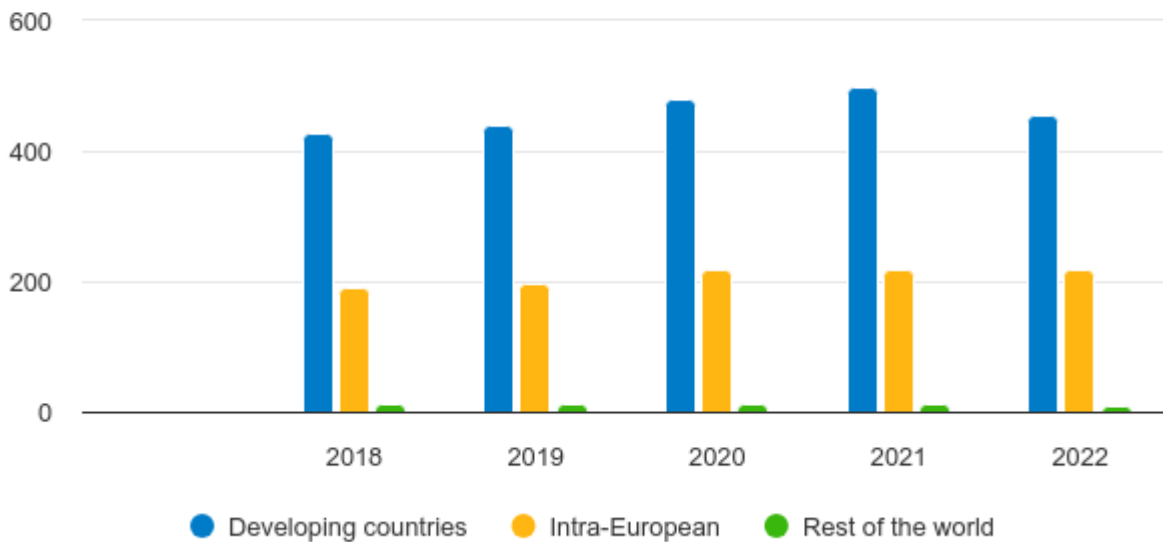
On average, Europe imports about 450,000 tonnes of spices and herbs from developing countries every year. This is between 20-23% of the global average annual volume of spices and herbs coming from developing countries. Europe is an important destination for the more expensive spices and herbs. This is also reflected in its 27-30% share in global imports value.

Europe depends on imports from developing countries

Most of Europe's spice imports come from developing countries (developing countries are all countries of 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.

Figure 2: European imports of spices and herbs, by main origin

in 1,000 tonnes



FIBL, 2022

Source: UN Comtrade (July 2023)

Over 2018-2022, the import volume of spices and herbs grew by 2.0% per year on average. The volume of spices and herbs imported from developing countries registered a lower growth (+1.6%). The highest growth was for intra-European trade (+3.3%), while imports from the 'rest of world' declined by 2.9%.

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 and Hungary. Parsley is the most popular dried herb, but European production also includes basil, bay leaves, celery leaves, chives, coriander, dill tips, chervil, fennel, juniper, marjoram, oregano, rosemary, sage, savoury, tarragon and thyme.

Recent years seem to show a decline in domestic production in these European countries. If this trend continues and the lower domestic or regional supply is supplemented with imports, it could offer opportunities for developing country suppliers. At the same time, it should be noted that some spices, such as coriander seeds, are mostly exported to Asia. So declining production will not open up opportunities in Europe, but rather in Asia, the product's destination market.

The level of competition is affected too: the more processing is done in the origin country, such as crushing, grinding, blending and mixing, and packaging, the more competition exporters from developing countries will face from European companies. At the same time, [exporters of developing countries certainly have chances to add more value to their product.](#)

Forecast: volumes to remain stable

In the short-to-medium term, European import volumes will remain relatively stable. 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.

More important is the forecast that prices are likely to go up due to higher costs of production in origin countries and in European destination markets. Especially inflation in European end-markets can be a serious threat to

the European consumption of certain products within the spices and herbs category. This will mostly be visible for products that are already more expensive in general, such as cardamom, nutmeg and mace. But more importantly, it is likely to affect sales of organic spices and herbs, as these are generally more expensive.

Figure 3: Nutmeg in a Swiss mainstream supermarket



Source: Photo by [Globally Cool](#)

According to the [Harmonised index of consumer prices \(HICP\) in EU markets](#), salt, spices and culinary herbs were 130.17 points in July 2023 (EUROSTAT), compared to 115.18 points in October 2022. This means that consumer prices for salt, spices and culinary herbs went up 12% in nine months. Also, the [outlook for the inflation level in Europe](#) shows that inflation in 2023 will remain above pre-2022 levels (above 5%), and only in 2024 will it drop to 2.1%.

While European imports are likely to continue increasing at moderate rates over the coming years, they are expected to remain lower than in other regions worldwide, such as South Asia and Southeast Asia, where economic and market growth have been much higher on average 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 (UK), Algeciras (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 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. Germany also has such a function and that will stay the same too, while France (for vanilla from Madagascar) and Spain (for dried chillies and particular herbs used in processing) will likewise remain important hubs. Germany is specifically a strong re-exporter of black pepper imported from Brazil.

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 (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. In 2022, the supply volume in the most important production country, Vietnam, was much lower than in 2021.
- 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.

T. Scholtens, de Kurkumaspecialist:

During Covid in 2020 and 2021, we noted a remarkable shift from curcuma capsules to pure curcumin capsules. Obviously, consumers were looking for ways to boost their immune system.

- Cumin imports peaked in 2021 due to record harvests. Because of misharvests in 2022 (mostly in Turkey), imports dropped to levels almost as low as those of 2019.
- Nutmeg imports were down in 2020 and 2021 but went up in 2022.
- Remaining stable at record volumes in 2021 and 2022: cloves and vanilla.

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, Turkey and Brazil.

Table 1: European import volume from developing countries, by spice, 2018-2022, per year and over time

	2018	2020	2022	CAGR 2018-2022
Ginger	139.9	159.3	161.8	3.7%
Capsicum	98.8	119.6	113.1	3.4%
Pepper	81.0	84.0	76.1	-1.6%
Curcuma	21.2	27.8	20.5	-0.9%
Cinnamon	22.2	20.2	20.2	-2.3%
Anise etc	16.4	16.1	15.5	-1.4%
Cumin	15.5	17.6	14.8	-1.1%
Coriander	9.6	9.5	9.9	0.8%
Nutmeg	5.4	4.9	5.2	-0.5%
Cardamom	3.0	3.6	3.6	4.5%
Cloves	3.1	3.1	3.4	2.5%

Vanilla	1.3	1.0	1.7	8.1%
Mace	1.0	1.1	1.0	-0.8%
Saffron	0.9	0.2	0.1	-37.5%

Source: UNComtrade (September 2023)

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 (56,000 tonnes in 2022) are still much lower than import volumes of unground spices (240,000 tonnes), the latter grow at a much higher rate (14% versus 2.6% per year on average).

Table 2: European imports from developing countries of ground spices versus whole, unground spices, 2018-2022, in thousand tonnes

Product	Import Volume 2018	Import Volume 2022	Absolute growth 2018-2022	CAGR 2018-2022
Spices, unground	239.3	241.5	2.2	0.2%
Cardamom	2.7	3.1	0.4	3.8%
Cinnamon	11.1	12.3	1.3	2.7%
Cloves	2.8	3.1	0.3	2.3%
Coriander seeds	6.1	6.0	-0.1	-0.5%
Cumin seeds	11.5	9.6	-1.9	-4.4%
Ginger	129.9	147.1	17.2	3.2%
Mace	0.6	0.4	-0.2	-10.0%
Nutmeg	2.8	2.1	-0.7	-6.9%
Pepper	67.7	57.9	-9.8	-3.8%
Vanilla	1.1	1.5	0.4	8.0%
Spices, ground	42.6	56.2	13.7	7.2%
Cardamom	0.3	0.5	0.2	10.0%

Cinnamon	8.0	9.4	1.4	4.2%
Cloves	0.3	0.3	0.1	4.4%
Coriander	3.5	3.9	0.4	3.0%
Cumin	3.9	5.2	1.2	7.1%
Ginger	10.0	14.7	4.7	10.1%
Mace	0.5	0.6	0.2	7.4%
Nutmeg	2.6	3.2	0.6	5.2%
Pepper	13.3	18.2	4.9	8.1%
Vanilla	0.2	0.2	0.1	8.9%

Source: Globally Cool, based on UNComtrade data (September 2023)

Above-average import growth for sustainably produced spices and herbs

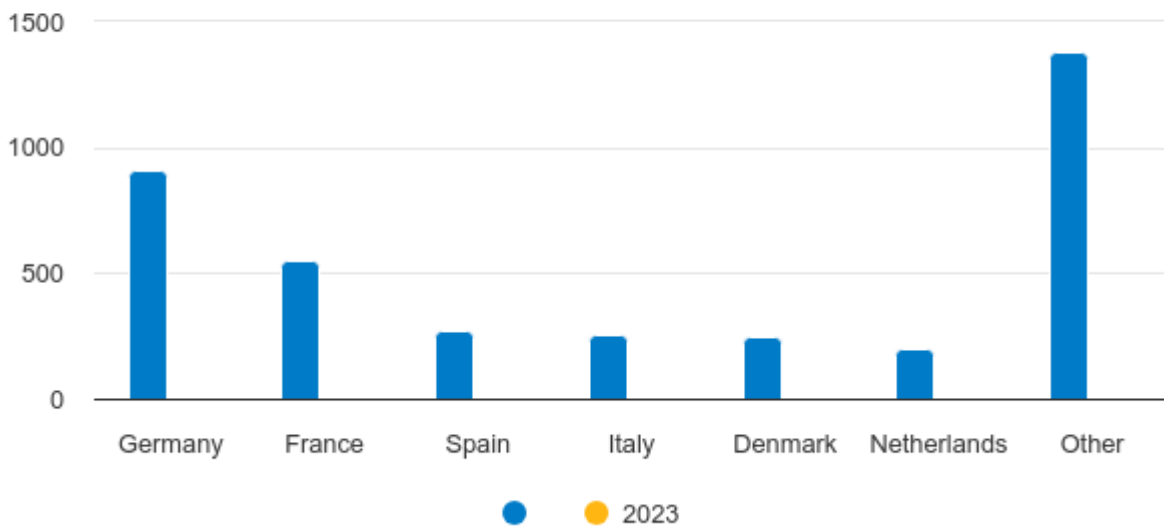
The largest organic food markets in Europe are Germany, France, Italy and Switzerland, with estimated retail market values of €15, €13, €3.9 and €3.3 billion, respectively. As a percentage of the total market, organic food market volumes differ per country. In Germany, for example, this percentage is 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 1% in Europe.

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 UK and Switzerland are not included in this database, as neither country is part of the European Union. The two countries, especially Switzerland, are important markets for organic spices and herbs.

Figure 4: Number of EU organic certified importers of processed agricultural products for use in food, by leading countries



ITC Trademap / Eurostat, 2022

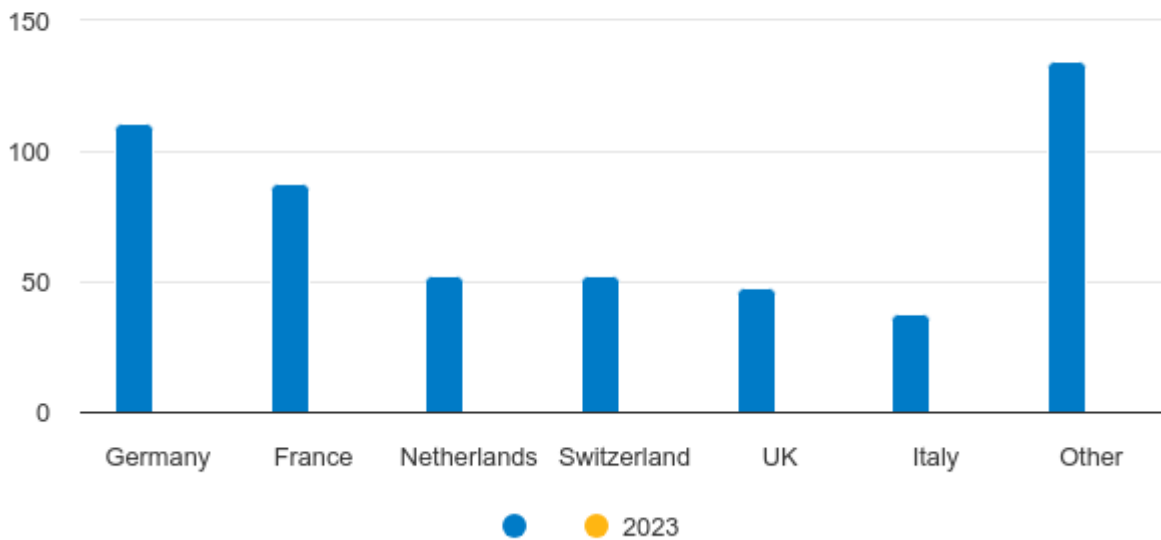
Source: EU Commission database (July 2023)

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.

Figure 5: Number of Fairtrade-certified spices and herbs traders in Europe, by leading countries

by number of companies



ITC Trademap / Eurostat, 2022

Source: 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 UK, while Switzerland too has developed into an important market. One of the pioneering companies for Fairtrade-certified spices in the UK is [Steenbergs](#). One of the market leaders in the UK, [British Pepper and Spice](#), has also obtained a Fairtrade certificate.

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 UK (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).

Tips:

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

Keep up with market developments using [Nedspice Market Updates](#) and [ITC's Market Price Information \(MPI\)](#).

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 2022](#).

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 UK, 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.

Figure 6: European markets by spices and herbs import volume

in 1,000 tonnes

No data to display



ITC Trademap / Eurostat, 2022

Source: UNComtrade (July 2023)

Each region has different supply profiles

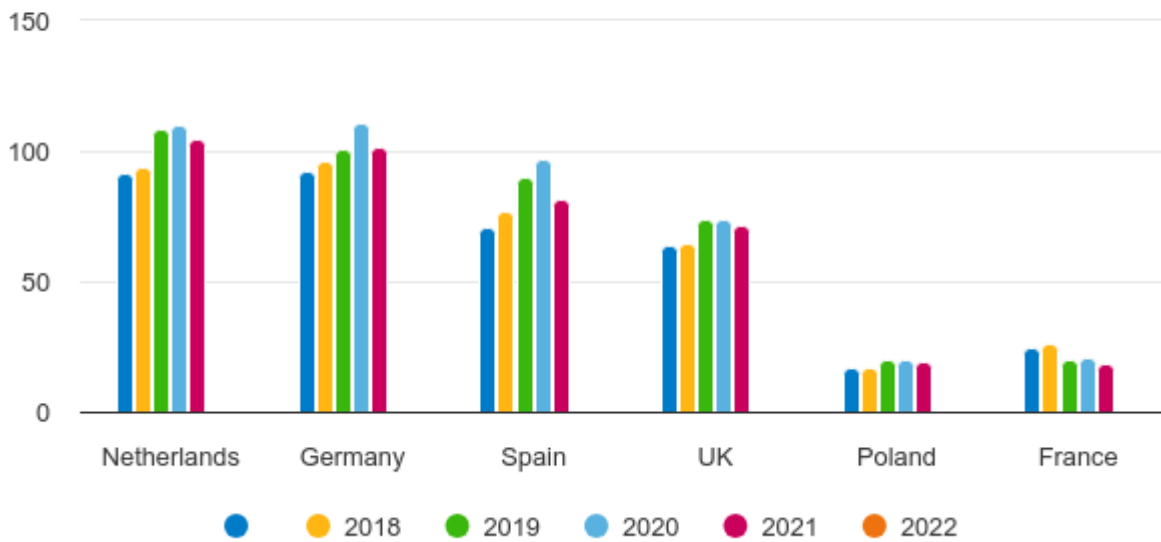
You can group European countries into roughly four different regions: Western, Northern, Southern and Eastern Europe. Each region has a different profile if you look at their supplying regions. The most important characteristics and differences are:

- Western Europe accounts for more than half of Europe's spices and herbs imports. It is home to the two top importing countries, the Netherlands and Germany, while France is another large market. Western Europe is the dominant destination region for spices and herbs from South America (Brazil and Peru) and Southeast Asia. It is also the main market for intra-European trade coming from Western and Southern Europe.
- Southern Europe is a relatively small market for spices and herbs, accounting for 19% of European imports. 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. The UK is good for about two-thirds of the total market. This region stands out because of its relatively high imports from South Asia (dried chillies, curcuma and cumin from India) and East Asia (ginger from China), and limited volumes from South America.
- Eastern Europe takes 11% of European imports, with Poland accounting for over 40% of the region's imports. Most of the region's imports come from East Asia (China), Southeast Asia (Vietnam mostly), and Western and Southern Europe.

Europe's largest destinations for spices and herbs

Figure 7: Top 6 destinations in Europe for spices and herbs from developing countries

in 1,000 tonnes



ITC Trademap / Eurostat, 2022

Source: UNComtrade (July 2023)

The Netherlands, Germany and France (Western Europe), Spain (Southern Europe), the UK (Northern Europe) and Poland (Eastern Europe) are the largest destinations for spices and herbs from developing countries. Buyers in these countries have gained 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 the large import markets of the Netherlands, Germany, Spain, the UK, Poland and France. A good way to reach a decision regarding these markets is to visit European trade fairs. Start with the leading trade fairs in Europe: [Anuga](#) in Cologne (Germany), [Sial](#) in Paris (France) and [Biofach](#) in Nuremberg (Germany). Another trade fair where you may find good trading partners is [Fi Europe](#) in Frankfurt (Germany), which is dedicated to food ingredients.

Diversify your markets to spread risks, so try to focus on at least a few countries from different regions.

Find out who the major food retailers are in each European country at [Retail-index.com](#). 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.

The Netherlands: European hub for spices

The Netherlands has always been among the top-3 importing countries for spices and herbs in Europe, but 2022 was the first time the country took the lead position - over Germany. The 2022 import volume of 134,000

tonnes was lower than the 2021 record of 137,000 tonnes, but compared to 2018 it was still a relatively high growth of 3.4% per year. The import volume from developing countries was 105,000 tonnes. The share of imports from developing countries in total imports remained relatively stable (78%).

China stood out as the leading supplier to the Netherlands (40,000 tonnes in 2022, 38% share of imports from developing countries). Brazil (18%) and Peru (14%) took second and third place, with fast-growing imports in 2018-2022 (+25% and +24%, respectively). Also exports from Vietnam and India grew relatively fast (+10% and +11%, respectively).

Imports from within Europe mostly come from Germany. The top European destinations of Dutch exports and re-exports of spices and herbs are France, Belgium and Germany.

Dutch traders include [Royal Polak](#), [DeMolukken](#), [Vehgro](#), [Catz](#), [H.J. Albring](#) and [Keyzer & Company](#). Some of these companies are pure spice specialists (e.g. H.J. Albring, Keyzer & Company), others focus on a single spice (e.g. Royal Polak, with cinnamon), and others trade a wider range of ingredients (e.g. Catz, also trading nuts; DeMolukken, also trading grains and pulses; and Vehgro, trading a range of organic ingredients).

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 spices 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](#) such as meeting the benchmark for sustainable sourcing. 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. Most organic-certified spices and herbs are sold in organic retail chains, such as [Odin](#) and [Ekoplaza](#). They are mostly sold as a standalone spice; however, they can also be found as ingredients in organic-certified spice mixes and prepared food products. 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 spices and herbs market in Europe

Germany has more than 83 million inhabitants and a strong purchasing power. Although German imports are not the largest (132,000 tonnes in 2022, less than the Netherlands), re-exports to other European countries are smaller than Dutch re-exports. This makes Germany the largest market in Europe. Imports from developing countries were 102,000 tonnes in 2022. The share of imports from developing countries in total imports remained stable at about 77% in 2018-2022.

Although import volumes dropped in 2022, the CAGR in 2018-2022 reached 2.6% for total imports and 2.5% for imports from developing countries. Several countries reached high growth:

- China, the largest developing country supplier (34,000 tonnes in 2022) grew exports to Germany by 8.2% per year (mainly due to ginger and dried paprika)
- Vietnam, second largest supplier: 14,000 tonnes, +7.7% (mainly due to pepper)
- Peru, fifth-largest supplier: 6,900 tonnes, +8.2%

- Nigeria, sixth-largest supplier: 6,000 tonnes, +22%

Two countries experienced considerable declines in exports to Germany: Brazil (second-largest supplier with 11,500 tonnes, -9.1%) and Indonesia (-8.8%). Both declines 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 the downward trend in planted area of white pepper caused the decline in exports.

Germany also imports considerable volumes from the Netherlands and Spain, while its main re-export destinations of spices and herbs are the Netherlands, Austria and France. 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 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, organic-certified spices and herbs are sold mostly in organic retail chains like [Biomarkt](#), [DM](#) and [Alnatura](#).

Organic spices are mostly sold in standalone form; however, they 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 UK. [Weltpartner](#) is a key importer of Fairtrade products in Germany and sells several spices and herbs. Other companies trading Fairtrade-certified spices and herbs are [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](#).

Spain: leading importer of dried chillies, saffron and cumin

Spain is Europe's leader in terms of share imported from developing countries: over 93% of all imports in 2022 came from developing countries (82,000 tonnes). Imports from developing countries increased by 3.8% per year, which was more than imports from within Europe (-0.6%). On average, imports grew by 3.5% annually.

Spain's most imported product is dried chillies, with 61,000 tonnes in 2022 (+4.5% per year). They are used for the production of paprika. Spain is the largest paprika producer and processor in the world of a range of dried paprika derivatives that are widely used as colouring and flavouring agents in e.g. food preparations. Spain is also among the three leading European markets for saffron, together with the UK and Ireland. Lastly, Spain is

another top market for cumin within Europe, together with the UK and the Netherlands.

Both saffron and paprika are important ingredients for Spain's main rice dish, paella, and many other culturally important recipes. Cumin is not a traditional spice in Spain, but has become a popular spice in the south of the country. Only 40% of the imported cumin goes to the local market, the other 60% is re-exported. Spain's most important destinations of spices and herbs exports (including cumin, but mostly dried chillies) are the UK, Germany, France and the Netherlands.

Table 3: Most important developing countries supplying to Spain

Supplying country	Export volume (1,000 tonnes)
China	54
Peru	8.2
India	4.7
Vietnam	3.6
Brazil	1.7
Egypt	0.7

Source: UN Comtrade (September 2023)

There are around 110 companies in Spain specialised in trading and manufacturing spices. The country has a very dynamic food industry, focused strongly 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 UK and the Western European countries Germany, Switzerland and the Netherlands. Spanish organic-certified spice importers include [Sabatër](#) and Biospices (in Benimarfull).

Tip:

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

The United Kingdom: strong preference for spices from India

Since Brexit in 2020, direct import of spices and herbs from developing countries has increased remarkably. The UK officially left the EU on 31 January 2020 (Brexit). This has increased the administrative burden for EU exporters to the UK and has made trade slower and more expensive. It had a huge negative impact on import volumes from other European countries, and a positive impact on direct imports from developing countries.

While until 2020 the share of imports from developing countries did not reach above 69%, the share went up to 71% in 2020, 76% in 2021, and 80% in 2022. In 2022, over 74,000 tonnes came from developing countries. This was an average annual growth of 2.9%, versus a 13% decline of imports coming from other European countries.

In the next few years, the trend of more direct imports will continue, and more and more spices and herbs will be imported directly from origin countries. This will mostly be at the expense of imports from Spain and the Netherlands, which were still at 8,300 and 2,100 tonnes, respectively, in 2022.

The UK is the most important destination in Europe for spices from India. In 2022, this volume was good for 45% of Indian spice exports to Europe (20,800 tonnes). India is the second-largest supplier of spices, behind China (26,300 tonnes) and ahead of Vietnam (8,300 tonnes).

Table 4: Fastest-growing developing countries supplying to the United Kingdom

Supplying country	CAGR 2018-2022	Export volume (thousand tonnes in 2022)
Indonesia	+23%	2.2
Nigeria	+22%	0.7
Turkey	+16%	2.4
Argentina	+15%	0.7
Vietnam	+11%	8.3

Source: UN Comtrade (September 2023)

UK offers opportunities for direct suppliers (Brexit)

In Spring 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, to be rolled out from the end of 2023. 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, the [UK trade agreements with non-EU countries](#) may offer new opportunities to spices and herbs exporters in various developing countries.

The UK is the largest market for Fairtrade-certified products. This offers opportunities for Fairtrade-certified spices and herbs exporters. Importers of Fairtrade-certified spices and herbs in the UK include [British Pepper and Spice Company Limited](#), [Cotswold](#) and [Steenbergs](#). While the first two companies trade conventional products and limited volumes of organic and Fairtrade spices, Steenbergs has specialised 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 19,100 tonnes in 2022, accounting for 60% of Poland's total spices and herbs imports. In 2018-2022, direct imports from developing countries grew faster (+2.9% CAGR) than imports from within Europe (+2.0% CAGR). In 2022, 60% of total Polish imports came from developing countries.

The high Polish demand for spices and herbs is also because of Poland's role as a hub for the production of seasonings, dressings and sauces. For example, Poland is home to production facilities of the British company [AB World Foods](#), the parent company of, among others, the two major European brands of Asian sauces and pastes, Blue Dragon and Pataks. In 2022, [Kraft Heinz announced a large investment](#) in its Polish production unit, at the expense of the sauce production facility in the UK.

Table 5: Most important developing countries supplying to Poland

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
Vietnam	6.8	+4.8%
China	4.5	+7.4%
Brazil	2.3	+7.4%
India	1.9	+8.1%

Source: UN Comtrade (September 2023)

Several of the smaller supplying countries experienced a decline in exports to Poland: Indonesia (-4.5% to 0.9 thousand tonnes), Mexico (-3.1% to 0.6 thousand tonnes), and Peru (-24% to 0.5 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 saffron (+66% CAGR), ground cumin (+62%), ground nutmeg (+23%) and ground cardamom (+22%) all grew by more than 20% per year.

Within Europe, the Netherlands, Spain and Germany are the main supplying countries. In 2022, the three countries accounted for over 80% 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 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, most of the spices and herbs (59%) come from other European countries. The Netherlands, Spain and Germany are the main suppliers, with 9.1, 7.6 and 4.1 thousand tonnes in 2022. 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.

In 2022, the country imported 44,500 tonnes of spices and herbs, with 18,400 tonnes sourced directly from developing countries. France is Europe's largest destination of unprocessed vanilla from Madagascar. This fact has a substantial impact on France's import value, as vanilla is among the most expensive spices. In volume, however, this is not making a large impact (805 tonnes in 2022). Since France dominates the global vanilla market, it is also a source of trends and innovations, such as organic and Fairtrade vanilla.

France is also a relatively important destination for unprocessed pepper (second place, far behind the UK) and unprocessed cloves from developing countries (second place, behind the UK). Important supplying countries from within Europe are the Netherlands, Spain and Germany. Dutch exports to France rose significantly since the country took over the unprocessed ginger volume that came from China until 2019.

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](#), while others trade spices at-large, like [Ducros](#) (an independent brand of spices and herbs for retail, and owned by McCormick) and [Cepasco](#) (with retail brands Spigol and Epice Tout). Also, companies from other European countries have a presence in the French retail market for spices and herbs, like [Fuchs](#) from Germany.

Table 6: Most important developing countries supplying to France

Supplying country	Export volume (1,000 tonnes)	CAGR 2018-2022
Vietnam	4.8	+19%
Indonesia	2.8	+0.3%
India	2.8	-1.2%
China	1.8	-24%
Madagascar	1.6	+0.4%

Source: UN Comtrade (September 2023)

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

France has Europe's second-largest number of organic-certified importers of processed agricultural products for use in food. Among these companies are also more than four spices and herbs importers, which contributes to the importance of France as an organic market. The country is also in the top-7 of 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.

Tip:

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

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

This chapter highlights six promising spices to give you an idea of the potential in the European market: ginger, dried chillies, curcuma, cinnamon, pepper and vanilla. The selection of these six products was based on the performance of European (EU27 + UK + Switzerland) import volumes from developing countries, combined with a review of market trends.

Opportunities in the European spices and herbs market

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.

Table 7: Top-6 spices and herbs imported by Europe from developing countries, import volume, in thousand tonnes (2022)

	2018	2019	2020	2021	2022	CAGR
ginger	139.9	146.4	159.3	165.7	161.8	3.7%
dried chillies	98.8	101.9	119.6	125.4	113.1	3.4%
curcuma	21.2	24.8	27.8	26.3	20.5	-0.9%
cinnamon	22.2	18.6	20.2	20.3	20.2	-2.3%
pepper	81.0	87.4	84.0	88.9	76.1	-1.6%
vanilla	1.3	1.2	1.0	1.7	1.7	8.1%

Source: UNComtrade (July 2023)

Tip:

There are opportunities for developing-country suppliers of many spices, simply because Europe depends on imports. Read the CBI market studies on the other potential products – [cardamom](#), [cloves](#), [coriander](#), [cumin seeds](#), [dried garlic](#), [nutmeg](#), [spice mixes](#), [dried thyme](#), and [value-added spices and herbs](#).

Ginger

Ginger offers opportunities for exporters from many different developing countries. In 2022, direct imports of ginger from developing countries to Europe totalled 162,000 tonnes. The import volume has increased by 3.7% annually since 2018. The Netherlands (70,000 tonnes), Germany (34,000 tonnes) and the UK (29,000 tonnes) form the top-3 destinations with a total share of 82% of European imports. Spain, Italy and France import smaller quantities (9.3, 2.6 and 2.2 thousand tonnes).

The statistics for ginger also include fresh ginger. Fresh ginger accounts for at least 80% of the total ginger volume exported to Europe. Ground ginger takes about 9% of the total volume. The leading suppliers of dried ginger to Europe are China, Peru, Nigeria and India.

The market has grown considerably in recent years because of the increasing popularity of ginger as a healthy ingredient in dishes and other foods or drinks, such as fruit and nut bars, as well as teas and herbal infusions. In recent years, 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 have also benefited from this rising use of ginger as an ingredient in tea mixes and herbal infusions. This trend was enhanced during the COVID-19 pandemic, which accelerated European imports of ginger.

The expanding ginger market in Europe offers chances 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 can give you a competitive edge when supplying ginger to the European market. There is a growing association between ginger's health properties and its sustainable sourcing.

Table 8: Top developing countries supplying ginger to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
China	96	-2.7%
Peru	27	+19%
Brazil	24	+38%
Nigeria	8.5	+16%
India	1.7	-3.9%
Thailand	1.4	-16%

Costa Rica	0.6	+34%
Madagascar	0.2	+6.1%
Pakistan	0.2	-18%
Indonesia	0.2	-11%

Source: UN Comtrade (September 2023)

Tips:

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

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

Dried chillies

Capsicums are a popular spice in European cuisine. The European market widely relies on imports, as capsicums best grow in warm, sunny climates. In 2022, direct imports of dried chillies from developing countries to Europe totalled 113,000 tonnes. The import volume has increased by 3.4% annually since 2018.

Spain is by far Europe's largest import and processing hub of dried chillies, accounting for more than half of total European imports in 2022. Spain's imports increased by 4.0% per year in volume between 2018 and 2022, recording its highest-ever import volume of 72,000 tonnes in 2021. Germany comes in second place (17,600 tonnes) in 2022, followed by UK and the Netherlands (8,500 and 7,500 tonnes).

Table 9: Top developing countries supplying dried chillies to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
China	77	+4.1%
India	9.6	+1.9%
Peru	5.1	-7.0%
Thailand	4.3	+7.5%
Mexico	3.3	-0.1%
Turkey	2.2	+7.6%

Brazil	1.6	-8.0%
Serbia	1.0	+0.1%
Uzbekistan	0.5	-8.0%
South Africa	0.3	-25%
Honduras	0.3	-19%
Tunisia	0.2	-26%

Source: UN Comtrade (September 2023)

India, the world's largest producer of a wide variety of dried chillies, comes only second in the list as the European Union has in place an increased control for pesticides presence in a few capsicum varieties from India. This makes Europe a difficult market for India's dried chillies exporters.

Tips:

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

Watch CBI's [Webinar: Dried chillies and capsicums market in Europe - YouTube](#).

Curcuma

Curcuma longa (turmeric) is an important ingredient of curry powders that is widely used in South Asian and Middle Eastern-style dishes across Europe. It is also used as a natural colourant in the food industry for a wide variety of products. Also, the product has become a trendy supplement in healthy diets. For the short-to-medium term, European consumption and imports of Curcuma longa are forecasted to increase at an average annual rate of 3-5%, mostly thanks to its health-supporting properties.

Curcuma's imports peaked in 2020-2021 because of COVID-19, with its massive use as an immunity booster. Already early into the pandemic, there were [reports](#) and [trials](#) on the effect of curcumin use as a preventive measure. All this publicity put curcuma in the limelight during the pandemic and [greatly boosted imports](#). In 2022, COVID-19 was more or less over in Europe and curcuma imports went down again to pre-pandemic levels.

The Netherlands, Germany and the UK are the main European markets for Curcuma longa. Interesting to mention here is that the UK lost its hub function for Curcuma longa trade and processing in Europe since Brexit in 2020. Brexit has created [extra difficulties for British companies to export to other EU countries](#), leading to a shift of trade to other European countries at the expense of the UK. European imports of Curcuma longa from developing countries reached 20,500 tonnes in 2022.

Table 10: Top developing countries supplying curcuma to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
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India	16	-2.7%
Peru	2.4	+25%
Madagascar	0.3	-6.1%
Costa Rica	0.3	+11%
Vietnam	0.3	+19%
Thailand	0.2	-12%
Indonesia	0.1	-6.3%

Source: UN Comtrade (September 2023)

The market share for organic *Curcuma longa* is believed to be small (less than 5%), but it is forecasted to grow faster than that of conventionally produced curcuma. Fairtrade-certified curcuma is also available in the European market, with the largest presence in the UK, Switzerland and Germany.

Figure 8: Organic-certified curcuma in a Dutch organic supermarket



Source: Photo by [Globally Cool](#)

Tip:

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

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 20,200 tonnes in 2022. The reference year 2018 was a record year for worldwide cinnamon production (22,200 tonnes imported by Europe). Import volumes dropped sharply in 2019 but were stable in 2020-2022.

Table 11: Top developing countries supplying cinnamon to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
Indonesia	6.9	-12%
Vietnam	6.5	+14%
Madagascar	2.5	-2.0%
China	2.0	+12%
Sri Lanka	1.2	-14%
India	0.6	-4.8%
Tanzania	0.4	+19%
Turkey	0.1	+22%

Source: UN Comtrade (September 2023)

Vietnam is likely to further increase its exports to Europe in the next few years, so it will most likely overtake the leading supplier position from Indonesia. Interestingly, although Vietnam has significantly grown its cinnamon production in the past decade, part of Vietnamese exports is 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 are mostly found in organic supermarkets in Europe like [Ekoplaza](#) (Netherlands), [Bio c' Bon](#) (France) and [Alnatura](#) and [Biomarkt](#) (Germany). In the UK, 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 the [CBI study on cinnamon](#).

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. During 2022, Europe imported 76,100 tonnes of pepper directly from developing countries.

Germany is the largest importing country (25,000 tonnes in 2022, 32% of European imports). Behind Germany come the UK, the Netherlands and France (imports of 10.2, 9.4 and 7.6 thousand tonnes). Spain, Italy and Sweden also import substantial volumes (3.4, 2.9 and 1.7 thousand tonnes).

Table 12: Top developing countries supplying pepper to Europe

Supplying country	Export volume (thousand tonnes)	CAGR 2018-2022
Vietnam	44	+5.6%
Brazil	16	-11%
Indonesia	5.8	-3.5%
India	5.4	-3.3%
Cambodia	1.1	+23%
Sri Lanka	0.8	-9.4%
Madagascar	0.5	-8.6%
Turkey	0.3	-3.6%
Ecuador	0.2	-42%
Mexico	0.1	-36%

Source: UN Comtrade (September 2023)

Sustainability has become increasingly important and several pepper suppliers in developing countries are members of the [Sustainable Spice Initiative](#). [Nedspice](#), a large international producer of spices from the Netherlands, has also partnered with IDH (Sustainable Trade Initiative) to assist farmers to sustainably improve their farming practices. In 2021, over 2000 farmers were involved in the Nedspice Farmers Partnership

Programme in Vietnam and more than 500 farmers were Rainforest Alliance-certified. In April 2021, 311 black pepper farmers received the first Farm Sustainable Assessment (FSA) certification.

As pepper is the most common spice in Europe, it is also the spice for which organic-certified products are more easily available. Mainstream supermarkets in Western Europe often sell one or a few more organic-certified black pepper units, 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 UK, Switzerland and Germany.

Tips:

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

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

Vanilla

Vanilla is probably the world's most popular flavour. It is an important flavour in making ice cream, bakery products, chocolate products and drinks. While there is also artificial vanilla in the market, the demand for natural vanilla is likely to grow relatively fast. This is because of the strong growing demand for natural ingredients and clean labels. Demand exceeds the current supply, leaving room for new companies in the supplying countries to enter the market.

The supply of vanilla to the European market is highly concentrated. Madagascar supplies 85% of all vanilla imported by European countries.

Table 13: Top developing countries supplying vanilla to Europe

Supplying country	Export volume (tonnes)	CAGR 2018-2022
Madagascar	1,440	+7.7%
Papua New Guinea	87	+18%
Uganda	75	+58%
Indonesia	50	+9.0%
Comoros	16	+4.7%
India	11	+4.2%
Jamaica	8	-35%
South Africa	7	-4.0%

Source: UN Comtrade (September 2023)

France dominates European imports: in 2022 the country imported almost 900 tonnes of vanilla from developing countries. Germany imported 398 tonnes, the Netherlands 178 tonnes, Switzerland 84 tonnes, the UK 46 tonnes, and Spain and Poland both 27 tonnes. While a lot of the vanilla imported to Europe is used in production of food ingredients (flavours, etc.) and in end food products, another part is sold as consumer products.

Contrary to most other spices, vanilla is a very high-value spice. This makes it very suitable for online sales. For example, the Dutch online webshop for B2C and B2B sales of bakery supplies [Baktotaal](#) has 49 vanilla-based products in its assortment.

Organic and sustainably sourced vanilla are mostly found in organic supermarkets in Europe, such as [Bio c' Bon](#) (France), [Alnatura](#) and [Biomarkt](#) (Germany), [Ekoplaza](#) and [Odin](#) (Netherlands), and [PlanetOrganic](#) (UK). The UK ([Waitrose](#) and [Sainsbury's](#)) and Switzerland ([Coop](#) and [Migros](#)) are two countries where organic-certified and Fairtrade-certified products can be found (also as private-label products) in mainstream supermarkets too.

Tip:

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

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

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