

The European market potential for curcuma longa (turmeric)

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The trend of healthier diets is likely to positively impact the demand for spices such as curcuma longa. The Netherlands, Germany and the United Kingdom remain the main markets for Curcuma longa in Europe. However, the UK has lost its leading position in the European curcuma trade. It used to be the hub for trade, processing and distribution of this spice to other European countries, but since Brexit in 2020 this has changed considerably.

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1. Product description

Curcuma longa (also known as turmeric) is a plant native to southern Asia, where it is widely cultivated. It is now also cultivated in the Americas and in some areas of Africa with a warm and wet tropical climate. Curcuma longa production takes place mainly in the following countries:

- India
- Pakistan
- China
- Haiti
- Jamaica
- Peru
- Taiwan
- Thailand
- Indonesia
- Madagascar

The roots and rhizomes (underground stems of the plant from which the roots grow) of Curcuma longa are used in:

- Foodstuff and drinks (as a spice and as a food additive for colour and flavour)
- Health products
- Cosmetics

Curcuma longa is available as several types of products on the European market. Food-grade powder (which has about 60-80 mesh particle size), powder capsules and high-potency tablets are the most common. Fresh rhizomes are also on the market for use in cooking.

Rhizomes are collected, boiled, dried and ground to make a yellow crude powder. This powder is also used to create an extract, which can be standardised on curcumin content, usually 93-95%. Such extractions can be

used in capsules or tablets. High-potency extract tablets often contain piperine (black pepper extract) to improve the bioavailability of *Curcuma longa*.

Since curcuminoids, the colour components of *Curcuma longa*, deteriorate with light, it is important that ground turmeric and products such as capsules and tablets are packed in UV-protective packaging and stored appropriately.

This study focuses on food-grade *Curcuma longa*, predominantly applied as a food or culinary ingredient. *Curcuma longa* powder is a major ingredient in curry powders and pastes. It is also frequently used to colour and flavour products such as mustard, cheese, processed meats, soups, sauces and dry seasonings. Within the Combined Nomenclature (CN) classification, *Curcuma longa* is covered under the code 0910.3000: Turmeric 'curcuma'.

Where this study refers to 'Europe', this should be understood to include the 27 member states of the European Union plus the United Kingdom, Switzerland and Norway.

Tips:

See [Turmeric World](#) for more information on the composition, botany and uses of *Curcuma longa*.

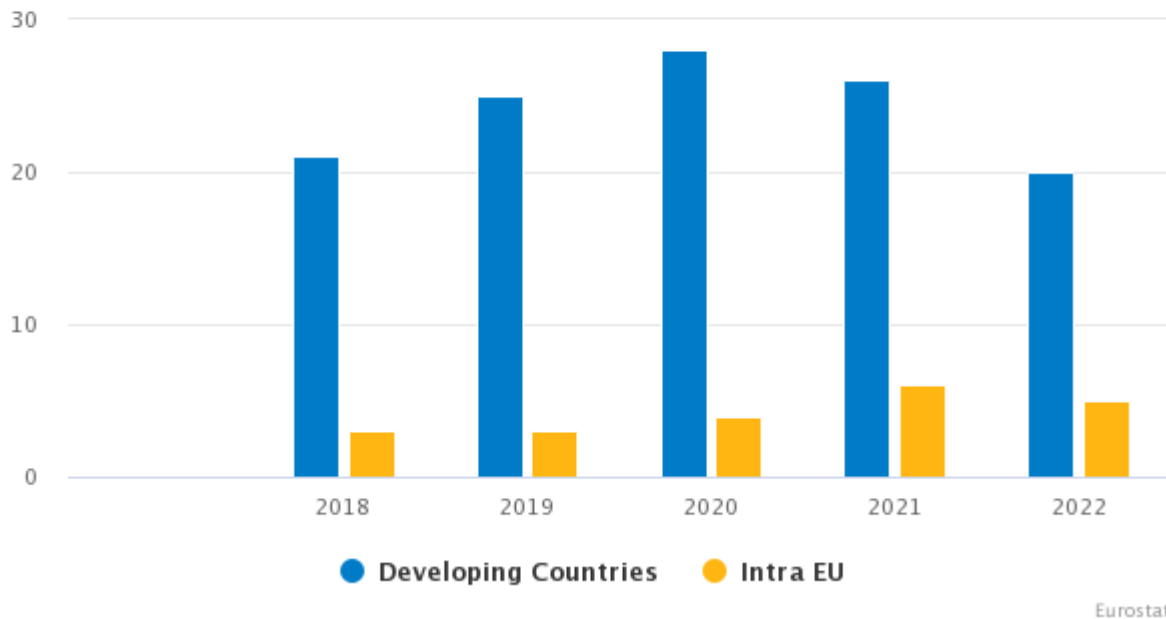
Read our study on [natural ingredients for health products](#) to learn more about the opportunities for *Curcuma longa* in this market.

2. What makes Europe an interesting market for *curcuma longa*?

European consumption of *Curcuma longa* is forecasted to increase at an average rate of 3-5% per year. While the European spices and herbs market is a rather mature market with growth forecasts of 0-2% on average, the forecast for *Curcuma longa* is more positive. This growth is mainly driven by the health benefits associated with *Curcuma longa*.

Figure 1: European imports of curcuma, by origin

in 1.000 tonnes



Source: UN Comtrade

In 2022, European imports of *Curcuma longa* totalled 26 thousand tonnes, worth €66 million. The imports decreased by 20% compared to those in 2021. In 2022, 73% of the total European imports were sourced directly from developing countries. Europe is the world's second-largest market after North America. It accounts for one-fifth of the global market.

The imports of *Curcuma longa* during the Covid-19 pandemic grew strongly. People were cooking more at home and increased their purchases of turmeric to try new recipes and replace eating out. Plus, consumers were increasingly purchasing products that promised to boost the immune system. This was one of the claims that made turmeric popular during the pandemic and [which boosted imports](#). The contraction of imports in 2022 means that consumption is returning to pre-pandemic levels.

Because *Curcuma longa* does not grow in Europe, demand must be met by imports. This also means that the European supplies in Figure 1 are all re-exports of *Curcuma longa* originally coming from developing countries. These European re-exports accounted for 25% of total imports in 2022.

3. Which European countries offer the most opportunities for *Curcuma longa*?

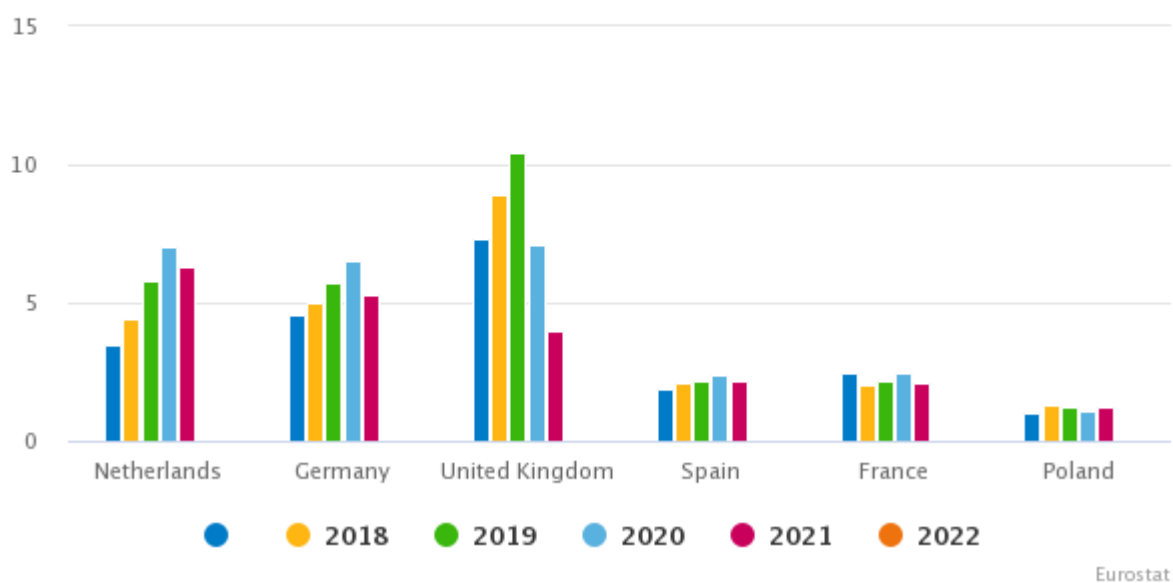
In 2020, the United Kingdom remained Europe's main market for curcuma, accounting for 32% of all imports, followed by the Netherlands (20%), Germany (17%), France (7%), Spain (7%), and Poland (4%). The applications in all of these countries are more or less the same. The key reason why the UK is the #1 importer, is the fact that the largest diaspora of South Asians lives in the UK. South Asians are used to eating curries in which curcuma is a key ingredient. The Netherlands' second position in terms of imports is mainly due to the country's role as a spice trader within Europe. This is reflected in the rise of Dutch exports of *curcuma longa*, which grew an average of 12% each year between 2016 and 2020. Germany ranks number three due to its market size and consumer behaviour. Germany is one of the largest food markets in Europe and, on top of that, two important trends affecting the consumption of *curcuma longa* are very pronounced in this market. On the one hand, consumers are increasingly interested in buying healthy products, and on the other hand, the consumption of ethnic foods, like curries, is growing.

Smaller countries representing less than 5% of the European market, but that were fast-growing importers of curcuma longa between 2016 to 2020, include:

- Austria (market share: 1.9%; growth 18%)
- Switzerland (1.0% / 11%)

Figure 2: Leading importing countries of curcuma in Europe

in 1.000 tonnes



Source: UN Comtrade

In 2022, the Netherlands and Germany were the two leading importing countries in Europe. Each country held a share of 24%, and together both countries account for nearly half the European import market. They are followed by the United Kingdom (16%), Spain (8.5%), France (8.2%) and Poland (4.7%). The applications of Curcuma longa in all these countries are about the same.

The Netherlands' first position in terms of imports is mainly due to the country's role as a spice trader within Europe. Germany ranks number 2 due to its food market size (one of the largest in Europe) and consumer behaviour. Additionally, two important trends affecting the consumption of Curcuma longa are very pronounced in this market: on the one hand, consumers are increasingly interested in buying healthy products, on the other hand consumption of ethnic foods like curries is growing.

The UK took third place in 2022, after having long-dominated the European market. The UK used to be the leading trade hub for Curcuma longa in Europe, with a strongly developed processing industry of curries and other applications. However, due to Brexit in 2020, several companies relocated their imports and production operations (whether their own or subcontracted) to other European countries, most importantly the Netherlands. This explains the very sharp decline of imports to the UK.

The Netherlands: trade hub that benefited from Brexit

Imports of Curcuma longa from the Netherlands reached 6.3 tonnes in 2022 and an average yearly growth of 15.7% between 2018 and 2022. A big portion of these imports is re-exported. Dutch exports of Curcuma longa reached almost 4.0 thousand tonnes in 2022, which represents 63% of the country's imports. This share has decreased in recent years due to the pandemic. For instance, it reached 73% in 2018 but dropped to 55% in 2020. This indicates that more Curcuma longa imported to the Netherlands stays in the country for local

processing and consumption.

While the pandemic has interfered with the trading activities of some Dutch exporters, which has in turn affected exports of turmeric, the Netherlands is also the country that has benefited the most from Brexit. Part of the trading and processing of *Curcuma longa* which previously took place in the United Kingdom has been relocated to the Netherlands.

The Netherlands' leading export destinations are all European countries. Germany was by far the largest with 1,238 tonnes in 2022 and a share of 31%, followed by France (425 tonnes), Spain (285 tonnes) and Belgium (224 tonnes).

In 2022, India was the Netherlands' leading supplier with almost 2,942 tonnes and a share of imports exceeding 47%. Peru was the second-largest (over 1,445 tonnes and a share of 23%), followed by Germany (700 tonnes and a share of 11%)

The Netherlands seems to be open to new opportunities and new supplying countries, as several countries are exporting small quantities of *Curcuma longa* to this market. For example, Dutch imports from Thailand tripled to 172 tonnes in 2022. Other countries exporting *Curcuma longa* to the Netherlands are Costa Rica (a new supplier since 2017) with 145 tonnes and Belgium with 130 tonnes.

Germany: consumer health consciousness driving growth

In 2022 German imports of *Curcuma longa* reached 5.2 thousand tonnes, evidencing an average annual growth of 3.8% between 2018 and 2022; 77% of the import volume came from India (4.0 thousand tonnes), Germany's leading supplier by far; 7.5% (390 tonnes) came from Peru; 4% from Madagascar (210 tonnes); 3.9% from the Netherlands (205 tonnes); 2% from Spain (102 tonnes); and 1.7% from Costa Rica (91 tonnes).

Germany's position as the second-largest importer of *Curcuma longa* can be explained by the country's market size. German consumers are very health-conscious, and the market for healthy foods is booming. The COVID-19 pandemic stimulated sales of products that are perceived as helpful for boosting the immune system. This claim is often attributed to *Curcuma longa*.

Germany and Switzerland are the most important markets for organic-certified spices, including *Curcuma longa*. In Germany, organic-certified *Curcuma longa* is often seen in trendy healthy products like shots to boost the immune system. It is also often sold as a standalone spice and advertised as a health-boosting ingredient. However, this doesn't mean that organic volumes are significant; the volumes are still small, but growth is higher than that of the conventional spices market.

Figure 3: *Curcuma longa* and ginger shot from German brand Kloster Kitchen

Source: Kloster Kitchen YouTube Channel

Germany is also the second largest market in the world for Fair Trade products, and offers opportunities for Fair Trade-certified *Curcuma longa*. [Weltpartner](#) is a key importer of Fair Trade products in Germany, which has *Curcuma longa* as a standalone product in its assortment. Other companies dealing with Fairtrade certified *Curcuma longa* are [KarmaKollektiv GMBH](#) and [Soul Spice](#). Nevertheless, the presence of Fairtrade certified *Curcuma longa* in the German market is very small, compared to the organic market.

Other developing countries with exports surpassing 20 tonnes in 2022 were Indonesia (32 tonnes) and Myanmar (31 tonnes). Countries like Nepal, Vietnam, Pakistan and Iran also supply small volumes to Germany. This shows that Germany's supply of *Curcuma longa* is quite diversified – much more than, for example, the UK. As such, this market may offer opportunities for small supplying countries of *Curcuma longa*.

Germany re-exports 33% of its *Curcuma longa* import volume, primarily to other European countries. Germany's neighbouring countries are the leading destinations: Poland with a share of 26%, Austria with 16% and France with 7%.

The United Kingdom: driving the traditional market for *Curcuma longa* in Europe

The UK imported 4 thousand tonnes of *Curcuma longa* in 2022. Imports of this product have been decreasing by 14% on average every year since 2018.

The role of the UK as Europe's leading trade and processing hub for *Curcuma longa* has changed drastically over the last three years. The country's *Curcuma longa* imports dropped from over 10 thousand tonnes in 2020 to only 4.0 thousand tonnes in 2022.

Similar to the rest of Europe, imports of *Curcuma longa* in the UK rose strongly during the pandemic as people were cooking at home more often. At the same time, consumers were purchasing more turmeric for its health benefits. After the pandemic, demand levels of *Curcuma longa* returned to normal, which meant a decline in imports.

On the other hand, the Brexit has created [extra difficulties for British companies to export to other EU countries](#), affecting exports of Curcuma longa. With a lower export demand, processors and traders in the UK reduced imports of Curcuma longa as raw material.

The UK's export volume of 347 tonnes in 2022 was relatively low, at only 8.8% of imports. Leading export destinations were the Netherlands (163 tonnes), Ireland (77 tonnes), France (45 tonnes) and Germany (14 tonnes). The 2022 export volume of 347 tonnes was significantly lower than in the two previous years (909 tonnes in 2020 and 554 tonnes in 2021)

The United Kingdom has the largest diaspora of South Asians in Europe. The country is home to 1.4 million Indians, 1.1 million Pakistani, and 450,000 Bangladeshi. Curcuma longa is a fundamental ingredient in traditional dishes from these countries, including curries and other spicy food preparations.

In the UK, South Asian entrepreneurs have developed a good supply chain for products of South Asian origin destined for the ethnic South Asian population. This also applies for spices from India, including Curcuma longa. Most of the Curcuma longa is blended with other spices to make curry mixes and pastes and sold as such in supermarkets. Standalone Curcuma longa powders are also available in the retail market for consumers who wish to create their own spice mixes.

In 2020, the UK was still the leading importer of Curcuma longa in Europe. This reflects the increasing popularity of the spice as a food ingredient, but also as a supplement. The use of Curcuma longa in food preparations like curries is very popular in the market. Its use in trendy beverages like 'Golden Milk' – which is prepared with milk and Curcuma longa – has also boosted demand for this ingredient.

Over 90% (!) of the Curcuma longa entering the United Kingdom is imported directly from India. Spain is the second-largest supplier with a relatively small share of 3.4%, followed by the Netherlands (1.5%), Peru (1.1%), and the USA (1%). Other emerging exporters supplying small quantities in 2022 are Indonesia (34 tonnes), Thailand (19 tonnes) and Madagascar (12 tonnes).

Last but not least, it should be noted that the UK is the largest market for Fairtrade-certified products. This offers opportunities for Fairtrade-certified Curcuma longa exporters. Some importers of Fairtrade Curcuma longa in the UK are [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 has specialised in organic and Fairtrade-certified spices.

The herbal tea brand [Pukka Herbs](#) also stands out for its organic and fair trade-certified ingredients, including turmeric.

Tip:

Find potential buyers of Fairtrade-certified Curcuma longa through the [Fairtrade website](#).

Spain: a growing market for Curcuma longa

Spanish Curcuma longa imports reached 2.2 thousand tons in 2022 and showed a 3.8% average yearly growth between 2018 and 2022. An important and growing application of Curcuma longa is its use as a colourant in the popular Spanish dish, paella, instead of the relatively expensive saffron.

In 2022, India was by far Spain's main supplier with 1.5 thousand tonnes and a share of 69%; this was followed by Peru (411 tonnes and a share of 19%); the Netherlands (134 tonnes and a share of 6.2%); Myanmar (33

tonnes and a share of 1.5%) and Germany (30 tonnes and a share of 1.4%)

Spain is an important supplier and re-exporter of turmeric within Europe, with 51% of Spanish imports of *Curcuma longa* finding their way to a long list of European countries. France tops the list (440 tonnes with a share of 40%), followed by the United Kingdom (123 tonnes and a share of 11%) and Italy (92 tonnes and a share of 8.4%).

As the Spanish supply is less diversified than that of other European countries, Spain does not seem to be among the most interesting countries for new entrants, unless they are based in one of the established supplying countries: Peru, Myanmar and Vietnam.

France: import volumes remain stable

The French import volume of *Curcuma longa* reached 2.0 thousand tonnes in 2022. These imports have been decreasing by 4.8% on average every year since 2018. Like in all European countries, India is the top supplier, with a share of 55% in 2022. Other direct imports came from Spain (291 tonnes), the Netherlands (240 tonnes), Madagascar (112 tonnes), Germany (106 tonnes) and Belgium (90 tonnes).

France is not an important trade hub for turmeric. Exports are certainly there, but compared to imports they are limited. France's curcuma export volume of 396 tonnes amounts to 20% of the import volume. Export destinations are virtually only European countries. The UK represents almost a third of French exports, while the rest go to Switzerland, Spain, Austria, Belgium and the Netherlands.

France is the second-largest market for organic food in Europe after Germany, which offers opportunities for exporters of organic-certified turmeric. The French company [Albert Ménès](#), for example, sells organic turmeric.

Poland: the main market in Eastern Europe

Poland experienced a positive trend in its *Curcuma longa* imports from 2018 to 2022, growing from 986 tonnes in 2018 to 1.2 thousand tonnes in 2022 – an average yearly growth of 5%. Polish imports of *Curcuma longa* had already reached 1.2 thousand tonnes in 2019 and 2020 but fell to one thousand in 2021. Polish imports thus seem to be stable since 2019.

More than 87% of Polish *Curcuma longa* imports came from India (1.0 thousand tonnes), followed by Peru with a share of 5.8% (69 tonnes) and the Netherlands with a share of 2.4% (28 tonnes).

Poland exported 204 tonnes of *Curcuma longa* in 2022, amounting to 17% of the import volume in that year. The main destinations were Germany (32 tonnes), Slovakia (32 tonnes), Czechia (29 tonnes), the Russian Federation (27 tonnes) and Romania (21 tonnes).

The other 83% of imports were destined for the local spices market and for manufacturing products like sauces and pastes. For example, two major European brands of sauces and pastes, Blue Dragon and Patak's, owned by the British company AB World Foods, are manufactured in Poland. They use a lot of *Curcuma longa*.

Tips:

Check the latest developments on [ITC Trademap](#) or the [Indian Spices Board](#). ITC Trademap offers details of trade volumes and values, per year and per importing and exporting country. The Indian Spices Board's data predominantly cover details of Indian production and exports.

Target leading Western European importing countries of *Curcuma longa* from developing countries. The most interesting are the Netherlands, Germany, the United Kingdom and France, while Poland could also be interesting.

Also consider targeting smaller, fast-growing importers of *Curcuma longa*, most notably Austria and

Belgium. Although their import volumes are smaller, they may be interesting enough to focus on for small to medium-sized exporters, as volumes would still be substantial for them.

4. Which trends offer opportunities or pose trends on the European Curcuma longa market?

The trends that are explained below are visible all over Europe. At the same time, the wealthier a country is, the more impact these trends have on the food and spices market. This means that the markets in Western Europe – namely the Netherlands, Germany, the United Kingdom and France – are most affected by the following trends. In Spain, the impact of these trends can be rated as medium, while in Poland it is still low.

Changing dietary preferences of consumers to boost the Curcuma longa market

Health has become a top priority for customers around the world. In recent years, particularly since the COVID-19 pandemic, there has been a substantial increase in demand for natural products that promise benefits to the immune system, [including Curcuma longa](#).

Consumers are becoming increasingly aware of the negative effects of overconsumption of animal products. Their dietary preferences are changing as they switch to plant-based foods, including natural seasonings. This is one of the major factors expected to boost Curcuma longa consumption.

This trend has resulted in:

- Growing consumption of so-called 'superfoods': superfoods are ingredients that are believed to have a particular benefit or significant benefits compared to other foods, and Curcuma longa is one of them. In particular [Peru is using the term Superfoods](#) to promote the country's large range of healthy ingredients, including Curcuma longa.
- The popularity of Ayurveda in Western Europe: consumers are becoming increasingly interested in alternative medicine. Ayurveda has gained a lot of popularity, along with yoga and meditation. Curcuma longa is widely used in Ayurvedic preparations and Ayurveda-inspired herbal mixes. An example is Golden Milk, containing vegetable milk and Curcuma longa, which has become popular among health-conscious consumers. This drink is both prepared at home and widely available in trendy cafés in major European cities.
- Adding Curcuma longa to special diets (such as the chrono, paleo and keto diets) is promoted to reduce inflammation, boost mood, reduce blood sugar, improve heart health and inhibit tumour growth.
- Complementing a healthy diet with beverages, shakes or shots: in addition to eating healthy foods, many health-conscious consumers are trying to boost their health and wellbeing by increasing their intake of superfoods. Shots of Curcuma longa, sold in small bottles as a convenience product, are a good example of this trend. They can be consumed any time of day. Some people also add a curcuma-containing drink or shake to some of their meals, or consume it before or after working out.

Figure 4: Curcuma shot



Source: PLANT profile at Unsplash

In line with health trends and the many health claims associated with *Curcuma longa*, manufacturers are increasingly launching teas and powder shakes containing the spice, to complement a healthy diet. Therefore, the use of *Curcuma longa* has expanded from a clean additive to a superfood. This trend is likely to remain the leading driver of food market developments in the next decades and will positively impact demand for spices such as *Curcuma longa*.

Very often, new products that are being advertised as healthy are organic-certified. This is because consumers interested in optimising their health with specialty products also prefer organic over conventional products. Therefore, companies selling this type of product might require organic-certified *Curcuma longa*.

Figure 5: Curcuma mix for Golden Milk from Ankerkraut

Source: Ankerkraut YouTube Channel

- Change to organic agriculture to benefit more from the health-boosting trend.

Consumers looking for cleaner labels

Curcuma longa is a natural yellow colouring additive, which can be used instead of other colourants that might be perceived as chemical or unhealthy. The food industry increasingly uses it to colour products like cheese, mustard, butter, yellow cake mixes and popcorn.

Innovative uses for Curcuma longa as a colourant in the food industry include:

- Non-dairy milk: The rise in popularity of non-dairy milks such as almond milk and soy milk comes with a demand for natural colourants to replace the synthetic ones used in these products. Curcuma longa can be used for a yellowish tint.
- Plant-based meat alternatives: Plant-based meat alternatives, such as veggie burgers and vegan sausages, are gaining popularity. Curcuma longa can be used to give these products a more realistic meat-like colour.
- Beverages: Curcuma longa can be used as a natural colourant in beverages such as teas, juices and smoothies, giving them a bright yellow-orange colour. This can be particularly appealing for consumers looking for natural, healthy beverages.
- Snack foods: Curcuma longa can be used as a natural colourant in snack foods such as potato chips, giving them a bright, eye-catching colour. This can help these products stand out on store shelves and appeal to consumers looking for natural ingredients. An example are the potato chips with turmeric of the Spanish brand [Nadur](#).

Growing market for international food, both in- and outside the home

European consumers are increasingly interested in trying new food preparations and discovering new flavours, cuisines and exotic products, both in restaurants and at home. The COVID-19 pandemic temporarily put an end to restaurant visits in 2020 and 2021, but at the same time also boosted the consumption of exotic foods at home.

Some developments that have added to this trend are:

- An increase in global relations and communications. In the past decade, more Europeans travelled to Asian destinations and more foreigners came to Europe. Due to the pandemic, people travelled less in 2020 but also tried to compensate for that by cooking exotic dishes at home that reminded them of previous holidays. After the pandemic, consumers started travelling again, but some of the new recipes have become part of the home-cooking repertoire.
- The ongoing popularity of TV cooking programmes like [Master Chef](#) and other cooking series that encourage home cooking and experimentation with different products.
- The growth of the ethnic food market across Europe. The spice Curcuma longa is used in nearly every Indian dish and other Asian cuisines. Indian and other Asian foods play an important role in gastronomy in Europe, thus stimulating the imports of Curcuma longa to Europe.

Growing demand for organic certified turmeric

The overall market for organic products is growing, including processed products that might need organic-certified ingredients like Curcuma longa. Consumers looking for Curcuma longa as a health booster might prefer the organic version. As a result, a sizeable portion of the new launches of healthy products in the market with Curcuma longa as superfoods consist of organic-certified products.

Because of these trends, the organic Curcuma longa market is forecasted to grow faster than the conventional Curcuma longa market. This is especially important for new suppliers with small quantities who are interested in entering the European market and who have the option of offering organic-certified Curcuma longa.

One of the companies that has benefited from the strong organic market growth is [La Campiña](#), a farmer's cooperative of organic-certified farmers in Peru. This company has contributed very strongly to Peru's successful export expansion strategy for the superfood curcuma. La Campiña offers Curcuma longa in several forms, including the fresh root, juice and dried pieces, and powder, juice and powder.

A key aspect of La Campiña's success is their certifications. This company offers organic-certified products but also enjoys other highly valued certifications like Global Gap, Grasp, Demeter and Fair Trade. This allows them to sell to a wide range of clients, from supermarkets to niche companies willing to pay more for a Fair Trade or Demeter product.

Tips:

Find a way to better promote your country's turmeric, also taking into account their health benefits. This should be coordinated by your national association. Also learn from best practices in the sector, most notably Peru's sector branding strategy.

Check whether there is sufficient demand for an organic version of your Curcuma longa. Talk to your (potential) buyers to see whether they are interested in certified Curcuma longa. Look for companies that trade in certified Curcuma longa online or at trade fairs, for example among exhibitors at [Biofach](#), an organic trade fair, or look for organic importers on the [website of the International Trade Centre](#).

If your Curcuma longa does not have organic certification, promote the sustainable aspects of your production process. Buyers might ask you to support your claims with certification or documentation on your sourcing practices and/or your corporate social responsibility (CSR) practices. Our [requirements for spices and herbs](#) study provides you with more information on certification standards.

See our study on [Exporting Curcuma longa as a natural ingredient for health products to Europe](#) for more information on trends related to health and superfoods.

Be careful how you frame the superfood status of your Curcuma longa in your marketing materials. The term 'superfood' is not an authorised health claim in Europe. European companies may only use this term on their label if it is part of their brand name.

This study was carried out on behalf of CBI by [Autentika Global](#) and updated by [Globally Cool](#).

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