

Entering the European market for curcuma longa (turmeric)

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There is a strong and growing demand for Curcuma longa in Europe. But competition is fierce, especially from India. Therefore, scale of production and processing is important to enter the market. While India is by far the largest supplier, in the last decade some other supplying countries have gained a position in the European market – especially Peru, which is successfully promoting Curcuma longa under the umbrella of 'Superfood from Peru'. Another 'newcomer' is Madagascar, although its market share is still small.

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1. What requirements should Curcuma longa comply with to be allowed on the European market?

You must comply with several mandatory (legal) requirements to enter the European market. Buyers will likely have additional requirements, and they may ask for certifications. Mandatory requirements for turmeric in Europe have a strong focus on consumer health and safety, while sustainability requirements are also becoming increasingly important.

What are mandatory requirements?

Most mandatory requirements related to curcuma longa relate to food safety. The [European Commission for Health and Food Safety](#) is responsible for the European Union's policy and for monitoring the implementation of related laws.

Official food controls

Food imported into the European Union (EU) is subject to official food controls. Non-compliance with [European food legislation](#) is reported via the [Rapid Alert System for Food and Feed \(RASFF\)](#). In 2022, four cases related to Curcuma longa were reported in RASFF. Only one involved curcuma powder, the other three were about supplements. Since 2020, a total of 11 cases have been reported for curcuma powder.

If imports of Curcuma longa from a specific country repeatedly show non-compliance with European food legislation, the frequency of official controls at the border is increased. There are two countries that face such increased frequency of official controls for Curcuma longa: Ethiopia and India.

For Ethiopia, the frequency is 50% and the hazard is aflatoxins. For India, 20% of the consignments are tested for pesticide residues. Both requirements are very strict: this rule already applies to consignments of mixed produce in which 20% of the quantity is Curcuma longa. The origin does not matter either. Even if the Curcuma

longa comes from other countries, but other ingredients are of Ethiopian or Indian origin, the increased frequency still applies.

Tip:

Search the [RASFF](#) database for examples of withdrawals from the European market.

Pesticide residues

The EU [regulation on Maximum Residue Levels of pesticides](#) sets maximum residue levels (MRLs) for pesticides in or on food products. Products containing more pesticide residues than allowed are withdrawn from the European market.

Excessive pesticide residues are not very common for *Curcuma longa*. In 2022, one issue related to excessive pesticide levels was reported in RASFF. Excessive levels of chlorpyrifos residues (the MRL is 0.01 mg/kg) are the main reason for border rejections of *Curcuma longa*. Since 2020, a few other cases have been reported on pesticide residues. These reports took place in 2021, when a few consignments from India had excessive levels of ethylene oxide (the MRL is also 0.01 mg/kg).

Tip:

Select your product or the pesticide you use in the [EU pesticide database](#) for a list of relevant MRLs.

Contaminants control in *Curcuma longa*

Food contaminants are substances that have not been intentionally added to food. They may be present in turmeric as a result of the various stages of production, packaging, transport or holding, or environmental contamination. Contaminants can pose a health risk to consumers. To minimise these risks, the EU has set [maximum levels for certain contaminants](#) in foodstuffs:

- Microbiological contaminants: The EU regulation on [microbiological criteria for foodstuffs](#) does not set some limits for microbiological contaminants for spices, including turmeric. The most important contaminant is salmonella and must be completely absent. Since January 2020, only [one issue was reported in the RASFF database related to salmonella](#).
- Mycotoxins: There are limits applying to *Curcuma longa*. The maximum level of aflatoxin is 5 µg/kg for aflatoxin B1 and 10 µg/kg for total aflatoxin content (B1, B2, G1 and G2). For ochratoxin A, a maximum level of 15 µg/kg is in place. Between January 2020 and May 2023, two out of 11 reported cases in RASFF for *Curcuma longa* related to aflatoxin.
- Metal contaminants: Since 2021, the EU has lead residue limits. For turmeric this limit is 1.5 mg/kg.

While EU legislation does not define maximum levels for microbiological contamination (with a few exceptions, such as salmonella), different national legislation on aflatoxins may apply.

Tips:

Check the national legislation in your target countries through the [My Trade Assistant tool](#) at

[EUAccess2markets](#) to see if country-specific legislation for *Curcuma longa* is in place.

Comply with the Codex Alimentarius [Code of Hygienic Practice for Low Moisture Food](#) (CXC 75-215) and the International Organization of Spice Trade Associations' General Guideline for [Good Agricultural Practices on Spices and Culinary Herbs](#) to prevent microbiological contamination.

Consider heat sterilisation as a natural, chemical- and radiation-free option. Since heat sterilisation equipment is rather expensive, it might be interesting to use a third party.

Labelling requirements

Each export package should declare:

- Name of product, in this case '*Curcuma longa*'
- Batch code
- Net weight in metric system
- Shelf life of the product or best before date, and recommended storage conditions.
- Lot identification number
- Country of origin and name and address of the manufacturer, packer, distributor or importer

The lot identification and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark. A label can also include details such as brand, drying method and harvest date. These batch details can also be included in the Product Data Sheet (also called a Technical Data Sheet, Product Specification Sheet, or something similar). This document contains the specific characteristics of your product, which your buyer will ask for to assess it. Check out this example for [organic *Curcuma longa*](#).

In the case of consumer packaging, product labelling must comply with the [EU Regulation on the provision of food information to consumers](#). This regulation defines nutrition labelling, origin labelling, allergen labelling and minimum font size for mandatory information.

If you supply organic *Curcuma longa*, your label needs to include the name/code of the inspection body and certification number.

Tip:

Check out our study on the [requirements for spices and herbs](#) for more information on consumer packaging and labelling.

What additional requirements and certifications do buyers often have?

European buyers often have additional requirements, beyond legal obligations. These often concern the European Spice Association's (ESA) quality minima for spices. Others relate to food safety and to sustainable and ethical business practices.

Quality requirements for *Curcuma longa*

Several factors determine the quality of *Curcuma longa*, some as subjective as taste or flavour. The most common parameters for *Curcuma longa* quality are listed in ESA's [Quality Minima Document](#). This document

specifies the chemical and physical parameters that *Curcuma longa* needs to comply with when sold in Europe.

Whole:

- ash: maximum 8%
- acid insoluble ash: maximum 2%
- moisture: maximum 12%
- volatile (essential) oil: minimum 2.5 ml/100 gr

Ground:

- ash: maximum 9%
- acid insoluble ash: maximum 2.5%
- moisture: maximum 10%
- volatile (essential) oil: minimum 1.5 ml/100 gr

In terms of cleanliness or purity, ESA has not developed very detailed specifications. The ESA standard does not allow the presence of any foreign objects greater than 2mm in diameter and proposes that the maximum presence of external matter should be below 1% of the weight. Because of this, European buyers often use the specifications for cleanliness established by the [American Spice Trade Association \(ASTA\)](#).

ISO is also working on standards for spices and herbs. This work takes place in [ISO's Technical Committee #34/SC 7](#). This committee develops standards for spices, culinary herbs and condiments. Their webpage offers an overview of which standards the committee is working on. Working Group 10 is developing an ISO standard for *Curcuma longa*.

Packaging requirements

For shipping, bulk *Curcuma longa* should be packaged in PE-woven bags of 20 to 25 kg.

Curcuma longa is packed in food-approved, multi-wall laminated bags of different weights ranging from 1 to 25 kg. Common weight classes are 12.5 kg and 25 kg. Please note that in some European countries, labour health and safety legislation allows workers to lift a maximum of 20 kg. This is why smaller weights of packaging are increasingly being used, such as 10-20 kg.

The net weight of retail packaging is usually between 20 g and 40 g. Retail packaging includes glass containers, plastic bags, plastic containers and paper bags. Transparent glass containers are particularly popular, as they allow consumers to see and visually inspect the product before buying.

Food safety certification

Food safety is essential for the European market. While legislation already prevents many risks, it isn't sufficient. For that reason, importers prefer to work with producers and exporters who have a [Global Food Safety Initiative](#) (GFSI) recognised food safety system certificate.

Among big processors and traders, the most popular certification programmes are:

- [Food Safety System Certification](#) (FSSC 22000) is the most important certification program and gives access to almost all countries worldwide.
- [International Featured Standards](#) (IFS) can be relevant if European buyers ask for it.
- [British Retail Consortium Global Standards](#) (BRCGS) can be relevant if European buyers ask for it.

Such a third-party certified programme is an asset to your company and is appreciated by new buyers. Nevertheless, serious buyers might also visit and/or audit the production facilities of new suppliers.

Sustainability compliance

Although less important than product and food safety requirements, social and environmental compliance is increasingly demanded by European buyers. This often means that the supplier must undersign the buyer's code of conduct. Another possibility is that buyers ask for certification against a third-party scheme such as Rainforest Alliance.

Codes of conduct) vary from company to company, but they are often similar in structure and the issues they cover. In 2022, ESA published a guideline for their members. Since many European spices and herbs companies are members of ESA, you will likely come across this guideline sooner or later.

Under this [sustainability code of conduct](#), ESA's members shall monitor their own and their suppliers' operations.

Tips:

Ask your buyer for their specific product requirements. Especially large customers ask for specific product analysis and have their own Product Data Sheets (PDS) that your product should match.

Always ask your buyer for their specific packaging requirements. Your buyer can help you comply with the regulation by indicating a type of packaging. They might also have specific requirements that go beyond regulation.

Use methods of analysis and sampling recommended by ESA from Appendix 2 of the [Quality Minima Document](#), to determine quality parameters for *Curcuma longa*.

Read more about payment and delivery terms in the [CBI Tips for organising your spices and herbs exports](#) to Europe.

Make sure that the materials that you use for packaging are impermeable to moisture and air. Sealing machines can be used to seal the bags.

What are the requirements for niche markets?

Most additional buyer requirements apply to the mainstream *Curcuma longa* market. However, some niche markets have their own, specific requirements. While Fairtrade lays down requirements for sustainability in the social, environmental and ethical domains, product certification for the organic market mainly focuses on environmental requirements.

Organic certification

If you want to sell your *Curcuma longa* as organic in Europe, it must be grown using organic production methods that comply with [EU organic legislation](#). Growing and processing facilities must be audited by an accredited certifier.

Fairtrade

The fairtrade market is built on fairtrade certification. Each player in the supply chain needs to be certified to participate in this market. The fairtrade market is privately regulated.

[Fairtrade International](#) has a specific [standard for herbs, herbal teas and spices](#) from small-scale producer organisations, which applies for turmeric. This defines [minimum prices and price premiums](#) for conventional and organic products from several countries and regions. For *Curcuma longa*, Fairtrade Minimum Price equals the

commercial price and the Fairtrade Premium is set at 15% of the commercial price, except for *Curcuma longa* from India and Sri Lanka, which have a Fairtrade Minimum Price of €0.21 per kg and a Fairtrade Premium of €0.03 per kg.

There are currently (as of May 2023) 12 [Fairtrade-certified *Curcuma longa* producers](#) in India (of which one also has a trade function), five in Peru, three in Thailand, two in Madagascar and one in Costa Rica. India also has the most fairtrade-certified companies with other functions (traders, processors and intermediate product distributors). Thailand likewise has several types of fairtrade-certified companies that work with *Curcuma longa*. Peru only has a few fairtrade certified traders, while Costa Rica has one fairtrade certified trader and one processor.

Figure 1: Pukka Herbs becomes Fair for Life certified

Source: Pukka Herbs YouTube Channel

Dual certification

Having both organic and Fairtrade certification is a clear asset for consumers looking for sustainable products. These consumers are looking to support both the growers and the environment, so they are more likely to appreciate and buy products that have both certification logos.

Tips:

Read [CBI's study on requirements for exporting spices and herbs to the European market](#) for a complete overview of requirements, including organic and fairtrade certification.

Check the [guidelines for imports of organic products into the EU](#) to familiarise yourself with the requirements for European traders.

Consult ITC [Standards Map](#) for a full overview of relevant certification schemes and their requirements.

Check Fairtrade International's [standard for herbs, herbal teas and spices](#) and other [Fair Trade Standards](#) relevant to your production, processing and trade.

Try to combine organic certification with other sustainable initiatives (dual certification) to increase your competitiveness.

2. Through what channels can you get *Curcuma longa* on the European market?

The European food industry uses *Curcuma longa* in significant quantities, especially as a part of curry powder. Curry powder is a mix of several spices and *Curcuma longa* is responsible for the yellowish colour. Curry powder is used as a spice mix for products like meat, sauces, soups and ready meals. *Curcuma longa* is also used in the Moroccan spice mix Ras-El-Hanout and the Iranian mix Advieh. Also, *Curcuma longa* is used to colour food products such as cheese, mustard, butter or margarine, and cake mixes.

The largest user of *Curcuma longa* in Europe is the food processing industry, followed by retail, foodservice and food ingredients (additive segments).

How is the end-market segmented?

Figure 2: End market segments for *Curcuma longa* in Europe



Source: CBI

Food processing

The food-processing segment is roughly estimated to use 60-70% of all *Curcuma longa* in Europe. The largest users within the food-processing segment include spice mixture producers, the meat industry and the sauces and seasonings industry.

Spice mixture producers are companies specialised in the production of spices and seasonings for different applications, including turmeric. Those companies are constantly investing in research to develop custom formulations for food processing companies and help launch new attractive tastes. They produce either dried or liquid spice ingredients. Some examples of such companies in Europe are [AVO](#), [Meat Cracks](#), [Kerry Ingredients](#), [Futarom](#) (part of IFF), [Farevelli Group](#), [Food Ingredients Group](#), [Kalsec](#), [EHL Ingredients](#) and [EHL Ingredients](#)

The meat industry is an important user of *Curcuma longa*, very often not supplied directly but through spice and food ingredient companies. However, larger groups of companies may import *Curcuma longa* directly. One such group is [OSI Food Solutions](#). Mostly, the *Curcuma longa* is part of a customised mixture to spice chicken meat.

The European sauces and condiments industry is also an important user of *Curcuma longa*. However, this market is dominated by international brands such as Kraft Heinz, McCormick, and Maggi (Nestle).

Retail

The retail and food-service segments for turmeric are dominated by European (often national) spice brands/companies, such as [Fuchs](#) in Germany, [Verstegen](#) and [Euroma](#) in the Netherlands, [Santa Maria](#)

(Scandinavian countries) and multinational brands such as McCormick and Kraft Heinz. For example, the Dutch spice specialist [Silvo](#) has been part of McCormick since 2004.

Also, some strong brands are developing in South East Europe, such as [Prymat Group](#). These spice companies import turmeric directly from all over the world and have in-house processing and R&D facilities

Private-label (supermarket) brands are important as well. European spice packers and blenders conduct production for all these brands. Since supermarkets often require large quantities and have very specific requirements regarding packaging, it is very difficult to supply them directly from outside Europe. Products already packed in origin countries are mainly found in European ethnic supermarkets, open-air markets, and web shops.

The retail sector can be further segmented into supermarkets, independent grocers and specialty shops. Most retailers sell individually packed turmeric and also a range of specific mixtures. Overall, tailored mixtures are becoming more popular in the retail segment, partly due to the increasing interest in ethnic food but also due to the growing demand for convenience. Leading supermarket chains in Europe with their own private labels are [Tesco](#), [Carrefour](#), [Aldi](#), [Edeka](#), [Auchan](#) and [Albert Heijn](#).

Along with the increasing interest in ayurvedic beverages and in herbal infusions with *Curcuma longa*, manufacturers of packaged tea mixes and herbal infusions are also becoming important buyers of the spice. [Teekanne](#), [Ronnefeldt](#) and [Yogi Tea](#) are some brands offering teas and herbal infusions containing *Curcuma longa*. Companies like these sometimes import the ingredients directly from the origin, depending on the quantities needed. However, they are more likely to buy from importers in Europe.

The same goes for beverage companies that produce shots and smoothies with superfoods. Since these companies frequently only have a few products containing *Curcuma longa* as part of a much broader portfolio, they tend to buy the required quantities from traders or importers in Europe.

Finally, smaller companies offering healthy shake powders and food supplements with *Curcuma longa* are also boosting demand for this product. Companies like [Foodspring](#) or [Your Super](#), which are fairly new to the market, do not usually import *Curcuma longa* directly from the country of origin.

Food service

The foodservice channel (hotels, restaurants and catering) is usually supplied by specialised importers or wholesalers. These companies are sometimes the same as the brands that supply the retail segment. The foodservice segment often requires larger packaging sizes of *Curcuma longa*, such as cans of 300 to 500 grams or sacks of a few kg.

World cuisines, healthy food and food enjoyment are the major driving forces in the foodservice channel in Europe. The fastest-growing business types are likely to be new (healthier) fast food, street food, pop up restaurants, international cuisines and sandwich bars.

Through what channels does *Curcuma longa* land on the end-market?

Spice importers represent the most important channel for *Curcuma longa* in Europe by a long way. However, sometimes, *Curcuma longa* can be placed on the market through an agent or directly supplied to food processors or food service companies. Some wholesalers also have packing facilities and usually supply private-label turmeric.

Figure 3: Trade channels for *Curcuma longa* in Europe



Source: CBI

Importers / Wholesalers

Importers and wholesalers can be general spice importers or specialised importers. Some now exclusively deal with ingredients aimed at the food-processing industry while others pack spices and spice mixes for retail chains. Some importers also deal with a broader range of products apart from spices, such as beans, seeds, dried fruits and nuts.

An important trend is the growing pressure that retailers put on their suppliers (importers and food manufacturers). The higher requirements from retailers determine the supply chain dynamics from the top down the chain. Pressure is translated into lower prices and added value aspects such as more sustainable primary production. Transparency in the supply chain is needed. To achieve this, many importers develop their own codes of conduct and build long-lasting relationships with preferred developing country suppliers.

Examples of bulk importers of *Curcuma longa* in Europe include [Albarracin](#) (Spain), [Nedspice](#) (the Netherlands), [European Spice Services](#) (Belgium), [Husarich](#) (Germany) or [Saran Enterprises](#) (Poland).

Examples of specialised importers that are using *Curcuma longa* in different spice mixtures include [Culinar](#) (Sweden), [Epos](#) (the Netherlands; the only producer in Europe with a range of allergen-free blends), and [Colin Ingredients](#).

Examples of spice importers that are supplying several different segments include [Isfi Spices](#) (Belgium) and [Verstegen](#) (Netherlands).

Agent/broker

Brokers and agents are intermediaries who bring buyers and sellers together. They charge a commission for their services. European buyers can be trading companies, but they are mostly processors. Agents and brokers are interesting when you have a specialised product (such as high-quality or sustainably certified turmeric) for which buyers are harder to find. The role of the agent is slowly diminishing due to the increased transparency demanded by the market.

Tips:

Download the [member list](#) (PDF file) of ESA. The first pages list the several national spices associations that are ESA members. From page 2 on there is a long list of 'full member companies'. Many of these companies are dedicated spices and herbs traders and packers. The document groups these companies per European country.

Search the list of exhibitors of the specialised trade fair [Fi Europe](#). This fair is the leading event in Europe where all ingredients companies in Europe gather. It takes place every year. In the even years the FI is in Germany, in the uneven years in France.

What is the most interesting channel for you?

Spice importers seem to be the best partner for placing *Curcuma longa* on the European market. This is specifically relevant for new suppliers as supplying the retail segment directly is very demanding and requires a lot of quality and logistical investments.

However, for well-equipped and price-competitive producers, packing for private labels can be an option. Until

now, importers often do private label packing for European supermarkets. As the cost of the workforce in Europe is increasing, importers of *Curcuma longa* sometimes search for opportunities to pack in supplying countries if they can assure full traceability and quality control.

As an exporter, you can use several channels to bring your turmeric on the European market. However, you should realise that if you are unable to supply at least one container within your buyer's (short) time frame, it is unlikely that you will successfully manage to supply to the European market. If you are unable to do so, you can work together with other suppliers interested in supplying to the European market.

Tips:

See our [Tips for finding buyers](#) on the European market for spices and herbs to start your search for new customers.

Benefit from the experience and knowledge of specialised European importers and agents instead of approaching manufacturers directly.

To help you enter the market, consider working with an agent or representative with a good reputation. You can look for commercial agents on the website of [Internationally United Commercial Agents and Brokers \(IUCAB\)](#).

Visit or participate in trade fairs to test whether the market is open to your product, obtain market information and find potential buyers. The most relevant trade fairs in Europe are [ANUGA](#), [SIAL SANA](#), [Health Ingredients Europe](#), [Food Ingredients Europe](#), [Biofach](#) (the main trade show for organic products) and [Vitafoods](#).

3. What competition do you face on the European *Curcuma longa* market?

India dominates the European market of *Curcuma longa* by far, with 16.4 thousand tonnes and a share of 80% of the total imports in 2022. Supplies from other countries are also entering the market, especially with organic turmeric or with whole rhizomes for the fresh produce market.

Source: UN Comtrade (2022)

Which countries are you competing with?

After India, in 2022 Peru was the second main supplier with 2.4 thousand tonnes and a share of 12% of all the imports. Madagascar exported 340 tonnes to Europe (1.7% share), Costa Rica 269 tonnes (1.3%), Vietnam 259 tonnes (1.3%) and Thailand 210 tonnes (1.0%). Other countries that exported over 50 tonnes in 2022 to Europe were Nicaragua, Indonesia, Myanmar, Pakistan and China.

India is the home of *Curcuma longa*

India is the main supplier of *Curcuma longa* to the European market. In 2022, Indian *Curcuma longa* reached more than 16 thousand tonnes with a share of 80% of the total imports. Germany is its main market, accounting for one-quarter of the imports and reaching 4.0 thousand tonnes in 2022. The United Kingdom followed with 3.6 thousand tonnes, the Netherlands with 3.0 thousand tonnes and Spain with 1.5 thousand tonnes.

Figure 5: Turmeric field in India



Source: Poul Wiertsema

There are several provinces in India where *Curcuma longa* is produced. Among the top 5 production provinces are Andhra Pradesh, Telangana, Maharashtra, Tamil Nadu, and Karnataka, although different sources might mention other lists. While India's stake in European imports is already so large that it was not shown in Figure 3 for reasons of scale, India's position as the #1 producer worldwide becomes even more obvious from the fact that only less than 10% of production output is exported.

Roughly, India accounts for 80% of global *Curcuma longa* production. India's share of global exports is somewhat lower (over 65%), as India has a huge domestic market for *Curcuma longa*. Also, India's share in world trade is declining slightly because other countries have become *Curcuma longa* exporters as well. Still, the impact is low and only has led to a few % lower share for India in world trade.

India's *Curcuma longa* is promoted as *Curcuma longa* with the highest curcumin content worldwide (which can be up to 8%). Note that India also imports *Curcuma longa* from other producing countries, chiefly from Vietnam, Indonesia, Myanmar, Djibouti, Nigeria, and Ethiopia.

The production and export of spices, including *Curcuma longa*, is monitored and supported by the [Spice Board of India](#). This is one of the most famous spice industry organisations in the world. The board organises the [World Spice Congress](#) every second year and also is responsible for the mandatory testing of turmeric before export to Europe.

Superfood *Curcuma longa* from Peru

Peru is the second largest supplier of *Curcuma longa* to Europe. In 2022, imports from Peru reached 2.4 thousand tonnes, accounting for a 9.5% share of European imports. Peruvian *Curcuma longa* production has grown quickly in the past decade, from less than 400 tonnes in 2014 to over 3,500 tonnes in 2021. The lion's share of the production is exported. Within Europe, the Netherlands is the top importer of Peruvian *Curcuma longa* exports, with a share of 59%, followed by Spain (17%), and Germany (16%).

Exports are strongly promoted and supported by the national export promotion organisation, [PromPeru](#). PromPeru has created a national brand 'Superfood from Peru' - curcuma is one of them - which is promoted at all leading international trade fairs. Peru's organic production, including of *Curcuma longa*, has also grown significantly in the last decade. As a result, Peruvian exporters of organic *Curcuma longa* have been able to participate in this growing market segment.

High curcumin content in Madagascar's *Curcuma longa*

Madagascar is a small producer of *Curcuma longa* but of high quality, based on a very high curcumin content (7.5%). It is grown on the coastal 'Centre Est' strip of the Big Island, especially in the Beforna region. This area is known for its rhizome crops to which Ginger and *Curcuma longa* also belong.

Madagascar's exports reached 340 tonnes in 2022, an increase of 34% compared with 2021 exports. All *Curcuma longa* exports from Madagascar find their way only to Germany and France, with a share of 64% and 36%, respectively.

The interruption in some supply chains caused by the pandemic and the severe drought affecting agricultural outputs led to a decrease in the exported volume, which peaked at 440 tonnes in 2020. Exporters export both powder and slices and also offer organic *Curcuma longa* (certified by Ecocert). Most exported products are packed in 25kg bags.

Growing supply coming from Costa Rica

Production of *Curcuma longa* in Costa Rica is relatively new, but has rapidly reached international markets, both in fresh and dried form. Especially the organic certified *Curcuma longa* from this country is very well received in the European market.

Curcuma longa production in Costa Rica is not on a large scale compared to countries like India. Although Costa Rica is not a significant producer of *Curcuma longa*, its exports reached 270 tonnes in 2022. The Netherlands and Germany hold more than 85% of these exports, with (145 tonnes) and (91 tonnes), respectively.

Vietnam mainly exports to the Netherlands

Curcuma longa is cultivated in Vietnam for local use in several industries, ranging from traditional use in food preparations to cosmetics and supplements production. Part of the produced *Curcuma longa* goes to export markets, mainly other Asian countries. India was by far the main destination, followed by China and Japan. Between 2018 and 2022, Vietnam's exports of *Curcuma longa* to European countries doubled from 129 tonnes to 259 tonnes. The Netherlands had a share of 88% of these exports in 2022.

Thailand's *Curcuma longa* surging in global exports

Thailand is a relatively small exporter of *Curcuma longa*, selling 53% of its total exports to India in 2022. Other key markets for Thai *Curcuma longa* were the Netherlands with a 24% share and the United States with a 19% share. The first three markets made up 95% of Thailand's total exports of *Curcuma longa* in 2022.

Thai exports of *Curcuma longa* to European countries are mainly fresh produce and witnessed an increase of 157% in 2022, from 82 tonnes to 210 tonnes.

Cooperation is key for small raw material suppliers

There is a strong and growing demand for *Curcuma longa* in Europe. But competition is fierce, especially from suppliers from India. Therefore, scale of production and processing is important to enter the market.

If you are a small farmer of raw materials, you need to engage with *Curcuma longa* processors at a relatively close distance to be able to ensure product quality. Vertically integrated companies can combine cultivation, processing, and marketing. For example, the Indian company [Sabinisa](#) is involved in research, manufacturing and standardising extracts, as well as marketing and export. Integrated companies also operate on a larger scale and work without growers and/or have plantations to grow the product.

Tips:

Conduct a thorough feasibility study before engaging in *Curcuma longa* cultivation and in particular in further processing. Look into your returns on investment and your financial and human resource capacities to produce according to international buyer requirements.

If you can only cultivate on a small scale, engage with local processors to sell your rhizomes or cooperate with other growers to share the costs of investment in processing equipment.

Engage in organic cultivation as the growing organic market can offer new suppliers more opportunities.

Which companies are you competing with?

Most of the competitors in the European market are from India, as that country dominates the market. Still, there is room for other origins, especially in niche markets like organic.

Companies from India

There are many companies in India that export turmeric. *Curcuma longa* is in the top-5 of spices produced in India, so virtually all Indian spice exporters also export *Curcuma longa*. A few exporters are owned by foreign companies, such as [Sabinsa](#) (headquartered in the United States). Still, most companies are small or medium-sized local companies, such as [Herbocyte](#), and [Ambe Ns Agro Products Pvt.](#)

Competition among the many companies is considerable, which gives buyers a clear advantage when it comes to price negotiation.

Companies from Peru

Peruvian exporters of *Curcuma longa* mostly export a range of agricultural products. In the first place, often they export both *Curcuma longa* and ginger, the two leading spices produced in Peru. Other products that might be part of the range include cacao and dried berries. Some examples of such Peruvian exporters are [Agro-Expo-Llacta SAC](#) and [SupraCorp SAC](#).

The largest exporter from Peru is probably [La Campina](#), which is a farmer's cooperative of organic-certified farmers. La Campina is a young company, with a strong promotion which can be also seen on its attractive website.

Companies from Madagascar

Exporters from Madagascar typically export a wide range of natural produce, such as essential oils, oleoresins and spices, including turmeric. In addition to the famous vanilla beans from Madagascar, they also export cinnamon, ginger, clove, and pepper. One example is [Phael Flor Export](#).

[Jacarandas](#) is another well-known and large exporter from Madagascar. This company is an exporter of turmeric and is also based in France. Germany and France are the two leading essential oils markets in Europe and focus markets for Jacarandas.

Figure 6: Jacarandas Corporate Video

Source: Jacarandas YouTube Channel

Companies from Costa Rica

Costa Rica is profiting for the growing market of organic turmeric. The German company [Biotropic](#) invested in Costa Rica and is growing and exporting its own organic fresh turmeric for the European market. This company specialises in distributing organic produce to supermarkets around Europe.

[Cinco Ramas Farm](#) is another exporter of organic curcuma longa, offering fresh and dried turmeric. Besides turmeric, they have other organic certified spices, which allows them to offer their clients an assortment of different products.

Companies from Vietnam

Vietnamese companies typically export a range of natural produce, ranging from spices, including turmeric, to dried fruits and nuts. These companies often export to European companies that buy the product from different farmers in Vietnam. One such company is [Viet Delta](#), whose offerings range from curcuma powder to fresh produce and canned foods.

Another company is [Visimex](#), selling several organic certified spices including turmeric, cinnamon and black pepper, plus other foods like cashews and coffee.

Companies from Thailand

There are several Thai companies offering bulk turmeric, like [KIJBANLUE MULTI-FOOD CO., LTD](#), which sells different spices including ground turmeric as well as other food preparations, and is FSSC 22000 certified.

Some Thai companies selling turmeric supply ethnic channels in Europe, like specialised Thai shops. The traditional Thai company [NGUAN SOON or 'Hand Brand'](#) company, for example, sells typical Thai spice mixes, including turmeric. Thai companies are also exporting fresh turmeric to Europe. One company is [Fresh Point Company Limited](#), an exporter of several Thai fruits and vegetables, including Curcuma longa.

Tips:

Emphasise your high curcumin content (over 3%) in your product documentation. This can be a competitive advantage for you.

Ensure proper harvest, post-harvest and processing and proper documentation. Carry out improvements on quality according to your buyer's requirements (specifications) and explore what they are willing to pay for.

Have a look at the website of [FoodNavigator](#) to learn more about food health trends and other developments in the food sector.

Ensure traceability of your product and be open about the quality and quantity you can deliver, and at what price.

Which products are you competing with?

The key substitute product for dried *Curcuma longa* is fresh *Curcuma longa*. However, for many consumers, fresh *Curcuma longa* is relatively hard to obtain, as it is not available through most mainstream channels.

Curcuma longa can be used as a colourant. There is no substitute for *Curcuma longa* as a colourant used on an industrial scale, as it is natural and very efficient in use. There are some alternatives for the end consumer. Saffron threads have a similar colour and flavour but are quite expensive. Other alternatives, such as paprika and curry powder (which owes its yellow colour to the curcuma it contains), have a different colour and a strong flavour that affects the taste of a dish.

On the other hand, when curcuma longa is used as a superfood as part of shakes, shots and beverages, the list of substitute products is longer. It includes ingredients like ginger, matcha tea, barley grass, lupins, maca powder, wheat grass, reishi, chaga and moringa. However, these products have completely different nutritional values and flavour profiles.

Tips:

Build a marketing story for your curcuma longa products. Show how they are different from competing products. You can focus on the content of curcumin in your roots or in the sustainability aspects of your company. For example, the Indian company [Agadyati Herbs and Food Private Limited](#), highlights its social engagement in the production of curcuma on [the product page of the Dutch marketplace 1-2-Taste](#).

See also our [tips for doing business with European buyers](#) for natural ingredients for health products.

4. What are the prices for *Curcuma longa*?

Prices for curcuma longa strongly depend on the type of product being sold (dried roots/powder or extract), its curcumin content and whether it has been grown using conventional methods or is organically certified.

Curcuma powder comes with different curcumin contents:

- Turmeric powder with about 2% curcumin content is used for spice mixes, cooking pastes and other preparations with other ingredients.
- Turmeric powder with a curcumin content of 3% is sold as a standalone or 'single spice' and has a higher price.
- Turmeric powder with around 5% curcumin content is used as natural colourant in the industry and has an even higher price. For this type of use, the curcumin content is crucial as it is the main indicator for the colour intensity.

Table 1: Price range for non-sterilised curcuma longa powder from India per kg, CIF Rotterdam or other main European port), June 2023

Type	Conventional	Organic
+ - 2% curcumin content	€1.45-2.00	€2.75-3.25
+ - 3% curcumin content	€1.60-1.90	€3.0-3.4
+ -5% curcumin content	€2.30-2.50	€4.5-5.0

Source: [Globally Cool](#)

Since India has a very high share of the world production, international prices for Curcuma longa strongly depend on the price fluctuations in the Indian market.

The price of curcuma longa that consumers buy in the supermarket consists of:

- Raw materials: 5-15%.
- Processing: 5-15%
- Transport costs: 2-5%
- Import and processing in Europe: 15-30%
- Retail margin: 30-60%

Examples of Curcuma longa prices available across Europe are:

The United Kingdom

- [Turmeric powder from the Indian brand Rajah](#), in a 400gr plastic bag, for £2 (£5.10 per kg), available at Tesco.
- [Turmeric Powder from the British brand East End](#), in a 100gr plastic bag, for £1.2 (£12 per kg), available at Tesco.
- [Turmeric powder in a 75gr spice pot from the British manufacturer Schwartz](#), for £2 (£54.02 per kg), available at Tesco
- [Ground turmeric, in 45 gm spice glass pot from Morrisons](#), for £1.09.

Germany

- [Organic curcuma powder](#), in a 45gr jar for €2.99, from the private label of the supermarket chain REWE (€66.40 per kg).
- [Turmeric powder ground from the brand TRS](#), 100 gr plastic bag, for €1.34. Available through the retailer Kaufland.

The Netherlands

- [Curcuma powder in a 47gr jar from the Dutch brand Verstegen](#), for €2.99, available at the supermarket chain Albert Heijn (€63.62 per kg).

- [Dried curcuma chunks in a jar with mill, from the Italian brand Drogheria](#), containing 48gr for €2.48 (€51.87 per kg) and available at Albert Heijn.

France

- [Organic curcuma powder from Carrefour's private label](#), in a 38gr jar, for €1.65
- [Curcuma powder from the French brand Ducros](#) in a 37gr jar, for €2.55, available at the retail chain Carrefour (€56.67 per kg).

Poland

- [Curcuma powder in a 20gr printed paper bag from the Polish brand Kamis](#), for 1,79 zł, available at the Polish retailer Stokrotka (80.50 zł per kg).
- [Curcuma powder in a 37gr jar](#) from the Polish brand Kamis, for 5,65 zł, available at the Polish retailer DRIVE Intermarché (152.70 zł per kg).

Tips:

Monitor harvests in major production countries, particularly India. This will help you to anticipate price developments for your *Curcuma longa*. You can request such information from European importers or check the [Spices Board of India](#) website.

Stay up to date on worldwide harvests and stock levels. Look for crop reports, which are often shared by industry players during specific spice events. [Nedspice](#) also publishes up-to-date information on national and international prices for *Curcuma longa*.

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

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