

The European market potential for turmeric

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The European market is promising for turmeric suppliers from developing countries. Turmeric has many health benefits that meet the needs of European consumers. Demand for (organic) health products and supplements is expected to continue to rise in the coming years, boosted by the COVID-19 crisis. New innovations create opportunities in Western European countries for turmeric suppliers from developing countries.

Contents of this page

1. [Product description](#)
2. [What makes Europe an interesting market for turmeric?](#)
3. [Which European countries offer the most opportunities for turmeric?](#)
4. [Which trends offer opportunities on the European market?](#)

1. Product description

Turmeric (*Curcuma longa*) is the most common subspecies of the *Curcuma* genus from the family of *Zingiberaceae*. There are about 100 species that belong to the *Curcuma* genus. Other *Curcuma* species include *C. amada* (mango ginger), *C. kwangsiensis*, and *C. aromatica* (wild turmeric). In Europe, only the species *C. zedoaria* (zedoary), *C. xanthorrhiza* and *C. longa* are authorised for use in food supplements.

The largest turmeric producers are India, China, Indonesia, Bangladesh, Myanmar and Vietnam. India is the world's largest producer and exporter.

The roots of turmeric (*Curcuma longa*) contain different active components. The most researched component is [curcumin](#), which has multiple therapeutic properties, including anti-inflammatory and antioxidant properties.

Turmeric has been used in traditional medicine for various conditions in India, Bangladesh and Pakistan. Turmeric is used in Ayurvedic and Unani medicine to treat conditions such as inflammation, ulcers, diabetes, diarrhoea, liver disease as well as various skin conditions including insect bites, chickenpox and itching.

In European health products, turmeric is mainly used for immune support, digestive health and joint health. Other applications include liver support, cognition, mental well-being and heart health.

This report examines the application of turmeric in the health products industry. Turmeric can be used in food supplements and herbal medicinal products (see Table 1 below). Several European countries have established positive lists of species that are allowed in food supplements which include turmeric. In herbal medicine, turmeric is authorised to relieve mild digestive problems. The use of turmeric in medicine is described in Pharmacopoeia monographs. These are descriptions identifying medicines.

In addition to the health products industry, turmeric is sold as a fresh and dried root for food use. In the food industry, turmeric is used as a [spice and food additive, for colour and flavour](#).

Table 1: Use and classification of turmeric in health products

Food supplements	Turmeric root is allowed in food supplements. It is included in the positive lists for Germany and BELFRIT (Belgium, France and Italy). Turmeric essential oil is also listed in BELFRIT.
Herbal medicinal products	Turmeric is allowed on the European market as it is listed in European Pharmacopoeia monograph #2543: <i>Curcuma longae</i> rhizome. Its use in herbal medicinal products is described in the Community Herbal Monograph on <i>Curcuma longa</i> rhizoma.
Chemical Administration Service number	84775-52-0 (turmeric) 458-37-7 (curcumin)
European Community Number	283-881-2
Harmonised System code for trade in turmeric:	0910.30: 'Turmeric (curcuma)', as raw material (root/powder). Turmeric extract is traded under: 1302.19: 'other vegetable saps and extracts'

Figure 1: Example of turmeric products in the European health product market



Source: Naturelo, Fit 'n' Vit and Life Extension (2022)

Tips:

- Determine the concentration of curcumin in your turmeric, because this concentration is linked to turmeric's health benefits. European buyers seek turmeric with higher levels of curcumin content. Work together with a local university to test your product.
- See the [European Union herbal monograph on turmeric](#) for more information on its properties and applications.
- Look for credible literature sources on the benefits of turmeric. Use these references in your product documentation and marketing materials. You can find various scientific studies on platforms such as [sciencedirect.com](#), [NCBI](#) or Google Scholar.

2. What makes Europe an interesting market for turmeric?

Turmeric is gaining popularity on the European market. It is used in the pharmaceutical, food supplement and homeopathic industries. However, in Europe, the majority of turmeric is used by the food industry. Turmeric is increasingly used in the natural health product industry, because it provides several benefits (highlighted in the previous section).

There is a growing demand for nutritional supplements and vitamins in Europe. This trend is driven by rising consumer awareness. Consumers are looking for new ways to improve their health and immune system. The ageing population and the rise in chronic diseases within Europe are raising interest in preventive health care.

The European market for vitamins and supplements is expected to [grow by 5.5% per year between 2022 and 2027](#). The market is driven by growing health-consciousness among consumers. The market is expected to reach a value of [US\\$ 33.8 billion \(€ 31.4 billion\) in 2027](#). The key markets for dietary supplements in Europe are Italy, France, Spain and Germany.

The global complementary and alternative medicine (CAM) market was worth US\$69.2 billion (€ 64.3 billion) in 2019, and is expected to grow at an average annual rate of 19.9% by 2027. [The popularity of complementary and alternative medicine](#) is also rising in Europe, which is the second-largest market globally. Turmeric is commonly used to treat health problems in Europe. The more affluent patients are likely to use CAM procedures as a complementary treatment to conventional medicine.

Around [80% of the world's turmeric](#) is grown in India. Figure 2 shows the leading exporting countries of turmeric in 2021. India is expected to keep its leading position in the foreseeable future. However, the supply of turmeric is vulnerable due to volatile weather conditions in India. Flooding and droughts decrease crop yields.

Figures 3 and 4 show that from 2017 to 2021, European imports of turmeric increased in both volume and value. Turmeric imports into Europe increased by an annual average rate of 8.0% by volume and by an annual average rate of 3.7% by value over this period. The share of imports of turmeric from outside of Europe reached 73.6% in 2021.

The growing number of health-conscious customers in Europe are driving growth; see the section on trends below. Another factor is the increasing popularity of ethnic cuisine in which turmeric is used.

Tips:

- See CBI market statistics and outlook to get more information about the [demand for natural ingredients for health products on the European market](#).
- Visit physical and virtual trade fairs when looking for buyers, as they attract prospective buyers. Examples include [Vitafoods](#), [Health Ingredients Europe](#) and [BioFach](#).
- See the CBI [tips for finding buyers in the natural ingredients for health products sector](#), as it provides practical guidance on finding European buyers on the European market.

3. Which European countries offer the most opportunities for turmeric?

The most attractive European countries for turmeric are the UK, the Netherlands, Germany, France, Spain and Poland. These countries are the leading importers of turmeric to Europe. The imports to these countries have been steadily increasing. This trend is expected to continue. Trade data in this section cover turmeric for food and health uses. It is expected that general developments in turmeric trade also apply to the natural ingredients for health products sector.

Table 2 gives an overview of the leading turmeric importers in Europe in 2021. The table also includes data on the average annual changes in imports, the main suppliers and important market players for turmeric.

Table 2: The leading importers of turmeric in Europe, 2017-2021

2021	'000 Tonnes	average annual change (2017-2021)	million EUR	average annual change (2017-2021)	Main suppliers (% of 2021 volume)	Important Market Players
UK	7.1	8.3%	11.5	2.4%	India (91.0%)	Pukka Herbs , Vitaliving , NatcoFoods
Netherlands	6.8	12.5%	12.1	10.1%	India (45,3%), Peru (29.4%)	Tradin Organic , Forward Farma

Germany	6.4	7.7%	14.0	5.9%	India (78.1%)	Wacker Chemie, Vitabay, Bio Import Europa, Dr. Behr GmbH, Govinda Natur
France	2.5	3.7%	6.1	-0.2%	India (63.4%)	Nexira, Curcumaxx
Spain	2.5	-3.1%	4.4	-3.6%	India (70.2%)	Santiveri, Productos La Constancia S.L.
Poland	1.1	2.7%	2.2	2.7%	India (86%)	GROTEX, AGREMA POLAND SP. Z O.O.

Source: ITC Trade Map (2022)

UK: largest turmeric market in Europe

The UK is the leading importer of turmeric in Europe. Between 2017 and 2021, UK imports of turmeric increased in volume and value. The volume of turmeric imported into the UK reached over 7,100 tonnes in 2021. The volume of turmeric imports increased by an average annual rate of 8.3% from 2017 to 2021. Over the same period, the value of turmeric imports increased by 2.4% annually. In 2021, more than 94% of UK imports of turmeric came from outside of the EU, with India being the leading exporter.

In 2020, the [UK food supplements market reached £494 million](#) (around € 578.8 million), according to Mintel. Around [71% of UK consumers take supplements](#). The UK has a very prospective market for turmeric for health products, as it has one of the largest European consumer markets. Some of the leading suppliers of turmeric supplements are [Pukka Herbs](#) and [Vytaliving](#). There are also a few supplement contract manufacturers in the UK; the [Supplement Factory](#) is one such company. The leading importer of turmeric is [Natco Foods](#).

The UK is expected to remain an important market for turmeric in the coming years. Brexit (UK's exit from the European Union) has disrupted international supply chains. It takes some time to renegotiate trade deals with developing countries. The [UK is working on a bilateral free trade agreement with India at the moment](#).

The Netherlands: important turmeric trade hub in Europe

The Netherlands is the second-largest European importer of turmeric. Between 2017 and 2021, Dutch imports of turmeric increased in volume and value. Dutch imports of turmeric increased by an average annual rate of 12.5% between 2017 and 2021. Over the same period, the value of turmeric imports increased by an average of 10.1% annually. In 2021, 80% of Dutch imports of turmeric came from outside the EU. India and Peru were the 2 largest exporters of turmeric to the Netherlands.

The Netherlands is an important entry point for ingredients to Europe, thus offering an opportunity to exporters of turmeric in developing countries. [Tradin Organic](#) is a leading importer of organic turmeric. Supplement manufacturers that use turmeric include [Forward Farma](#).

Dutch buyers tend to re-export ingredients to other European countries. It is expected that the demand for turmeric from the Netherlands will continue to rise, as the popularity of turmeric supplements is increasing in Europe.

Germany: vastly growing imports of turmeric

The volume and value of German imports of turmeric increased between 2017 and 2021. Over this period, the volume of German turmeric imports increased by an average annual rate of 7.7%. During the same time period, the value increased by an average of 5.9% annually. In 2021, 92% of German imports of turmeric came from outside the EU.

According to Coherent Market Insights, [sales of dietary supplements in German pharmacies](#) in 2020 amounted to €4.4 billion. The market is expected to grow by 3.8% per year between 2021 and 2028. Germany has the largest consumer market in Europe. German consumers have high levels of health-consciousness. Important suppliers of turmeric supplements are [Govinda](#), [Vitabay](#) and [Wacker Chemie](#). German importers and traders sourcing turmeric include [Dr. Behr GmbH](#) and [Bio Import Europa](#).

Germany is expected to remain an important market for turmeric. [Sales of supplements in Germany increased in 2021](#), boosted by COVID-19. Demand for health products and supplements is expected to continue rising in the coming years. At the same time, demand for organic products is also growing in Germany

France: strong and growing food supplements market

French turmeric imports increased in volume between 2017 and 2021. Over this period, the volume of imports increased by an average annual rate of 3.7%. Over the same period, the value of turmeric imports decreased by an average rate of -0.2% annually. In 2021, nearly 77% of French turmeric imports came from extra-EU trade. India was the largest exporter of turmeric to France in 2021.

The [French food supplement market](#) reached €2.1 billion in 2020; plus 1.9% compared with 2019. The French food supplement market is expected to continue growing in the coming years. The global coronavirus is an important driver of growth. France has one of the largest consumer markets in Europe and is also a leading importer of raw materials to Europe. [Nexira](#) is a significant importer of turmeric. A leading French manufacturer of turmeric health products is [Curcumaxx](#).

French demand for turmeric is expected to increase in the coming years. Drivers for this include the demand for high-quality natural products and rising health-consciousness in France.

Spain: growing food supplement market

Between 2017 and 2021, Spanish imports of turmeric decreased in volume and value. Over this period, the volume of Spanish imports decreased by an average annual rate of -3.1%. The value of Spanish imports decreased by an average rate of -3.6% annually. Almost 92% of Spanish turmeric imports in 2021 came from extra-EU trade. With a share of 70.2%, India was the largest exporter of turmeric to Spain in 2021.

In 2020, market researcher DBK valued the [Spanish food supplements market](#) at € 400 million. This market showed [strong growth of around 6%](#) before the COVID-19 pandemic. [Around 75% of the Spanish population](#) consume some type of nutritional supplements. [Santiveri](#) is the main producer of turmeric supplements in Spain. Importers include [Productos La Constancia S.L. Spanish](#).

Poland: prospective market in Eastern Europe with strong growth in

turmeric imports

Polish imports of turmeric increased significantly in terms of both volume and value between 2017 and 2021. Over this period, the volume of Polish turmeric imports increased by an average annual rate of 2.7%. The value of Polish turmeric imports increased by an average rate of 2.7% annually, reaching almost €2.2 million in 2021.

Poland has the largest consumer market in Eastern Europe. In 2020, [Poland's dietary supplement market](#) was valued at around €1.3 billion, a four-fold increase since 2007. In the next few years, the market is expected to increase annually by 5.5%. Important Polish traders are [Grotex](#) and [Agrema Poland](#). Poland has a robust manufacturing sector. Leading contract manufacturers include [Tifarm](#), [BioCorpo](#) and [Tantus](#).

Polish demand for turmeric is expected to increase in the coming years. Rising consumer awareness and demand for natural products are key drivers behind this.

Western European countries are the most prospective for exporters of turmeric in developing countries. Poland is also a prospective market for exporters of turmeric from developing countries, due to its large supplement market, which is expected to grow in the coming years. Western European countries have the largest consumer markets. In addition, Western European countries also have the largest nutritional supplement markets, along with robust processing sectors.

Tips:

- Target Western European countries, as they offer the most opportunities to exporters of turmeric in developing countries.
- Also consider targeting smaller, fast-growing importers of turmeric, such as importers in Eastern Europe. Although they currently import lower quantities, these can still be sufficient if you are a small exporter.
- For more statistics on *Curcuma longa*, check online sources such as [ITC Trademap](#) or the [Indian Spices Board](#). Although the Indian Spices Board focuses on spice production, it also lists useful sources for turmeric exporters, such as turmeric exports from India and turmeric cultivation practices. Be aware that trade data do not distinguish between food or health products.

4. Which trends offer opportunities on the European market?

Increasing demand for organic turmeric and innovation in the turmeric sector makes Europe a prospective market for exporters of turmeric in developing countries. In addition, the global coronavirus has created new opportunities in Europe for exporters. However, climate change and unstable weather conditions, pose a threat to the supply of turmeric to Europe. This is also causing turmeric prices to rise.

Increasing demand for organic turmeric

Demand for organic turmeric is increasing in the European market, and it is expected to continue growing in the coming years. This is supported by one European buyer of turmeric, who stated in an interview that "*organic has become an industry standard*", with its demand "*always increasing*". This trend is driven by increasing consumer awareness and willingness to pay for high-quality products. In addition, European demand for organic foods and plant-based supplements is also increasing.

Peru is the main supplier of organic turmeric to Europe. The Netherlands, Spain, Germany, the UK, France, Italy and Poland import and re-export organic turmeric. In the future, South-east Asian countries with tropical climates could become competing suppliers of organic turmeric depending on quality, price, food safety and seasonal availability.

Industry sources have suggested adulteration as one of the main food safety issues for turmeric from India, which is the leading exporter of turmeric to the European market. Turmeric adulteration is not confined only to India, as it is also an issue in other developing countries exporting turmeric to the European market. Quality and contamination are therefore two major issues for European buyers of turmeric.

To capitalise on the opportunities, you should consider obtaining [EU organic](#) certification as certified organic products are a sign of quality, traceability and sustainability. In addition, having organic certification gives you an advantage in this competitive market as it helps you to stand out.

Figure 6: Logo EU organic certification



Source: ec.europa.eu (2022)

Tips:

Before engaging in any certification scheme, verify with your potential buyers whether a certification is required or demanded on your target market and whether it provides you with a competitive advantage over other suppliers.

Learn more about organic certification on the website of the European Commission. Note that the production, distribution and marketing of organic goods is based on [European legislation](#). See the CBI study [Entering the European market for turmeric](#) for more information about organic certification.

Consult the [International Trade Centre \(ITC\) Standards Map](#) for an overview of different certification schemes.

Prepare and be ready to provide European buyers with a [Certificate of Inspection](#), because its absence means your natural ingredient cannot be traded as organic on the European market.

Display the certification you have acquired on your company website and marketing materials, such as your product catalogue. [Suminter India Organics](#) is an example of a company in a developing country that has capitalised on this trend.

Turmeric production threatened by climate change

Climate change is affecting the production of many agricultural crops, including turmeric. Experts have revealed that some of the biggest pressures on the turmeric industry are around climate change, particularly more extreme weather patterns, flooding, hurricanes and droughts. In India, the planting season of turmeric usually starts in May. However, changing rain patterns sometimes delay planting until August. Droughts also affect the soil quality and the amount of water in the storage systems.

These changes have an adverse effect on the growth of the turmeric plant and its yields. This situation puts pressure on producers and can lead to rising turmeric prices on the international market. Flooding also presents risks to the turmeric supply. In 2021, [India was hit by extreme rainfall](#). Yield loss was reported in some of the major turmeric-producing parts of India.

Ways to prepare for the threats posed by climate change include switching to more sustainable methods of production, as this makes crops more resilient to extreme weather conditions. Collecting farm data, conserving water and soil, intercropping and planting trees are other ways to [prepare for the threats posed by climate change](#).

Tip:

- Contact government ministries for climate and/or agriculture in your country and find out if they help when switching to more sustainable methods of production and preparing for climate change.

Innovation in the turmeric sector

Ingredient companies are always looking for ways to increase the effectiveness of ingredients and products. As a result, the applications of turmeric and turmeric-derived ingredients are increasing, something that is expected to continue in the future.

Turmeric has been gaining popularity among European consumers, while buyers and manufacturers are becoming familiar with its beneficial properties. In 2021, Food Trending named turmeric one of the most sought-after ingredients due to its anti-inflammatory and immune-boosting properties. Ingredient companies are likely to capitalise on its popularity and develop turmeric-derived ingredients with higher levels of effectiveness.

Recently, a number of new products containing turmeric have been launched and more innovation is expected in the future. In mid-2022, [OmniActive Health Technologies will launch its Curcuwin Ultra+ ingredient](#). This product is marketed as being 144 times more bioavailable than the standard curcumin at the same dose. Furthermore, the company states that absorption is 40% faster compared with the standard extract.

According to a scientific study, [curcumin has a positive effect on COVID-19 patients](#). They recover faster from COVID-19 related symptoms. The effectiveness of complementary treatment of COVID-19 patients is being tested. In 2021 [the European Food Safety Authority \(EFSA\) approved the use of a curcumin compound](#), giving European supplement manufacturers a more bioavailable option.

To capitalise on this trend, you should familiarise yourself with the beneficial properties turmeric offers the health products industry. These properties are the main reason behind increasing turmeric innovation. Examples include turmeric's anti-inflammatory, anti-fungal and antioxidant properties.

Tips:

Display the beneficial properties of your turmeric on your company website and in your marketing materials. Doing so makes turmeric more appealing to European buyers.

Make no medicinal claims if you are targeting buyers in the food supplements industry. Food supplements are not allowed to carry medicinal claims.

If you target the pharmaceutical industry, ensure you can meet the high regulatory and buyer requirements regarding herbal medicinal products. See our study on [Entering the European market for turmeric](#) for more information on requirements.

Increasing demand for immune boosting supplements

There has been [growing consumer demand for health products in Europe](#) since spring 2020, especially immunity boosting supplements. This is [expected to be a long-term trend](#). You should therefore capitalise on opportunities offered by this trend.

The global coronavirus pandemic is one of the main factors driving this trend, as consumers seek to boost their immune system. Several natural ingredients for health products contain beneficial health properties that can help to boost the immune system. Turmeric's curcumin content makes it one such natural ingredient, because [curcumin has anti-inflammatory properties](#) that help boost immunity.

Innovations in immune-boosting drinks include plant-based probiotic beverages that have beneficial properties. The global market for plant-based probiotics is expected to hit [US\\$70 billion by 2031](#). Immune-improving wellness shots combine traditional flavours with functional ingredients, like turmeric. A wide variety of drinks contain turmeric to support a healthy digestive and immune system. In addition to the health benefits, turmeric adds flavour and a deep yellow colour. Other ingredients such as black pepper help increase turmeric absorption.

Figure 7: Probiotic wellness shots with turmeric



Source: Good Culture and wildwonder (2022)

Tips:

Always send European buyers turmeric samples that are of the highest quality, as this improves your chances of doing business with them. Following this, always continue to send a high-quality, consistent product, because European buyers expect this.

Ensure your turmeric contains the highest levels of active ingredients, such as curcumin.

Highlight your turmeric's strengths in your marketing materials, as this makes your product more attractive.

Consult the CBI study on [Exporting immune boosting botanicals to Europe](#) for more information about market trends.

This study was carried out on behalf of CBI by [ProFound – Advisers In Development](#).

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