

The European market potential for dried thyme

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The popularity of the Mediterranean cuisine and the perceived health benefits of thyme contribute to the growing demand for dried thyme in the European market. Germany is the largest dried thyme importer in Europe, providing specific opportunities for organic suppliers. Aside from Germany, opportunities for new developing country suppliers can be found in other large and growing markets, such as Spain, Belgium, the United Kingdom, France, and the Netherlands.

Contents of this page

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

1. Product description

Dried thyme is the product obtained by drying the leaves and flowers of fresh thyme. The most widely spread species of the *Thymus* genus used to produce dried thyme is *Thymus vulgaris* or common thyme. Other *Thymus* species are also dried to be used as a culinary or medical herb, including *Thymus zygis* (Spanish thyme), *Thymus serpyllum* (wild thyme) and *Thymus pulegioides* (large thyme). Thyme is also used as a fresh culinary herb or as raw material to produce essential oils, extracts, and oleoresins.

Thyme is indigenous to the Mediterranean region, especially in the Iberian Peninsula and in Northwest Africa. Common thyme is native to Southern Europe, from Spain to Italy. *Thymus zygis* is indigenous to Portugal and Spain. *Thymus serpyllum* and *Thymus pulegioides* also grow in the wild in all European countries. Thyme is now grown in many countries around the world.

Thyme can be dried either naturally or with the use of hot air. Direct sun drying is not recommended as it negatively influences flavour and colour. Dried leaves and flowers can be packed and traded whole, cut or further processed into powder by grinding. The largest quantities are exported as whole dried leaves, which are removed from the stem. Other forms also include coarsely or finely cut leaf, finely cut stem, and different crushed forms. Freeze-dried thyme is a specific type of product made by vacuum evaporation of water from frozen thyme. Freeze-dried thyme is usually traded under the same codes as air-dried thyme, in particular 0910 99 33 (whole) or 0910 99 39 (crushed).

This study covers general information regarding the market for dried thyme in Europe that may be of interest to producers in developing countries. Please refer to table 1 to find the products and their product codes.

Table 1: Products in the dried thyme product group

Combined Nomenclature Number	Product
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0910 99 31	Wild dried thyme (Thymus serpyllum L.)
0910 99 33	Dried thyme (excl. crushed or ground and wild thyme)
0910 99 39	Crushed or ground dried thyme



2. What makes Europe an interesting market for dried thyme?

Europe is the largest dried thyme importer in the world, accounting for a 50% share of the world's total imports. European imports of dried thyme have increased at an annual growth rate of 2% in volume in the period 2015–2019. Around one-third of European dried thyme imports come from developing countries. Also, a large share of the intra-European trade is made of re-exports of dried thyme originally from developing countries.

In the next five years, imports are likely to increase at an annual growth rate of 1%–2%. The expected import and consumption growth are forecasted to be driven by the healthy eating trend and the increasing interest in specific cuisines, such as Mediterranean. Another consumption driver is the growing interest in natural medicines in which thyme is used as a medical herb or in the form of essential oil. Since 2015, imports from developing countries grew at a rate of 3% annually, while intra-European imports grew by 1% per year.

Between 2015 and 2019, European imports of dried thyme grew every year by 4% in value and 2% in volume to reach a value of €32 million and a volume of 8.4 thousand tonnes in 2019. Dried whole thyme leaves represent 63% of the total imported dried thyme volume, crushed or ground thyme 29%, while the remaining 8% accounts for dried wild thyme. Over the last five years, the import share of whole dried thyme leaves is shrinking while ground or crushed dried thyme is gaining market share.

European production of dried thyme is not self-sufficient. The leading EU producers are Poland, followed by Spain, and France, but large volumes are imported from non-European countries. Major supplying areas are North Africa (Morocco and Egypt), Turkey, Middle East (Israel and Syria), and the Balkans (Albania).

3. Which European countries offer most opportunities for dried thyme?

As Europe's main importer of dried thyme, Germany is an interesting focus market. However, Germany is also an important re-exporter of dried thyme. Spain, Belgium, the United Kingdom, France, and the Netherlands are also markets with a relatively large consumption. Demand from those countries is leading to increasing imports from developing countries. Other interesting markets with high import growth rates include Italy, Sweden, Ireland, and Austria.

Germany: leading European dried thyme importer

Germany offers good opportunities. It is the largest European dried thyme market, accounting for approximately a quarter of total European imports. In 2019, German dried thyme imports reached more than 2 thousand tonnes, while consumption was estimated at approximately 1.2 thousand tonnes. Imports grew by 1.2% in volume between 2015 and 2019. Ground thyme is the most imported form of thyme (54%), followed by dried

whole thyme leaves (42%) and wild thyme (4%).

Poland is the leading supplier of dried thyme to Germany, accounting for almost 50% of German total imports, followed by Egypt (16%), Spain (7%), and Turkey (5%). Developing country suppliers gaining market share in Germany include Syria (ground thyme), Egypt (whole thyme leaves), and Albania (wild dried thyme). A significant share of imported dried thyme is used as a medical herb for the preparation of herbal teas and infusions. Thyme is also used as an ingredient in spice mixes for the food industry, including the potato and sausage industries.

Significant volumes of dried thyme in Germany are sold under private labels like Kania ([Lidl](#)), Le Gusto and Bio (by [Aldi Süd](#) and [Aldi Nord](#)), and Rewe Beste Wahl and Rewe Bio ([REWE](#)). Examples of independent brands include [Fuchs](#), [Ostmann](#), [Hartkorn](#), and [BioWagner](#). Germany is a particularly attractive market for organic dried thyme, as the country is the [largest European market for organic food](#). A large share of organic dried thyme is sold through specialised organic food retailers, such as [Denn's](#), [DM](#), and [Alnatura](#).

The [German Spice Association](#) counts almost 90 companies among its members. These companies are primarily engaged in refining spices and producing spice blends, spice preparations, and other seasoning ingredients. In 2018, their turnover exceeded €1.2 billion. Germany's [Fuchs Group](#), which is the largest European spice manufacturer, is also the leading German spice brand and the leading privately owned spice company.



Tip:

Find more about the German dried thyme industry and market on the website of the [German Spice Association](#).

Spain: producer, processor and trader

Spain is producer, importer and re-exporter of dried thyme at the same time. Between 2015 and 2019, Spain's imports increased by 7% in volume, annually. Spanish import volumes reached 970 tonnes in 2019, good for more than €3 million. More than 70% of the imported dried thyme is dried whole, and nearly 30% as wild. Imported dried whole leaves are further processed, packed and consumed within the country or re-exported. Dried thyme is consumed in a variety of soups, stews and fish meals. Significant volumes of imported dried wild thyme in Spain are further processed into essential oils.

Supply of thyme to Spain is very concentrated, where Morocco and Poland have more than 80% market share. The leading supplier of dried whole thyme leaves to Spain is Morocco (54% import share), followed by Poland (29%), Egypt (6%), and Albania (3%). Imports of ground thyme are solely dominated by Poland, with more than 99% share. Egypt's exports to Spain have dropped from 0.7 thousand tonnes in 2015 to 0.4 thousand tonnes in 2019. Bulgaria is an emerging supplier to Spain, with continuously growing exports.

Developing country exporters must be aware of the strong Spanish position in the European thyme supply chain. This means increasing quality demand and a lot of laboratory controls for new suppliers. On the other hand, large Spanish spice companies offer opportunities for entering other European markets through re-export and a well-developed network of contacts.

Spain is also the second-largest European dried thyme producer, after Poland. In 2019, Spanish dried thyme exports reached more than 1.5 thousand tonnes. More than 90% of these consist of dried whole leaves. The leading export destination for Spanish dried thyme is the United States, followed by the Netherlands and the

United Kingdom. The competition section of this study provides more details about Spanish exports.

In the retail segment, dried thyme is mostly sold under private labels of Spanish retail chains, such as [Mercadona](#) (Hacendado), [Carrefour](#), [Alcampo](#) (Auchan), [Lidl](#) (Kania), [Eroski](#) and [Dia](#) (% label). Recently acquired by McCormick, France's [Ducros](#) is the leading independent spice brand in Spain selling dried thymes. Traders of dried thyme in Spain include [Ramón Sabater](#), [Dani](#), [El Clarin](#), [Caylan](#), [Paprimpur](#), [Carmencita](#), and [Juan José Albarracín](#).

Tip:

Find more about the Spanish dried thyme industry and market on the website of [Spanish Association of Processors and Packers of Spices and Seasonings](#)

Belgium: trade hub

Belgium is the third-largest importer of dried thyme in Europe. In 2019, Belgian imports of dried thyme reached 0.9 thousand tonnes, worth €2.2 million. At the same time, Belgium re-exported approximately 350 tonnes, leaving another 500 tonnes for domestic consumption. Dried whole thyme leaves represent more than 80% of all Belgian imports, followed by crushed and ground thyme. Import of wild thyme accounts for only 1%. Belgium serves as a trade hub for dried thyme, with the Netherlands as the most important destination for re-exports.

France is the leading supplier of dried thyme to Belgium, unlike Germany and Spain. In 2019, Belgium imported 70% of its dried whole thyme leaves from France, followed by Israel (19%) and Kenya (3%). Kenya has especially increased exports to Belgium, from only 420 kg in 2015 to 25 tonnes in 2019. Other emerging suppliers to Belgium include Morocco, Palestine, Syria, Jordan, and Lebanon. Those countries still export relatively small volumes to Belgium, but their supplies are constantly growing.

Most dried thyme is sold under private label through retail chains, such as [Colruyt](#) (Boni and Boni Bio), [Delhaize](#), [Carrefour](#), [Aldi](#), [Lidl](#), and [Makro](#). Independents brands include [Ducros](#) and [Santa Maria](#). Examples of Belgian dried thyme traders are [European Spice Services](#), [Innovafood](#), [ISFI](#), and [Evlier](#). As most dried thyme in the retail segment is sold under private labels, developing country exporters can make contacts with private label suppliers, which can be found on specialised events, such as [PLMA](#).

Tip:

Find more about the Belgian dried thyme industry and market on the [Belgian Spice Association](#) website.

The United Kingdom: increasing interest for Mediterranean herbs

Dried thyme imports to the United Kingdom fluctuated significantly in the last few years. This fluctuation is caused by general fluctuations in production while demand is rather stable. In 2016, the United Kingdom was the largest European importer of dried thyme, but import volumes dropped to 0.91 thousand tonnes in 2019. Most imported volumes are consumed within the United Kingdom, with insignificant re-exports. In 2019, the United Kingdom imported 58% of dried whole thyme, 30% of dried ground thyme, and 11% of dried wild thyme.

The leading supplier of dried whole thyme to the United Kingdom is Spain (32%), followed by Egypt (15%), and

Morocco (14%). The leading supplier of crushed and ground thyme is Turkey, followed by Morocco, and Jordan. The leading supplier of dried wild thyme is India, followed by Morocco. Emerging suppliers include Israel, Papua New Guinea, Kenya, and Lebanon. Consumption of thyme in the United Kingdom is stimulated by the popularity of the Mediterranean diet and celebrity chefs, such as [Jamie Oliver](#) and [Gordon Ramsey](#).

Within the retail segment, the private labels of retail chains such as [Tesco](#), [Sainsbury's](#), [ASDA](#), and [Morrisons](#) have the largest market shares. The leading independent brand is [Schwartz](#), owned by McCormick. Other brands include [Greenfields](#) and [Bart](#) (Fuchs group). Examples of important dried thyme traders include [British Pepper and Spice Company](#), [Damasgate Wholesale](#), [Natco Foods](#), [Sleaford Quality Foods](#), and [Camstar Herbs](#).

Britain's exit from the European Union (Brexit) is forecast to increase inflation and labour costs in the United Kingdom. However, dried thyme and other herbs are established as a commodity in the United Kingdom. Therefore, industry experts do not believe that Brexit will influence dried thyme prices much. Consumers in the United Kingdom will continue to consume dried thyme and the volume of direct imports is expected to increase.

Tip:

Find more about the United Kingdom dried thyme industry and market on the [Seasoning and Spice Association](#) website.



France: home of Mediterranean herbs

French dried thyme imports are relatively stable, growing by 4% in value and 1% in volume annually since 2015 to reach 0.76 thousand tonnes, worth €3.2 million in 2019. Most (88%) of the thyme imported to France are whole dried leaves, followed by crushed or ground thyme (9%), and wild thyme (3%).

In 2019, the leading supplier of whole dried thyme leaves to France was Poland with 61% share in volume, followed by Morocco (9%), and Egypt (7%). Poland also leads in imports of ground and crushed thyme (31%), followed by Turkey (21%), and the Netherlands (14%). France imports small volumes of wild dried thyme, mostly from Israel, followed by Tunisia, Albania, and Spain.

France also produces small quantities of dried thyme, especially in the southeast of the country, in the Provence region. In 2019, France registered a protected designation of origin (PDO) for *Thym de Provence*. Provençal thyme is produced from wild varieties and from Carvalia and Thymia varieties. It is normally dried in whole branches, used fresh or in the production of essential oils. Provençal thyme has strong, warm and pungent aroma and taste.

In French cuisine, thyme is used in grilled meat, fish, vegetables, and in soups and stews. Dried thyme is an ingredient in the popular French dried herb mixture *herbes de Provence*. In the retail segment, dried thyme is often sold under retail chains' private labels, such as [Carrefour](#) (Carrefour Herbes and Carrefour bio labels), [Leclerc](#) (Rustica label), and [Auchan](#) (Auchan and Auchan Bio label). The leading independent brand is [Ducros](#) (McCormick), which packs thyme as an individual herb or in mixes, such as *herbes de Provence*. Other independent brands include [Epicea](#), [Sainte Lucie](#), [Jardin Bio](#), and [Albert Ménès](#).

Other dried thyme traders and industry users in France are [Colin Ingredients](#), [Le Jardin des Epices](#), [Spigol](#), [Fuchs](#), [Beaun'Epices](#), and [Soco Herb](#). France is a significant supplier of essential oils, with several companies from this sector also being active in dried thyme sourcing, such as [Golgemma](#), [L'Occitane Group](#), [Biotope](#), and [Arcadie](#). As thyme is a popular ingredient in French cuisine, developing country exporters can use this

opportunity to offer high-quality thyme to the French market. Although Provençal thyme is immensely popular, production is not sufficient to meet domestic demand.

Tip:

Find more about the French dried thyme industry and market on the website of the National [Union of Processors of Pepper, Spices, Herbs and Vanilla](#)

The Netherlands: dried thyme trader

The Netherlands is an important importer of dried thyme. Between 2015 and 2019, Dutch imports increased annually by 7% in volume and by 9% in value. In 2019, Dutch dried thyme imports reached 0.6 thousand tonnes, worth €2.4 million. Whole dried thyme leaves account for 78% of Dutch imports, followed by ground or crushed thyme (21%), and wild thyme (1%). The Netherlands plays an important role as a trade hub in Europe, as more than 60% of all dried thyme it imports is then re-exported to other European countries.

Most dried whole thyme leaves are imported from Kenya (27%), followed by Turkey (19%), Germany (12%) and Spain (9%). Kenya is particularly gaining market share in Dutch imports. Kenya doubled exports of dried whole thyme to the Netherlands from less than 60 tonnes in 2015 to 130 tonnes in 2019. Other emerging suppliers whose exports to the Netherlands are growing include Jordan, Egypt, Lebanon, and Israel.

Within the Netherlands dried thyme is sold in significant shares by private labels of Dutch retail chains, such as [Albert Heijn](#) (AH), [Aldi](#) (De Kruidencompany), and [Jumbo](#). [Euroma](#) is the leading independent brand selling dried thyme in the Netherlands, followed by [Verstegen](#). As most dried thyme in the retail segment is sold under private label, developing country exporters can contact private label suppliers, which can be found on specialised events, such as [PLMA](#). Specialised private label suppliers are very often the leading independent brands at the same time.

The [Dutch Spice Association](#) strongly supports sustainable sourcing of spices. New suppliers to the Netherlands that strongly support thyme farmers and collectors as the first and most important step in the supply chain can get a competitive advantage.

Dutch spice companies offer opportunities for entering other European markets through re-export activities and a well-developed network of contacts.

Tips:

Consider investing in French or Spanish speaking staff to facilitate trade with French and Spanish buyers of dried thyme, who prefer to communicate in their own languages.

See our study on [market statistics and outlook for spices and herbs](#) for more information about general developments in the European spices sector.

Check trade statistics of your interest using the ITC [Trade Map](#) and the European Commission's [Trade Helpdesk](#).

4. Which trends offer opportunities on the European dried thyme market?

The increasing interest in international ethnic cuisines, combined with buyers' needs for stable and sustainable sourcing are the leading driving forces behind the growing interest in dried thyme in Europe. To find out more about general trends, read our study about [trends in the European spices and herbs market](#).

Healthier eating trend and popularity of Mediterranean food

Herbs grown in the Mediterranean climate, including dried thyme, are part of the Mediterranean diet. Several [studies](#) suggest that a Mediterranean diet could lead to lowering the risk of cardiovascular diseases, overall cancer incidence, neurodegenerative diseases, diabetes, and early death. A [World Health Organisation report](#) also shows that several European countries have already included the Mediterranean diet as a part of their national dietary guidelines.

In addition to the promoted health benefits, the rising popularity of dishes using dried thyme as an ingredient also drives consumption. This includes modern [southern European](#) cuisines, such as Italian, Spanish, and French, but also the emerging popularity of [Middle Eastern and North African cuisines](#) and the increasing popularity of Za'atar spice blends. Mediterranean food, including the use of thyme, is promoted by many celebrity chefs and TV cooking and travel shows across Europe.

Thyme's health benefits

Dried thyme is used not only as a culinary ingredient, but also as a medical herb for the preparation of herbal infusions, tinctures, and essential oils. The [European Spices Association](#) released several publications regarding the health benefits of spices. Dried wild thyme is one of the most popular European herbs used in traditional herbal medicine. It is used to treat common infections, coughs, bronchitis, and asthma.

A number of clinical research demonstrate thyme's health benefits, including:

- Antitussive and antispasmodic – Preventing and relieving cough;
- Antimicrobial – in vitro tests have demonstrated activity against Escherichia, listeria and salmonella from thyme extracts;
- Antioxidant – Several substances in thyme have potent antioxidant activity comparable to that of alpha-tocopherol;
- Astringent – Due to bitterness of tannins, stimulating appetite;
- Anthelmintic – Helping to expel parasites from the body.

Ready meals consumption

Due to their busy urban lifestyles, a growing number of European consumers buys ready-to-eat or easy-to-prepare meals from supermarkets. These meals can usually be reheated or eaten fresh. Europe is the largest consumption market of ready meals in the world, with around one-third of this market. Many of these meals use dried thyme as an ingredient in French, Italian or Mediterranean dishes and products, such as roasted potatoes, pasta sauces, ready-to-use stuffing mixes, flavoured pre-cooked rice, stock pots, flavoured oils, stuffed peppers or olives.

In the same line, different dried and dehydrated spice and ingredient mixes are increasingly used for quick home cooking. These mixes usually require adding main ingredients, such as fresh vegetables or meat, and cooking in water, frying or oven baking, such as Gyros Fix (Maggi), Lemon & Thyme Tray Bake (Schwartz), and Rice Sides (Knorr).

The long shelf life of ready meals made sales grow strongly in the initial weeks of the COVID-19 pandemic in 2020, but this is expected to remain a temporary increase in demand. However, consumption of ready meals is forecast to continue to grow in the next several years at somewhat lower rates.

Sustainable sourcing

Sustainability has been an important topic over the past several years in this sector. Important sustainability issues in dried thyme production relate to pesticide residues and inadequate drying methods. Depending on the country, the production of spices itself also involves labour issues, such as gender inequality, poor conditions for migrant workers, and child labour.

The [sustainability trend](#) moved from niche markets into the mainstream recently. Market leaders are investing in sustainability not only to improve their marketing, but also to reduce costs, shorten supply chains and facilitate compliance with European regulations.

A group of mainly European companies and organisations formed the [Sustainable Spice Initiative](#) in 2012, seeking to improve sustainability in spice production and sourcing, and potentially fully sustainable spice production and trade. Several developing country thyme suppliers are members of this initiative, making additional efforts to support sustainable production, such as switching to organic production, investing in food safety and supporting farmers. Notable examples thyme exporter members include [Agrin Maroc](#) (Morocco) and [Birlik](#) (Turkey) .

Sustainable sourcing is not only a private initiative. Sustainability has been placed on the global agenda through the UN's [Sustainable Development Goals](#), covering not only environmental, but also social and ethical issues. Most spices are produced by small-scale farmers who typically grow spices alongside other crops, depending on the geographical area, often facing poverty and food insecurity.

Tips:

Promote your product as a healthy ingredient and stress the benefits of your dried thyme in people's diets. A common type of spice promotion in Europe is to attach a recipe on the retail packaging of spices and herbs.

Follow the principles of the [Sustainable Agricultural Network](#) (SAN) on matters such as environmental integrity, social well-being, and economic resilience.

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

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