

Entering the European market for dried thyme

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Food safety certification combined with reliable and frequent laboratory tests creates a positive image for dried thyme exporters to Europe. Sustainable production and implementation of corporate social responsibility standards will provide additional advantages for emerging suppliers. The strongest competitor to new dried thyme suppliers is Poland. The strongest non-European dried thyme supplier is Morocco, followed by Egypt, Turkey, and Israel. Other emerging suppliers include Kenya, Albania, Syria, Palestine, Jordan, and Lebanon.

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1. What requirements should dried thyme comply with to be allowed on the European market?

In addition to the quality requirements mentioned in the section below, please refer to our study about [buyer requirements for spices and herbs](#) for a general overview of buyer requirements in Europe.

What are mandatory requirements?

All foods sold in the European Union must be safe, including dried thyme and imported products. Additives must be approved. Harmful contaminants, such as pesticide residues, and excessive levels of mycotoxins or preservatives are banned. It should also be readily obvious from the labelling whether a food contains allergens.

Official border control for dried thyme imported to the European Union

Official food controls include regular inspections that can be carried out at importation or at all further market stages. In case of non-compliance with the [European food legislation](#), individual cases are reported through the [Rapid Alert System for Food and Feeds](#) (RASFF), which is freely accessible to the general public.

Repeated non-compliance with European food legislation by suppliers from a particular country may lead to special import conditions or even suspension of imports from that country. These stricter conditions include laboratory test results for a certain percentage of shipments from specified countries. Dried thyme is not currently subject to increased border control for any supplying country.

Contaminants control in dried thyme

An [European Commission Regulation](#) sets maximum levels for certain contaminants in food products. Frequently updated, this regulation sets the limits for general foodstuffs, including a number of contaminant limits for specific products, including dried thyme. The most common requirements regarding contaminants in dried thyme are related to the presence of pesticide residues. Other contaminants found in thyme are microbiological

organisms, foreign bodies (such as insects), heavy metals, and undeclared food additives.

Pesticides Residues

The European Union has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticide residues than allowed will be withdrawn from the European market. However, excessive residues of pesticides are not very frequent in dried thyme trade. The European Union regularly publishes and updates [a list of approved pesticides](#) that are authorised for use in the European Union. One current issue has been an announced lowered limit of [chlorpyrifos](#) residues.

When assessing the MRL, pesticide residues found in dried thyme have to be put in relation to fresh thyme. Article 20 of the [European MRL regulation](#) permits, in the case of dried products (like dried herbs), concentration caused by the drying process to be taken into account, when determining the MRL. The recommended dehydration factor for dried thyme has been set by the European Spices Association at 7.

Microbiological contaminants

Microbiological contaminants, such as bacteria or viruses, can be transferred from animals or people to dried thyme. Bacteria are usually transmitted to dried thyme by irrigation with unsafe water, use of untreated manure as fertiliser, and harvesting with dirty hands. In some areas, the drying process is also performed in an open space, which increases the risk of infestation with bacteria by animals and birds.

European [microbiological criteria for foodstuffs](#) regulation specifies control, sampling and maximum levels of microbiological contaminants in food. In line with this regulation, exporters of dried thyme will be asked by European importers to make laboratory analyses tests for the presence of microorganisms, such as salmonella, listeria, E. Coli and staphylococcus. The maximum determined limits for most common microorganisms are:

- Salmonella spp.: absence in 25 g
- E. Coli: < 10 cfu/g
- Enterobacteriaceae: <1000 cfu/g
- Moulds: <1000 cfu/g

One of the most important parameters for exporters is to ensure control over microbiological contamination. It is therefore strongly recommended to heat treat (sterilise) dried thyme to minimise the risk. Please note that recall costs in Europe can be extremely high, and on episode may ruin your reputation as a supplier. If investing into sterilisation equipment is prohibitive for your company, you can use sterilisation services, which are performed in several producing countries, but also in Europe, such as by [Food Ingredients Service Center Europe](#).

Irradiation

Irradiation of dried thyme is not often used but is authorised by the European Union as a way of sterilisation. Irradiation must take place in approved facilities. Irradiated foods must be labelled. As such, European consumers dislike irradiated food. Buyers in Europe are commonly asking for radioactivity contamination tests for imported dried thyme. [Food irradiation legislation](#), maximum permitted levels of [radioactive contamination](#) and the European Union [radiation protection legislation](#) are base regulations for laboratory tests for the detection of the increased level of radioactivity in dried thyme.

Mycotoxins

Mycotoxins' (aflatoxins and ochratoxin A) presence in dried spices and herbs is frequent. However, mycotoxin occurrence is not so frequent in the case of dried thyme compared to many other spices. Some research indicate that that thyme oil has [antimicrobial potential](#), preventing the development of mycotoxins. Still, producers need to take utmost care about post-harvest and storage practices. Dried thyme easily absorbs water from the environment, which makes it sensitive to the development of moulds and mycotoxins.

Food additives

Buyers and European authorities can reject products if they have undeclared, unauthorised or too high levels of extraneous materials. Specific legislation for [additives](#) (like colours, thickeners) and [flavourings](#) list what E-numbers and substances are allowed. Authorised additives are listed in Annex II to the [Food Additives Regulation](#). Food additives are not normally used in dried whole thyme production. However, anti-caking agents may be used in the production of powdered thyme. Keep in mind that European traders and consumers prefer dried thyme that is additive-free.

Tips:

To control the use of contaminants in dried thyme, only use the services of laboratories which are [ISO/IEC 17025](#) accredited. The presence of aflatoxins must be tested according to the EU regulation on [methods of sampling and analysis for the official control of the levels of mycotoxins](#) in foodstuffs.

Read more about maximum residue levels on [the website of the European Commission](#). Prepare for potential changes in the MRLs by reading the [ongoing MRL reviews](#).

Follow the Codex Alimentarius' [Code of Practice for the Prevention and Reduction of Mycotoxins in Spices](#) and [Code of Hygienic Practice for Low-Moisture Foods](#). Steam sterilisation has proven effective in reducing mould presence. European buyers favour steam sterilisation, which is natural, and chemical- and radiation-free. Store your dried thyme in dry conditions to prevent excessive moisture accumulation.

What additional requirements do buyers often have?

Quality requirements

The minimum requirements for dried thyme are: it must be intact (if traded as a whole) and it must be free from diseases, foreign matters, foreign odours, and other disorders. The maximum moisture content for dried thyme is set at 12%. The European Union does not have official standards for the quality of dried thyme. The most widely used industry standard is Codex Alimentarius' [Standard for Dried Thyme](#).

The quality of dried thyme is determined by several factors, including subjective ones, such as taste and flavour. The most common parameters for quality specification of dried thyme include:

- Style – Dried thyme may be sold whole (most commonly as whole leaves, but also as the whole bunch), cut (leaves and stems), crushed (from a course to fine crush) or ground (processed into powders).
- Odour and flavour – Dried thyme shall have a characteristic odour and flavour according to the chemical components of the volatile oil (such as thymol, carvacrol, and linalool). Flavour profiles vary depending on geographic and climatic conditions.
- Chemical composition – Determined by the percentage of total ash (max 12%), acid-insoluble ash (max 3.5%), and volatile or essential oils (minimum of 1 ml/100 g). The quality of dried thyme is higher when percentage of ash is low, and content of essential oils is high. The typical essential oil content in cultivated thyme is approximately 1.5%; in wild thyme it is 3%–4%. Content of thymol in thyme essential oil is one of the important factors in thyme quality, but it is more relevant for essential oils than for spice users.

Food safety certification

Although food safety certification is not obligatory under European legislation, it has become a must for almost all European food importers. Most established European importers will not work with you if you cannot provide some type of food safety certification.

Most European buyers will ask for [Global Food Safety Initiative](#) (GFSI) recognised certification. For dried thyme, the most popular certification programmes are:

- [International Featured Standards](#) (IFS)
- [British Retail Consortium Global Standards](#) (BRCGS)
- [Food Safety System Certification](#) (FSSC 22000)

Please note that this list is not exhaustive and food certification systems are constantly developing. Most food safety certification programmes are based on existing ISO standards, like [ISO 22000](#).

Although different food safety certification systems are based on similar principles, some buyers may prefer one specific management system. For example, British buyers often require BRC, while IFS is more common for German retailers. Also note that food safety certification is only a basic requirement to start exporting to Europe. Reliable buyers will usually visit your production facilities, checking, for example, your traceability and hazard control points.

Corporate social responsibility

Different Companies have different requirements in terms of corporate social responsibility. Some companies require adherence to their own code of conduct, while other companies require adherence to one or more common standards. Examples include the Supplier Ethical Data Exchange ([SEDEX](#)), Ethical Trading Initiative ([ETI](#)), and Business Social Compliance Initiative code of conduct ([BSCI](#)). If dried thyme is meant for the retail segment, suppliers will have to follow a specific code of conduct developed by retailers, such as [Lidl](#), [Rewe](#), [Carrefour](#), [Tesco](#), and [Ahold Delhaize](#).

Packaging requirements

Dried thyme is commonly exported in bulk and packaged in three-layer paper bags, sometimes with a polyethylene inner sheath. The size of the bulk packaging varies according to the buyer's requirements, usually between 8 kg and 25 kg but most commonly between 10 kg and 15 kg. The selected packaging size should be such that the dimensions conform to the conventional pallet sizes (800 mm x 1,200 mm and 1,000 mm x 1,200 mm).

Dried thyme must be stored dried and cool, protected from sun, heat, moisture, insects, and other animals.

Net weight of retail packaging is usually between 10 g and 20 g. Retail packaging includes glass containers, plastic bags, plastic containers, and paper bags. Glass containers are particularly popular as they enable to see and visually inspect dried thyme before buying. The content in the package must correspond with the indicated quantity (in weight or volume) on the label. Importers will check size and weight to ensure that pre-packed products are within the [limits of tolerable errors](#).

Labelling requirements

Each export package shall declare:

- name of product, for example, 'dried thyme';
- net weight in metric system;
- shelf life of the product;
- lot identification number;
- country of origin and name and address of the manufacturer, packer, distributor or importer.

Lot identification and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark. An export package label can also include details, such as dried thyme variety, brand, harvesting year, and drying method.

In case of retail packaging, product labelling must comply with the [European Union 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. Retail packs must be labelled in a language easily understood by consumers in the European target country, so generally in the country's official language. This explains why European products often carry multiple languages on the label.

In addition to this regulation, from 1 April 2020, all food in retail packs in Europe must be labelled with the [indication of origin](#). If dried thyme is packed in Germany, packaging needs to display the origin. This can be done by indicating a country (like Morocco), by indicating 'non-EU' or by declaring 'dried thyme does not originate from Germany'.

A 2019 decision of the [European Court of Justice](#) specifically related to sourcing products from Israel, mandates European Union countries to identify products made in Israeli settlements on their labels. The court's decision clarifies that indicating that goods originate in the state of Israel, as opposed to occupied territory, could mislead consumers about the fact that Israel 'is present in the territories concerned as an occupying power and not as a sovereign entity'.

Tips:

For product specification of dried thyme, use standardised laboratory tests, like [ISO standardised tests](#).

Read more about transport and storage requirements for dried thyme on [the website of Transport Information Services](#).

Follow the European Spice Association's [Quality Minima Document](#) on the chemical and physical parameters that your dried thyme need to comply with.

Do a self-assessment through the producer starter kit from the [BSCI website](#).

Read more about payment and delivery terms in the [CBI's tips for organising your spices and herbs export](#) to Europe.

What are the requirements for niche markets?

Organic dried thyme

To market dried thyme as organic in Europe, it must be grown using organic production methods according to the [European legislation](#). Growing and processing facilities must be audited by an accredited certifier before you may put the European Union's organic logo on your products, as well as the logo of the standard holder, for example, [Soil Association](#) in the United Kingdom, and [Naturland](#) in Germany.

Note that importing organic products to Europe is only possible with an [electronic certificate](#) of inspection (e-COI). Each batch of organic products imported into the EU has to be accompanied by an electronic certificate of inspection as defined in Annex V of the Regulation [defining imports of organic products from third countries](#). This electronic certificate of inspection has to be generated via the [Trade Control and Expert System](#) (TRACES).

Sustainability certification

For an overview of the developments of sustainability initiatives in the European spices market, read our study on [trends in the European spices and herbs market](#).

Sustainability is a broad term covering many aspects of production, distribution and trade, and there is still no worldwide recognised certification for all of it. One increasingly used aspect is to publish CO2 emission rates for

specific products, but it is difficult to obtain reliable measurements for those claims. An example of a recently established certification based on CO2 emissions is [Myclimate](#).

Currently, the most famous certification schemes are [Fairtrade](#), which focuses on ethical practices, and [Rainforest Alliance](#), which focuses on environmental impacts. Fairtrade International developed a specific [standard for herbs, herbal teas and spices](#) for small-scale producing organisations. This standard defines issues related to traceability, management and production practices and labour conditions. According to this standard, a premium price of 15% over and above the negotiated price between producer and seller must be established.

There are currently 20 Fairtrade certified thyme producers in Egypt, three in Uzbekistan, two in India, one in Kenya and one in Palestine.

A group of mainly European companies and organisations formed the [Sustainable Spice Initiative](#) in 2012 to strive for fully sustainable spice production and trade in the sector.

Ethnic certification

Islamic dietary laws (Halal) and Jewish dietary laws (Kosher) propose specific dietary restrictions. If you want to focus on these niche markets, consider implementing Halal or Kosher certification schemes.

Tips:

Consult the [Sustainability Map database](#) for sustainability labels and standards.

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

2. Through what channels can you get dried thyme on the European market?

Dried thyme is sold through different channels to reach the end segments of retail (home consumption), food service (out-of-home consumption), or ingredient segment (such as spice manufacturers or the food industry). Whole thyme leaves are mostly sold to the retail and food service segments, while ground thyme is used by the food industry, for example, in the production of meat and fish products, sauces, soups, and ready meals.

How is the end market segmented?

End market segments for dried thyme include the food processing industry, retail, food service, and ingredients.

Figure 1: End-market segments for dried thyme in Europe



Source: Autentika Global

Retail segment

The retail and food-service segments are divided between independent brands and private labels. Some leading brands in Europe include [Fuchs](#) (Germany), [Ostmann](#) (Germany), [Ducros](#) (Portugal, Spain, France, and Belgium), [Schwartz](#) (United Kingdom), [Euroma](#) (Netherlands), [Verstegen](#) (Netherlands), [Cannamela](#) (Italy), [Santa Maria](#)

(Scandinavia), and [Prymat Group](#) (Poland). [McCormick](#) is the global and European market leader, present in Europe with several brands, including [Drogheria](#), [Kamis](#), [Margao](#), Ducros, and Schwartz.

Private label supermarket brands are also important. Production for these brands is done by European spice packers and blenders. Since supermarkets often require frequent and regular shipments and have very specific requirements regarding packaging, it is very difficult to supply to them directly. Dried thyme already packed in origin countries can be found in European ethnic shops, such as Turkish, North African or Middle Eastern food stores.

The retail sector can be further segmented into supermarkets, independent grocers and specialty shops, such as health, organic or spice shops. Most retailers sell individually packed dried thyme or specific mixtures with thyme as an ingredient. Overall, spice and herb mixtures are becoming more popular in the retail segment, partly due to the increasing interest in ethnic foods. Several increasingly popular combinations of spice mixtures contain dried thyme, such as Middle Eastern Za'atar, Jamaican jerk seasoning, French *herbes de Provence* and American Louisiana Cajun seasoning.

Companies holding the largest market shares in Europe include Schwartz Gruppe (Lidl and Kaufland), Carrefour, Tesco, Aldi, Edeka, Leclerc, Metro Group, Rewe Group, Auchan, Intermarché and Ahold (Delhaize, Albert Heijn and several other brands).

Retail traders and specialised shops often also have online presence. The Covid-19 pandemic and the restrictions imposed in many countries in Europe have dramatically increased online orders in March and April 2020. Online sales are expected to continue to be popular after 2020, compared to previous years.

Food processing segment

The food processing segment is the biggest user of dried thyme 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. Those companies are constantly investing in research to develop custom formulations for food processing companies and help them launch new attractive flavours. They produce either dried or liquid spice ingredients. Some examples of spice mixtures and ingredients companies are [OSI Food Solutions](#), [AVO](#) (European group), [Meat Cracks](#), [Colin Ingredients](#), [Kerry Ingredients](#), [Frutarom](#), [Farevelli Group](#), [Food Ingredients Group](#), [Kalsec](#), [EHL Ingredients](#), and [Ion Mos](#).

The European sauces, condiments and dehydrated soup industry is also an important user of dried thyme. This market is dominated by international brands, such as Kraft Heinz, McCormick, Maggi (Nestlé) and Knorr (Unilever).

Food service segment

The food service channel (hotels, restaurants, catering, and institutions) is usually supplied by specialised distributors. These distributors import dried thyme directly, but they are also often supplied by wholesale bulk importers. The food service segment often requires specific packaging of dried thyme, which is different from bulk or retail packaging (for example, from 150 g to 200 g packs).

World cuisines, healthy food and food enjoyment are the major driving forces in the food service 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.

Other non-food industries

Non-food industries such as producers of health and cosmetic products also import and use dried thyme as an ingredient. Dried wild thyme (*Thymus serpyllum*) is also packed as a medical herb for the preparation of herbal infusions. Producers of essential oils and oleoresins use dried thyme as an ingredient. Those products are further sold to the cosmetics industry to produce shampoos, fragrances, creams, and soaps. Dried thyme is also used as an ingredient in food supplements and other health products.

Although non-food use of dried thyme is not the focus of this study, the pharmaceutical industry, as well as producers of essential oils, oleoresins and extracts also largely use dried thyme.

Tips:

To find potential buyers for your dried thyme within the food ingredient segment, search the list of exhibitors of the specialised trade fair [Fi Europe](#).

To explore your possibilities of supplying dried thyme to European private labels, consider participating in [PLMA](#), the world's leading private label trade fair.

To supply to the food service segment, visit [Sirha](#), the European leading hospitality and food service event.

To learn more about non-food market segments for dried thyme, read our studies on [Natural Ingredients for Cosmetics](#) and [Natural Ingredients for Health Products](#).

Through what channels does a product end up on the end-market?

The most important channel for dried thyme in Europe are specialised spice importers. Dried thyme can also be placed on the market through agents, or directly supplied to food processors or food service companies. Some wholesalers also have packing facilities and usually supply private label dried thyme brands.

Importers and Wholesalers

Importers and wholesalers can be general spice importers or further specialised in specific roles. Some exclusively deal with ingredients aimed at the processing industry while others pack dried thyme for retail chains. Some importers deal with a broader range of products, in addition to spices, such as beans and seeds.

The higher requirements from retailers determine the supply chain's dynamics from the top down, putting pressure on importers and food manufacturers. This pressure forces prices down, but also brings to the market more products that have added value qualities, such as sustainable, natural, organic, and fair trade.

Remaining attractive for large retailers requires transparent, short, and effective supply chains. 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 dried thyme in Europe include [Albarracin](#) (Spain), [Nedspice](#) (Netherlands), [European Spice Services](#) (Netherlands), [Husarich](#) (Germany), and [Saran Enterprises](#) (Poland).

Examples of specialised importers using dried thyme in different spice mixtures include [Culinar](#) (Sweden), [Epos](#) (Netherlands), and [Colin Ingredients](#).

[ISFI Spices](#) (Belgium) is an example of a spice importer that supplies to several different segments.

Figure 2: Trade channels for dried thyme in Europe



Source: Autentika Global

Agent and broker

Brokers and agents are intermediaries that bring buyers and sellers together. They charge a commission for their services. Agents and brokers are interesting if you have a special product, such as high-quality or sustainable thyme, for which buyers are harder to find. The role of the agent is slowly diminishing due to the increased transparency demanded by the market. Another role agents play is to participate in tenders launched by European retailers. In this case, agents can help exporters to place dried thyme in the European retail segment.

Other channels

For an overview of different food processing segments and retail using dried thyme, read our chapter above.

What is the most interesting channel for you?

Specialised importers are the best channel to sell dried thyme 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. Still, private label packing is often done through importers that have contracts with European retail chains. As labour costs in Europe are growing, importers of dried thyme sometimes search for opportunities to pack brands in developing countries, if they can ensure full traceability and quality control.

Tips:

Find buyers from different channels and segments at the European Spice Association's [members list](#).

To find agents and brokers specialised in spices and herbs trade in Germany, look at the trade contacts of the German association Waren-Verein, which allows membership from non-EU companies.

3. What competition do you face on the European dried thyme market?

Poland is the main competitor for emerging dried thyme suppliers in Europe. Outside Europe, the most important competitors are Morocco, Spain, Egypt, Turkey, and Israel. Leading European suppliers also include Germany and France, but they are mostly transit countries for imported dried thyme. Although France produces dried thyme, French production is not enough to meet domestic demand, so France imports most volumes from Poland and other countries. Other emerging competitors include Kenya, Syria, Albania, and Lebanon.

Which countries are you competing with?

Poland by far the leading supplier of dried thyme to Europe

Poland is the second-largest exporter and producer of dried thyme in the world (after Turkey), but the leading European supplier. Poland produces approximately 3 thousand tonnes of dried thyme, of which nearly 90% is exported. The largest producing region for dried thyme in Poland is Lublin province in the southeast with an estimated production of 2 thousand tonnes. The most famous thyme cultivar in Poland is Słoneczko, but several others are also cultivated, including French Summer, Varico 3, Standard Winter, and others.

Poland's dried thyme exports have been consistently growing at an average annual growth rate of 4% over the last 5 years. In 2019, Polish exports of dried thyme reached 2.7 thousand tonnes, worth €8.5 million, with Turkey as the leading export destination. Around 80% of Polish dried thyme is exported to the European Union, with Germany, Spain, France, and Hungary as the main target markets in Europe. The most exported form is dried whole thyme (80%), followed by crushed or ground thyme (17%), and wild thyme (3%).

Morocco, Europe's leading developing country supplier

Morocco is specifically strong in dried rosemary and dried thyme. Thyme in Morocco is not grown in significant volumes, but mostly collected in the wild. A specific species of thyme native to Morocco and North Africa, is savoury thyme (*Thymus satureioides*). This thyme has a slightly more bitter taste profile and it is mostly used to produce essential oils. The largest thyme collecting area is in the Atlas mountain (south of Morocco). The thyme collection area in Morocco is estimated at nearly 300 thousand ha. Collection starts in February and finishes by the end of June.

Production of dried thyme in Morocco is estimated at 3 to 3.5 thousand tonnes. Approximately one-third is consumed locally or processed into essential oils within the country. Dried thyme exports from Morocco stagnated over the last five years, mostly because Moroccan thyme is collected in the wild, where production volume cannot be easily influenced. In 2019, Moroccan exports of dried thyme reached 2 thousand tonnes, worth €6 million. Almost all dried thyme is exported in the form of dried whole leaves, with only 3% exported in crushed or powdered form.

The leading export destinations are Nigeria, followed by the United States, Turkey, and Canada. Around one-third of Moroccan exported dried thyme goes to Europe, with 700 tonnes in 2019. Of these exports to Europe in 2019, Morocco sent 63% of dried whole thyme leaves to Spain, followed by the United Kingdom (13%), France (10%), and Italy (7%).

Export prices of dried thyme from Morocco are similar to prices from Poland. Still, Morocco can be considered price competitive, because Moroccan savoury thyme has richer chemical compounds in essential oils, compared to Polish common thyme. For this reason, Moroccan thyme is largely used for the extraction of essential oils and sold to the pharmaceutical industry. It can be expected, in the long term, that Moroccan dried thyme suppliers will invest more into thyme cultivation to ensure more stable supply.

Spain, the second largest European supplier

For developing country suppliers, it is important to understand that many Spanish dried thyme processors should be seen not only as competitors, but as potential partners that import dried thyme from other countries, mostly from Poland and Morocco. Spanish thyme production is largely aimed at the production of essential oils and to a smaller extent at the food industry and retail supply. The region of Murcia (southeast) is the centre of cultivation and processing of aromatic and medical plants in Spain, with more than 3.5 thousand ha.

Spain is famous for the collection of several wild thyme species, especially *Thymus zygis*, which is collected mostly in the regions of Almeria, Murcia, Alicante, and Jaen. The four main types of Spanish thyme are Violet, Red, Grey and common thyme (*Thymus vulgaris*). All of them are used as culinary herbs, but Red thyme is also specifically used for the distillation of essential oils. Drying wild thyme in Spain is usually done by collectors (farmers) and further processing steps (such as cleaning, sterilisation and packing) by spice companies.

Dried thyme exports from Spain increased at an average annual growth rate of 4% over the last five years, passing 1.5 thousand tonnes in 2019. The most exported forms are dried whole thyme leaves (89%), followed by crushed or ground thyme (7%), and wild thyme (5%). Approximately 70% is exported to other European countries and the remaining 30% to the rest of the world, but primarily to the United States. In 2019, Spain exported 34% of its dried thyme to the US, followed by the Netherlands (25%), the United Kingdom (16%), and Germany (6%).

Egypt, growing supplier to Europe

Egypt is one of the world's leading producers of dried culinary herbs, including significant volumes of dried basil, marjoram, parsley, dill, and mint. In addition to these, dried thyme production and exports are increasing too. The largest production areas are Asyt and Beni Suef, along the river Nile and Faiyum Oasis. Moreover, Fayoum and Beni Suef have several essential oil distillation factories. Precise data on produced and exported thyme from Egypt is not known due to limitations in Egypt's statistical classification.

Egypt exports around 1 thousand tonnes of dried thyme, with Europe as the main destination (60%–70%), followed by the United States and Saudi Arabia. Since 2015, Egyptian exports of dried thyme to Europe grew at an annual growth rate of 9%, reaching 600 tonnes in 2019, worth €1.3 million. In 2019, dried whole thyme leaves accounted for 66% of Egyptian supply to Europe, followed by crushed or ground thyme (31%), and wild thyme (3%). Germany is the main European market for Egyptian dried thyme with a 55% export share, followed by the United Kingdom, France, and Spain.

Egypt is one of the leading herb exporters to Europe, so it can be considered as a strong competitor to suppliers from other countries. One of the sustainability issues Egyptian producers face is having to use polluted water from the river Nile, as many do not have access to treated water.

Turkey: dried thyme processor

According to statistical data, Turkey is estimated to be the largest exporter of dried thyme in the world, with exports exceeding 17 thousand tonnes. However, statistical data from Turkish customs is not harmonised with European Union statistics, meaning that this data is not accurate. The main issue is that under the name 'thyme', Turkish customs classifies other herbs, especially oregano, under the same code. Nonetheless, Turkey is a significant exporter of dried thyme with increasing exports to Europe and the United States.

In 2019, Turkey exported nearly 500 tonnes of dried thyme to Europe, worth €2 million. A similar volume went to the United States, and some to Morocco. Thanks to the country's developed herb processing industry, a large share of exported dried thyme from Turkey consists of value-added (crushed or ground) products. A lot of value adding is performed in Izmir free zone, where many cleaning, packing, grinding, and sterilisation facilities are located. In 2019, Turkey sent to Europe 60% of its crushed or ground thyme exports, 39% of its whole thyme leaves, and 1% of its wild thyme.

The leading European market for Turkish crushed thyme was the United Kingdom with a 47% share, followed by Germany (17%). The leading European market for whole thyme leaves from Turkey was the Netherlands, with a 48% export share, followed by Germany (16%). Due to value addition by grinding and crushing, Turkish export prices are significantly higher, compared to whole thyme. The average import price (CIF) of Turkish crushed dried thyme in Europe exceeded €4/kg while the price of whole dried thyme leaves was below €3/kg.

Israel, dried thyme and fresh herbs

Israel is an established supplier of fresh herbs to Europe. Israeli agronomists and technologists developed modern production and logistic chains to supply European markets with fresh herbs. Some Israeli companies also invested in Kenya to expand production and lower costs. In order to diversify supply, some herbs, including thyme are also processed and dried by Israeli companies. Israel's dried thyme assortment is relatively concentrated by only a few thyme processing companies.

Most Israeli dried thyme is exported to the European Union and the United States. However, European imports of dried thyme from Israel have been reducing. In 2015, European imports from Israel were at nearly 400 tonnes but it have gradually dropped to 250 tonnes in 2019. More than 96% of Israeli exports to Europe consists of dried whole leaves, followed by 4% of crushed or ground thyme. The main market for Israeli dried thyme is Belgium with 60% export share, followed by the United Kingdom (18%), and the Netherlands (9%).

Tips:

Use the services of your national export promotion agency and actively participate in the creation of export strategies.

Regularly visit leading European trade fairs, such as [ANUGA](#), [SIAL](#), [Biofach](#), and [Food Ingredients Europe](#) to meet your competitors.

Learn about good export promotional practices from the [Aegean Exporters Association](#).

Read more about the development of medical and aromatic herbs projects in Poland from the [Institute of Natural Fibres and Medicinal Plants](#).

Which companies are you competing with?

Polish companies

The leading processor and exporter of dried thyme in Poland is [FZL](#), which produces and exports many types of fresh, dried, and frozen herbs, although they specialise in dried thyme since the early 1990s. To ensure full traceability, the company is investing in vertical integration, and providing support to farmers in the form of agricultural advice, fertilisers and other plant protection products. In addition to sourcing from local farmers, the company also has its own thyme production.

In order to comply with all European market requirements, FZL thoroughly performs quality checks of raw material and frequent laboratory controls. The company has its own laboratory for quality and contamination checks. Because of their strong quality and contaminants controls, FZL company is able to offer dried thyme leaves far below European MRLs.

Examples of other Polish dried thyme exporters include [Thympol](#), [Polish Herbs](#), [Herbimar](#), [Runo](#), and [Kujawskie zioła](#). Examples of Polish companies selling dried thyme as a medical herb are [Herbapol](#), [Flos](#), [Kawon](#), and [Dary Natury](#).

Moroccan companies

Companies in Morocco either buy already dried thyme from collectors, or fresh, then dry it in their own facilities to better control the production process. Production of cultivated common thyme also started in Morocco more recently, supported by government funds. Examples of companies growing medicinal and aromatic herbs include [Agriarom](#) and [Beleco](#).

An example of a successful Moroccan exporter of dried thyme is [Agrin Maroc](#). They specialised in processing, packing and exporting dried medicinal and culinary herbs. In order to ensure high quality and contamination control, the company invested in a modern automatic sterilisation line. Agrin Maroc has a strong organic assortment, being certified to export organic products to the EU and the US. They have also obtained several food safety certifications that allow them to enter different market segments.

Other examples of dried thyme exporters from Morocco include [Santis](#), [Aphysem](#), and [Plante Doukala](#).

Spanish companies

[Ramón Sabater](#) is a notable Spanish exporter of spices and herbs, including dried thyme. As a member of the Sustainable Spices Initiative, Ramón Sabater committed to ethical and socially responsible practices and efficient use of natural resources. In addition to sourcing dried herbs and spices from local and international suppliers, the company organises organic farming in the region of Murcia. The company is equipped with several steam sterilisation, cutting and grinding lines. Sabater has several food safety, social compliance and ethnic certifications.

There are many other traders and processors of dried thyme in Spain. Many exporters are members of specialised associations, such as the [Spanish Association of Processors and Packers of Spices and Seasonings](#) (AEC), the [Provincial Association of Entrepreneurs of Spices Condiments and Infusions of Alicante](#) (APRECOIN), and the [National Interprofessional Association of Aromatic and Medicinal Plants](#) (ANIPAM).

Egyptian companies

Egypt is characterised by a large number of dried spices and herbs traders. Many of them do not process thyme, but only perform export and trade activities.

[Giza Seeds and Herbs](#) is one of the leading Egyptian dried herbs exporters, especially known for its dried basil. To ensure food safety, the company implements steam sterilisation and ethylene oxide (ETO) sterilisation, according to customers' requests. The company also has its own chemical and microbiology laboratory. Giza Seeds and Herbs has been named by Unilever as a sustainable supplier. Dried thyme is one of their traded lines, but not the leading one.

[Spice Kingdom](#) is another recognised supplier from Egypt. Other examples of Egyptian exporters which are more specialised in dried thyme include [Pharaon Herbs](#), [Nabil Morsi](#), [Herbs Egypt](#), [Al Dahlia](#), [AMD Verde](#), and [United](#). Examples of large processors and exporters of many types of herbs and spices are [Elseba](#), [Healthy Foods Egypt](#), and [Spice Home Company](#).

Turkish companies

[The Kütaş Group](#) is Turkey's leading exporter of dried thyme. The group is made of four companies: KÜTAŞ Agro (specialised in growing herbs), KÜTAŞ Tarım (specialised in herbs and spices processing), Safe Spice (specialised in sourcing and sterilisation), Universal Spice (specialised in ETO sterilisation for US clients) and Artisan (specialised in delicate hand packing products, such as thyme on branch bouquets). KÜTAŞ was the first company in Turkey to obtain Rain Forest Alliance certification.

Other examples of Turkish dried thyme processing and exporting companies include [Belmar](#), [Birlik](#), [Altuntas](#), [Steam Lab](#), and [Ürün Tarım](#).

Israeli companies

Israel's largest exporter of dried herbs, including dried thyme, is [SDA Spice Agricultural Cooperative Society](#). SDA uses modern agricultural practices and mechanisation to produce fresh herbs which are further processed in the company's facilities. They also process herbs into value-added, customised dehydrated ingredients.

Tips:

In order to successfully enter the European dried thyme market, you need to study your competitors' different strategies. You may be either price competitive and offer safe and quality products (such as Moroccan companies) or offer unique products (such as dehydrated products for the pharmaceutical industry) or customise your product to specific segments, such as organic.

It is very important to learn from the largest competitors, including placing a strong emphasis on food

safety control.

Contact the [Polish Chamber of Commerce](#) to find out more about dried thyme companies in Poland.

Which products are you competing with?

Dried thyme is unique in sensory characteristics, so there is not a real substitute among other spice categories. The main substitute product for dried thyme is fresh thyme and other substitute herbs, such as oregano.

Fresh thyme

European consumers are becoming more familiar with healthy and ethnic cuisines, which is contributing to the consumption of fresh herbs. Fresh thyme is produced within Europe by several countries, very often in convenient pots to be grown inside homes. Fresh thyme is produced by southern European countries, such as Italy, France and Spain. Some European producers, such as the Netherlands' [Greenfresh](#), also invested in production in Kenya. Israel is also an important sourcing origin.

Dried thyme substitutes

Although the flavour profile of thyme is unique, it can be substituted with other herbs, especially oregano. Oregano has a slightly more bitter flavour than thyme, but has a resembling flavour profile. Dried oregano is traded in larger quantities compared to thyme and is widely available throughout Europe. Most European consumers are used to oregano flavour because of its wide use in pizza preparation and sauces.

Tips:

Learn more about the fresh thyme market in the CBI study on [Exporting Fresh Herbs to Europe](#).

Contact the [European Herb Growers Association](#) to learn more about fresh thyme production in Europe.

Use steam sterilisation to safely produce dried thyme and gain an advantage over fresh thyme.

4. What are the prices for dried thyme?

Precise margins for each actor in the supply chain depend on too many factors. However, dried thyme powder normally fetches the highest prices, followed by quarterly cut leaves, while whole leaves have the lowest prices. An illustrative example (CFR) is:

- Dried whole leaves: €2.5/kg–€2.7/kg
- Dried cut leaves: €2.7/kg–€2.9/kg
- Powder: €2.9/kg–€3.1/kg

Retail prices in European supermarkets vary per brand and type of dried thyme. The price of 1kg of dried thyme (common retail packs are 15 g–20 g) is usually €80/kg–150€/kg. Glass containers are normally more expensive than plastic containers and bags.

The price breakdown below is a very rough indication. Many factors contribute to the price, including quality, variety, origin, food safety certification costs, consultants, social security, taxes, sales, and network margins.

Table 1: Dried thyme retail price breakdown

Steps in the export process	Type of price	Example, margin addition and price breakdown (€/kg)
Raw material price	Collectors price / Farmer price	1
Processing, packing and export of whole dried thyme leaves	FOB price	2.5
Storing, handling and shipping	CIF price	3
Processing and retail packing	Final production price	50
Selling to retail	Wholesale price (including value-added tax)	70
Retail sales of the final packed product	Retail price	100

Source: Autentika Global

Note: the raw material price is based on the assumption that 3 kg of fresh thyme yield 1 kg of dried thyme.

Tip:

Subscribe to the [Mintec](#) or [ISH Markit](#) portals to receive timely updates on dried thyme export prices.

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

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