

Entering the European market for coriander seeds

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When entering the European coriander seeds market, you must comply with the legal and additional buyer requirements that apply in Europe. Competition in the European market comes mainly from countries such as Russia, India, Bulgaria, Ukraine, and Morocco. Make sure to differentiate yourself from these competitors. There are different channels for entering the coriander seeds market, with importers and wholesalers being the most common ones. As a beginning exporter, try to collaborate with specialised spice importers.

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1. What requirements and certifications must coriander seeds meet to be allowed on the European market?

Coriander seeds should comply with the general requirements for spices and herbs. You can find these in CBI's study on [the requirements for spices and herbs](#). You can also use [Acces2Markets](#), which provides an overview of the legal requirements for coriander seeds per country.

What are the mandatory requirements?

Coriander seeds sold in the EU must be safe and are subject to official food controls when imported. The EU has set maximum levels for certain contaminants, such as mycotoxins, microbiological contaminants, and pesticide residues. Make sure to comply with EU regulations. Products exceeding the maximum levels are withdrawn from the European market.

Official food controls

Coriander seeds imported into the EU are subject to official food controls. These controls include regular inspections, either carried out at import (at the border) or at any further stages of trade. Non-compliance with [European food legislation](#) is reported through the [Rapid Alert System for Food and Feeds](#) (RASFF).

Repeated non-compliance with European food legislation for by-products from a particular country may result in special import conditions or even a suspension of imports from that country. For coriander seeds, India is subject to such special conditions due to the risk of contamination from pesticide residues. Coriander seeds from India face an increased 20% frequency of checks for pesticide residues.

Pesticide residues

[Regulation \(EC\) No 396/2005](#) sets maximum residue levels (MRLs) of pesticides in or on plant-origin food and

feed. An MRL is the highest pesticide residue legally permitted in or on food products. Products exceeding these permitted levels are removed from the European market. Over the last year, the [RASFF](#) database has reported several instances where levels of chlorpyrifos in coriander seeds/ground coriander were found to be too high.

Tip:

Consult the [EU Pesticides database](#) for more information on the MRLs for pesticide residues in spices. Coriander seeds are categorised under seed spices 0810000 and have been given the code [0810040](#).

Contaminants control

Coriander seeds may contain contaminants. These substances are not intentionally added to food but may end up in coriander seeds because of the manner of production, packaging, transport, holding, or environmental contamination. As contamination has a negative impact on food quality and can cause a risk to human health, the EU has set [maximum levels for certain contaminants in food](#). For coriander seeds, the EU has set limits for mycotoxins (Ochratoxin A), metals (lead), and processing contaminants (polycyclic aromatic hydrocarbons), but no issues have been reported for these contaminants in RASFF.

Tips:

Read more about [contaminants](#) on the European Commission's website.

Comply with the Codex [Code of Practice for the Prevention and Reduction of Mycotoxins in Spices](#) (CXC 78-2017).

Microbiological contaminants

[Regulation \(EC\) No 2073/2005](#) lays down the microbiological criteria for foodstuffs. The EU regulation does not set specific limits for coriander seeds, meaning the general limits apply. The most important microbiological risk is salmonella, for which one issue was reported in RASFF in recent years. Salmonella must be completely absent from coriander seeds.

Tips:

Give the coriander seeds a heat treatment (sterilisation). Heat sterilisation is a natural method (free from chemicals and radiation) popular among European buyers. The equipment for heat sterilisation is quite expensive, so it may be more cost-effective to use a third party.

Comply with the Codex Alimentarius [Code of Hygienic Practice for Low-Moisture Food](#) (CXC 75-2015).

Control of unauthorised agents

Food additives (like colours and thickeners) are prohibited in the production of dried whole coriander seeds. However, anti-caking agents can be used to produce powdered coriander seeds. [Regulation \(EC\) No 1333/2008](#) sets out rules for the use of food additives and [Regulation \(EC\) No 1334/2008](#) for the use of food flavourings. It is important to note that European buyers prefer coriander seeds without any additives.

Labelling

Label your coriander seeds correctly. In the [RASFF](#) database, a few labelling issues have occurred with coriander seeds: coriander without a label and ground coriander with a non-labelled allergenic ingredient.

Make sure that the labels of bulk packaging have the following information:

- Name (Coriander) and variety of product
- Batch code
- Net weight in the metric system
- Shelf life of the product or 'best before' date and recommended storage conditions
- Lot identification number (or identification mark)
- Country of origin
- Name and address of the manufacturer, packer, distributor, or importer (or identification mark)
- Batch details (may also be included in the [Product Data Sheet](#))

For consumer packaging, product labelling must comply with [Regulation \(EU\) No 1169/2011](#). This regulation more clearly defines nutrition labelling, origin labelling, allergen labelling, and minimum font size for mandatory information.

Figure 1: Consumer label of ground coriander seeds in the French market



Source: [Carrefour](#), July 2024

What additional requirements and certifications do buyers often have?

European buyers may have additional requirements in addition to the legal requirements. These concern quality requirements for coriander seeds, food safety certification, packaging requirements, and social and environmental sustainability.

Quality requirements

Several factors, including size, shape, colour, taste, and flavour, influence the quality of coriander seeds. Even the same cultivars can vary in quality despite being grown in the same country. Factors such as agricultural practices, climatic conditions during the growing season, and post-harvest handling, can all impact quality. Common parameters used to specify the quality of coriander seeds include:

- Cleanliness or purity: Coriander seeds should be intact when traded as a whole. The [European Spice Association \(ESA\) Quality Minima Document](#) states that spices must be free from odour, off-flavour, and foreign matter (objects must not be greater than 2mm). The presence of extraneous matter can be a maximum of 1% by weight. Furthermore, the maximum content of total ash for coriander seeds is set at 7% and the acid-insoluble ash at 1.5%. However, the requirements can vary per buyer and may include more specific indicators.
- Moisture content: [ESA's Quality Minima Document](#) sets the maximum moisture content at 12%. However, buyers may request a different moisture content (mostly between 9% and 14%).
- Mesh or particle size: Coriander seeds exported in powdered form are ground to pass through a sieve of a

specific diameter (often specified in micron sizes). A typical requirement is that 95% to 99.5% of the ground coriander seeds need to pass through the specific size of the sieve, usually 500 microns, but sometimes more.

- **Odour and flavour:** Coriander seeds should have a characteristic odour and flavour. The flavour profile of coriander seeds is primarily influenced by the chemical components of the essential oil, including d-linalool, coriandrol, alpha-pinene, terpinene, geranyl acetate, camphor, and geraniol. This profile can vary based on the variety, cultivar, geographic location, climate, and growing conditions.
- **Volatile oils:** The essential oil content of coriander seeds depends on the variety. The *Microcarpum* variety is known for its high essential oil content. The [ESA Quality Minima Document](#) stipulates a minimum volatile oil content of 0.6 ml/100g. The *Macrocarpum* variety has a relatively low level of volatiles (less than 0.5 ml/100 g) and no minimum has been set for this variety. Rather, the sensorial flavouring properties should be agreed upon between the buyer and seller.

When shipping coriander seeds, you should specify the variety or cultivar in the product specification. If the packaging contains other varieties or cultivars than stated, some buyers perceive it as fraud, while other buyers may accept or tolerate this to a certain degree.

Food safety certification

Food safety is essential in the European market. European buyers will ask for a [Global Food Safety Initiative](#) (GFSI) recognised food safety system certification. For coriander seeds, the most relevant certification standard is [Food Safety System Certification](#) (FSSC 22000). There is a small chance that buyers will ask for other certifications such as [International Featured Standards](#) (IFS) or [British Retail Consortium Global Standards](#) (BRCGS).

Third-party certified programmes benefit your company and are valued by new buyers. However, serious buyers will also visit and/or audit the production facilities of new suppliers.

Packaging requirements

Coriander seeds are mostly exported in bulk. For industrial packaging, coriander seeds are typically packed in 25kg polypropylene or paper bags. However, the packaging size can vary depending on the requirements of the buyer. In some European countries, labour health and safety legislation restricts workers to a maximum lifting weight of 20kg. Consequently, smaller packaging with weights of 10kg or 20kg are increasingly used. The dimensions of the selected packaging size should conform to common pallet sizes (800 mm x 1,200 mm and 1,000 mm x 1,200 mm).

In retail, coriander seeds are available in various packaging types, with glass containers being the most popular. Other options include plastic containers, plastic bags, and paper bags. The net weight of retail packaging mostly lies between 15g and 40g, though larger packages (100 grams and more) are also occasionally found in ethnic retail outlets.

Figure 2: Retail packaging types of coriander seeds in different European markets



Source: [GloballyCool](#), June 2024

Sustainability compliance

Social and environmental sustainability are important topics for European buyers. Large European spice companies have all set goals to buy sustainably-sourced spices and improve transparency throughout their supply chains. As a result, suppliers often have to undersign the buyer's code of conduct.

Since 2022, the [European Spice Association \(ESA\)](#) has developed a [Code of Conduct for responsible sourcing](#). Many European spices and herbs companies are members of the ESA. As such, you will likely come across this guideline.

Tips:

See CBI's study on [organising your spices and herbs exports to Europe](#) for requirements related to payment and delivery terms.

Follow [ESA's Quality Minima Document](#) on the chemical and physical parameters (Appendix I) for your coriander seeds and the recommended analytical methods (Appendix II).

What are the requirements for niche markets?

If you want to supply coriander seeds to a particular niche market, consider additional requirements such as organic, fair trade, and/or ethnic certification.

Organic certification

To market coriander seeds as organic, they must be cultivated using organic production methods that comply with [EU organic regulations](#). Additionally, the growing and processing facilities must undergo audits by an accredited certification body.

Figure 3: Organic certified coriander in the Spanish market



Source: [GloballyCool](#), June 2024

Fairtrade certification

In the global fairtrade market, there are several fairtrade certification organisations. Fairtrade International is the most well-known certification scheme. Fairtrade International developed a specific [standard for herbs, herbal teas and spices](#) for small-scale producer organisations. The standard defines, among other things, [Fairtrade Minimum Prices and Premiums](#) for certified products. For coriander seeds, there is no fixed Fairtrade minimum price or premium. For spices without a fixed price, the Fairtrade premium is set at 15% of the commercial price.

Ethnic certification

Islamic dietary laws (halal) and Jewish dietary laws (kosher) prescribe specific dietary restrictions. Coriander is commonly used in halal and kosher-certified spice blends for curries, stews, and meat in a variety of Mediterranean, Middle Eastern, and North African dishes. The larger spice companies in Europe in particular have already developed a range of halal-certified spices, such as the Dutch company [Verstegen](#).

Tips:

Read CBI's [study on the requirements spices and herbs must comply with to be allowed on the European market](#) to get a complete overview of all the requirements, including organic and fairtrade certification.

Consult the [ITC Standards Map](#) to get an overview of the relevant certification schemes and their requirements.

Consider implementing halal or kosher certification schemes to make your coriander comply with the certification requirements for these large segments.

2. Through which channels can you get coriander seeds on the European market?

Coriander seeds are used in various segments, such as retail, the food service industry, and the food industry. They enter the European market through different channels, most commonly through importers and wholesalers. Importers can be specialised spice importers, ethnic food importers, and spice mixes and ingredient suppliers. Make sure to target the right buyer to effectively enter the European market.

How is the end market segmented?

The end-market segments for coriander seeds include the food processing industry, retail, food service, and ingredients industries (other industries) (Figure 4).

Figure 4: End-market segments for coriander seeds in Europe



Source: [GloballyCool](#), July 2024

Food processing industry

The food processing industry uses the most coriander seeds in the European market. This segment's primary users are spice mixture producers, the meat industry, and the sauces and condiments industry.

Spice mixture and ingredient producers specialise in spices and seasonings for different uses. These companies invest in research to develop new formulations and flavours for the food processing industry. Ground coriander is either used as a stand-alone spice or as an ingredient in spice mixes, such as meat spice blends, Asian or Middle Eastern spice blends, and curries. Examples of spice companies include [Prymat group](#) (Poland), [Fuchs Gruppe](#) (Germany), [Euroma](#) (the Netherlands), and [McCormick](#) (the United States, present with several brands in Europe).

The meat-processing industry uses coriander powder in spice blends for sausages, minced meat, and other meats. This industry is especially large in Germany, with players like [Tönnies](#) and [Meica](#). Most companies do not import spices directly; they rather buy custom spice mixes from specialised ingredient companies such as [Nubassa](#).

The sauces and condiments industry uses ground coriander, among other things, in curries and sauces. Companies active in this industry include [Patak's](#) (the United Kingdom), [The Spice Tailor](#) (the United Kingdom), [Hela](#) (Germany), and [Kühne](#) (Germany).

Other industries that use coriander seeds as an ingredient include the plant-based meat industry and the alcoholic beverages industry. There is an increasing demand for vegan and vegetarian meals, and companies are tapping into this segment by developing meat substitutes. The meat-substitution industry uses the same spices as the meat-processing industry. In the alcoholic beverage industry, coriander seeds are used as a

flavouring agent in different alcoholic drinks, such as gin. This industry sources coriander seeds from traders specialising in botanical ingredients.

Food retail

The retail sector can be segmented into several categories: retail chains, independent grocers, specialised shops, and online retail. Retailers offer individual packets of coriander seeds or sell spice blends and pastes with coriander as an ingredient. Spice and herb mixtures are gaining popularity in the retail market, driven by the growing interest in ethnic cuisine, such as curry mixes, garam masala, and ras el hanout.

Mainstream retail chains with physical outlets can operate either in one market or are present in several European markets. Think of, for example, [Carrefour](#) (France), [Albert Heijn](#) (the Netherlands), and [Tesco](#) (United Kingdom). They sell coriander seeds and spice mixes from leading brands such as [Verstegen](#) (the Netherlands).

At the same time, supermarkets also offer a range of spices under private labels, and coriander is regularly included. These private-label spices are produced by spice packers and blenders that sell to multiple countries, such as [The Spice Factory](#) (Belgium). Large retail chains also have their own online sales channels, including [Albert Heijn](#) (the Netherlands), [Mercadona](#) (Spain), and [Sainsbury's](#) (United Kingdom).

Within the category of specialised shops, there are different types that offer coriander seeds. These can be shops (mostly online) specialised in spices and herbs, such as [De Kruidenkaravaan](#) (the Netherlands) and [The Spice Shop](#) (the United Kingdom). Also, some spice companies set up their own online shops, such as [Pune Gust](#) (Romania) from the Fuchs Gruppe.

Other specialised shops include ethnic retail chains such as [Amazing Oriental](#) (the Netherlands) and organic stores such as [Alnatura](#) (Germany). These stores typically offer different brands than large supermarkets, such as [Duqqa](#) (organic) and [TRS](#) (ethnic).

Food service

The food service sector includes hotels, restaurants, catering, and various institutions. These companies purchase from specialised wholesale food suppliers such as [Metro Cash & Carry](#), [Brakes](#) (part of [Sysco](#)), and [Bidfood](#). In turn, these suppliers get their spices and herbs products (sometimes through purchasing organisations like [Maxxam](#)) from spice importers/wholesalers. There are also wholesale suppliers that specialise in the ethnic food service segment, such as [Girofood](#) from the United Kingdom.

Brands in the food service sector include well-known spice companies, as well as brands specifically targeting the food service sector, such as Apollo (the food service brand of [Solina](#)). The food service segment requires different packaging of coriander seeds than the food industry and retail. Packaging sizes mostly vary from 250g to 1kg and are typically white or transparent user-friendly dispenser cans.

Other industries

Coriander seeds can also serve as raw material for producing essential oils, oleoresins, and extracts. Consequently, they are used in the cosmetics industry, for example in shampoos, creams, and fragrances. Additionally, coriander seeds are used by companies that manufacture health products, including food supplements.

Tip:

Visit the relevant trade fairs for the segment you want to target: [Fi Europe](#) (food ingredient segment), [PLMA](#) (private label), or [Sirha](#) and [Internorga](#) (food service segment).

Through which channels do coriander seeds end up on the end market?

Coriander seeds can enter the European market through various channels, as shown in Figure 5.

Figure 5: Market channels for coriander seeds to Europe



Source: [GloballyCool](#), July 2024

Importers and wholesalers

Importers and wholesalers may either be general spice importers or specialised spice importers. Some focus exclusively on supplying ingredients to the processing industry, others pack spices for retail chains, and some supply to both segments. There are also importers that handle a wider range of products beyond spices, such as grains or pulses:

- Bulk spice importers include wholesale traders and owners of large-volume retail brands such as [Barnes Williams](#) (the United Kingdom), [Nedspice](#) (the Netherlands), [Saran Enterprises](#), and [Chudzinski](#) (Poland).
- Ethnic food importers specialise in supplying the ethnic food retail and service segment. They often import branded products or smaller packs (smaller than typical bulk packs, i.e. 1-5kg). Examples include [Fudco](#) (the United Kingdom), [Kreyenhop & Kluge](#) (Germany), and [AsiaExpressFood](#) (the Netherlands).
- Spice mixes and ingredient suppliers specialise in supplying to a wide range of food industries. Examples include [The Dalesman Group](#) (the United Kingdom), [Organic Flavour Company](#) (the Netherlands), and [Colin Ingredients](#) (France).
- General importers. These importers handle a variety of products, including spices. Examples of companies include [Haudecoeur](#) (France) and [Nidegro](#) (the Netherlands).
- Other importers: suppliers of botanicals for alcoholic beverages (i.e. [Star Spice](#)), suppliers to the food supplements industry (i.e. [Buckton Scott](#)), and flavour and fragrances suppliers (i.e. [IFF](#)).

Importers and food manufacturers face increasing pressure from retailers. High demands from the retail sector influence supply chain dynamics from the top down. This pressure leads to lower prices and a growing emphasis on added-value products such as sustainable, natural, organic, and fair-trade. Transparency within the supply chain is essential, so several importers have developed their own codes of conduct and focused on establishing long-term relationships with their suppliers.

Agents and brokers

Agents and brokers are intermediaries who connect buyers and sellers. They earn a commission for their services. They are particularly useful when dealing with niche products (i.e. organic coriander seeds) for which it is more difficult to find buyers or if you lack capacity in sales. Agents can also assist you in participating in European retailers' tenders. In this case, they will help you place coriander seeds directly in the European retail segment.

For example, [Van der Does Spice Brokers](#) is a full-service spice brokerage house. This agent can help buyers source Rainforest Alliance spices directly from the country of origin.

Tip:

Look for a buyer who best aligns with your company and product. It is important to understand the different segments and discuss the preferences and requirements for coriander seeds with your potential buyer.

What is the most interesting channel for you

Specialist spice and herb importers are the most interesting channels for introducing coriander seeds to the European market. This is particularly true for new suppliers, as supplying multiple segments directly can be very demanding. For well-equipped and price-competitive suppliers, packing for private labels can be an option. This is typically managed by importers who establish partnerships with European retail chains. For example, the Indian company [Jayanti](#) supplies bulk and retail-packed private-label spices to the Polish spice importer [Saran Enterprises](#).

Another interesting channel is ethnic food importers, who can help with direct entry into the ethnic food segments. However, it might be challenging to form partnerships with these importers as they already have established brands from other suppliers in their product range.

Tip:

Search the [member list of the European Spice Association](#) to find buyers from different channels and segments.

3. What competition do you face in the European coriander seeds market?

Competition in the European coriander seeds market comes from different parts of the world. The Russian Federation is the top supplier of coriander seeds to Europe. India is a large producer of spices, including coriander, and is known to have a robust processing infrastructure for spices. You also need to consider competition from Eastern European countries – such as Bulgaria and Ukraine – and Morocco.

Which countries are you competing with?

With a 22% market share, the Russian Federation is the main competitor in the European market for coriander seeds. Most of Russia's production is of the *Coriandrum sativum* Microcarpum variety, which is high in essential oils and, therefore, is also suitable for the essential oil industry. India is the second-largest supplier, with a 16% market share. India grows the *Coriandrum sativum* vulgare variety, mainly used in the food segment.

Other competitors include Bulgaria (15% share of European imports), Poland (7.4%), Ukraine (5.8%), and Morocco (4.4%). Bulgaria is the largest producer of coriander seeds in Europe and, like the Russian Federation, produces the Microcarpum variety. Poland is not a producer of coriander seeds; rather, it is a transit country. It imports the seeds from the Russian Federation and eastern European countries and re-exports them to other European countries.

Source: UN Comtrade, June 2024

The figure below shows the harvest calendar for coriander seeds from several countries that supply them. India's harvesting is early in the year and takes place from March to May, whereas most other countries – such as Morocco and Ukraine – mostly harvest from June onwards. Bulgaria follows later in the season, namely in August-September.

Figure 7: Harvest calendar coriander seeds per main supplying country



Source: [GloballyCool](#), based on [Nedspice](#), July 2024

Russian Federation: leading supplier to Europe

With a market share of 22%, Russia is the largest supplier of coriander seeds to Europe. Between 2019 and 2021, exports increased significantly from 5.6 thousand tonnes to 9.3 thousand tonnes. However, from 2021 to 2023, due to the war with Ukraine, exports to Europe dropped significantly to a total volume of 5.8 thousand tonnes in 2023.

Russia exports most (65%) of its coriander seeds to Poland, which re-exports them to other European countries, such as Germany and the Netherlands. Another share is processed into herbs and spices for European tea and spice producers, wholesalers, and packaging companies. The Polish company [Chudzinski](#) is an example of such a processor.

Coriandrum sativum *Microcarpum* is the main variety cultivated, especially in central and southern European countries. This type is characterised by small seeds (not exceeding 3mm), a strong flavour, and a rich essential oil content. It is cultivated for its high oil yields, which makes this coriander seed also important for growers and producers of essential oils and oleoresins.

The main regions for growing coriander seeds are situated in southern Russia, between the Caspian Sea and the Black Sea, specifically in the areas of Rostov Oblast, Krasnodar Krai, and Stavropol Krai. The coriander seeds are typically harvested from June to August, with the peak season occurring in July.

India: dominating the world market with a small share exported to Europe

India is the largest producer and exporter of coriander seeds in the world. In 2023, it exported around 98 thousand tonnes of whole coriander seeds and 12 thousand tonnes of ground/crushed coriander seeds. Only a small part is exported to Europe: a total of 4.3 thousand tonnes in 2023 (3.9% of India's total export volume). This makes India the second-largest supplier of coriander seeds to Europe (share 16%). Exports to Europe have increased over the last five years, with an average annual growth rate of 3.5%.

80% of the coriander seeds exported to Europe go to the United Kingdom, making India the leading supplier to that country. Other large volumes of India's coriander seeds go to the Netherlands (6.1%) and Italy (4.0%). India has significantly strengthened its market position in both countries. In 2019, India exported almost no coriander seeds to the Netherlands and Italy. However, its market share has since increased to 9.7% in the Netherlands and 32% in Italy, securing the top position in the Italian market.

India cultivates mostly the *Coriandrum sativum* *vulgare* variety. These seeds are larger (over 3mm) than the *Microcarpum* variety. Indian coriander seeds are oval-shaped and have a clear, almost yellow exterior. They are mostly used in the spice trade; due to their lower essential oil content, they are less suitable for producing essential oils. They are a key ingredient in Indian curries and spice blends such as garam masala and are known locally as 'Dhania' (coriander in Hindi).

India has a robust processing infrastructure for spices, with over 850 registered exporters. [Spices Board India](#) is the key organisation responsible for developing and promoting Indian spices, serving as a bridge between Indian exporters and international importers. The Board has established eight spice parks in the core growing regions in India, with processing and value-addition facilities. It allocated land to spice manufacturers and exporters to establish their processing units in these parks.

Several international companies have set up joint ventures and processing facilities in India. For example, the Dutch company [Nedspice](#) has an integrated supply chain with a factory and warehouse in Cochin (the centre of the spice trade industry in India), processing units in Palakkad and Kadapa, and a buying station in Rajasthan.

In India, the majority of the coriander seeds are produced in [Madhya Pradesh \(47%\)](#), followed by [Gujarat \(27%\)](#), [Rajasthan \(16%\)](#), and [Assam \(3.9%\)](#).

Ukraine: increased area between 2020 and 2023

In 2023, Ukraine exported 2.2 thousand tonnes of coriander seeds worldwide, 1.7 thousand tonnes of whole coriander seeds and 493 tonnes of crushed/ground coriander seeds. Most (68%) coriander seeds were exported to Europe.

Between 2019 and 2021, Ukraine's exports to Europe grew from 1.9 thousand tonnes to 3.2 thousand tonnes. However, imports began to decline in 2021. Particularly in 2023, there was a significant drop of 45%, reducing the exported volume to 1.5 thousand tonnes. Over the five-year period, Ukraine experienced an average annual decline of 5.9% due to the war with Russia, the largest decline among the top supplying countries to Europe.

Ukraine's most important destination markets in Europe are Germany (25%), Czechia (23%), the United Kingdom (21%), and Poland (14%). Ukraine lost market share in the German market; its exported volume dropped from 848 tonnes in 2019 to 380 tonnes in 2023. In the other three markets, Ukraine increased its volume. In 2019, it exported zero coriander seeds to the United Kingdom, while in 2023, it exported 320 tonnes. In Czechia, it has become the leading supplier, increasing its market share from 13% to 60%.

Ukrainian coriander seeds are recognised for their good quality and high essential oil content. In Ukraine, coriander seeds are grown in 12 regions. The most important regions, in order of importance, are Mykolaiv, Odesa, Poltava, and Kharkiv. The country [has increased its area for coriander production](#) from 6.6 thousand hectares in 2020 to 8.3 thousand hectares in 2023 (+25%). The interest in this crop is driven by agricultural producers' desire to diversify their businesses and the strong demand for this crop abroad.

Morocco: losing ground in the Netherlands but diversified exports to other countries

Coriander is Morocco's main export spice, along with sweet pepper and saffron. In 2023, Morocco exported 1.2 thousand tonnes of coriander seeds to Europe. Exports have declined slightly in the past five years, with an average annual decline of 4.4%.

Morocco's primary export destination in Europe is the Netherlands, representing 32% of its total exports. However, the volume of exports to the Netherlands has declined by approximately 50% over the whole period due to its relatively high coriander prices, causing Morocco to drop from the leading supplier to third position. Other main destination markets include France (19%), the United Kingdom (14%), Belgium (12%), and Switzerland (9.9%).

Morocco is the leading supplier in Belgium and Switzerland. While these are relatively small markets for coriander seeds, the Swiss market is an important organic spices market, and Morocco also exports organic-certified coriander seeds.

Like India, Morocco cultivates the larger variety of coriander known as *Coriandrum sativum vulgare*, though the Moroccan coriander seeds are round rather than oval. Coriander seeds play a vital role in Moroccan spice blends like ras el hanout and are frequently used in dishes such as couscous and tagines. In Morocco, coriander seeds are mainly grown in the area between Casablanca and Tangier, north of Kenitra. Some coriander is grown around Casablanca. The seeds are harvested in June and July.

Tips:

Visit European trade fairs to keep an eye on your competitors, such as [ANUGA](#), [SIAL](#), [Biofach](#) and [Food Ingredients](#). Scan your competitors and investigate how they promote themselves in the European market.

Check how your national export promotion agency can help you with exports to the European market. For example, the [Spices Board India](#) is responsible for the development and promotion of Indian spices and helps Indian exporters connect with buyers in the international market.

Which companies are you competing with?

For the Microcarpum variety, you are in competition with companies from Russia, Bulgaria, and Ukraine. In the case of the Vulgare variety, your competitors include firms from India and Morocco. Below, we outline several companies from these countries that export coriander seeds to the European market.

Swani Spice from India: ambitious sustainability programme

[Swani Spice](#) produces whole spices, spice powders, and spice blends. It exports the spices to over 30 countries, including European markets such as the United Kingdom, the Netherlands, Germany, and France.

Sustainability is embedded in the company's core values. It has created 'The Green Footprint Programme' to improve, clean, and enhance traceability and transparency throughout the food chain. Moreover, they developed the traceability app [Agreeta Solutions](#) to promote Farm-to-Fork Traceability and Sustainability, allowing consumers to trace the origin of their food.

Currently, 29 of their products are part of the Sustainable Farming programme, producing 12,500 metric tonnes of spices annually. By 2025, Swani aims to increase the volume of Sustainably Farmed and Certified products to 15,000 metric tonnes. The company holds multiple certifications, such as BRCGS, Sedex, Rainforest Alliance, EU organic, Kosher, and Halal.

Sumyfitofarmacia from Ukraine offers a huge range of dry herbs and plant materials

[Sumyfitofarmacia](#) specialises in the production and processing of dry herbal raw materials and spices tailored to the pharmaceutical and food industries. Their customers include major pharmaceutical companies and tea manufacturers, as well as traders in the pharmaceutical and food sectors. The company is both ISO 9001:2015 and ISO 22000:2018 certified and also has organic certification. They export their products to different markets in Europe, but also to Asia and America.

Agrin Maroc from Morocco: leading Morocco's exports of seeds, spices, and herbs

[Agrin Maroc](#) is Morocco's largest producer and processor of herbs, spices, and seeds. The company has a strong focus on [social and environmental sustainability](#) and is focused on sustainable production:

- They ensure the welfare of their suppliers and collectors through social responsibility programmes.
- They put strategies in place to recycle and reuse organic and inorganic materials.
- Clean energy: since 2021, Agrin Maroc has converted 60% of its energy consumption into renewable energy sources.
- The company uses Rainforest Alliance and organic-certified production.
- For 2025, the goal is to buy at least 25% of the materials from sustainable partners and to be a zero-waste

company.

Tip:

Ensure that your coriander seeds meet the high safety and quality standards demanded by European buyers while keeping prices competitive. Offering seeds with distinct flavours or high essential oil content will help your product stand out, especially in markets such as Germany and the United Kingdom, where flavour retention and seed quality are critical.

Which products are you competing with?

Coriander seeds have a unique flavour and, therefore, cannot be replaced by other products easily. For cooking, the three best substitute spices are cumin, caraway, and fennel.

Cumin seeds have a warm, earthy flavour, however also a more bitter and smoky taste than coriander. Caraway seeds have a similar flavour profile to coriander seeds: earthy and slightly sweet. However, caraway is less versatile than coriander because of its anise flavour, which can be overpowering. Fennel and coriander both have an earthy flavour with a slight citrus note. However, fennel offers a more licoricey and sweet flavour.

Tip:

Read [CBI's study on the demand for spices and herbs in the European market](#) to learn more about which spices are in growing demand and which are potential competitors to coriander seeds.

4. What are the prices of coriander seeds in the European market?

Prices for coriander seeds in Europe are available at the retail level and at the import stage.

Consumer prices

Shelve prices of coriander vary a lot. Smaller packages are relatively expensive (15-40g), and if these are made of glass, then they are even more expensive. In mainstream and organic supermarkets, whole and ground coriander seeds are typically sold in small packages.

Shelve prices of whole and ground coriander seeds range from €23 to €120 per kg. Larger packaging sizes can mostly be found in British mainstream supermarkets for prices between €5 and €18 per kg.

Table 1: Consumer prices of coriander seeds in large European supermarkets (price per kg, in €)*

	Whole coriander seeds	Ground coriander seeds
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The United Kingdom	45.23 – 119.03 Large packages: 7.14 – 15.47	33.07 – 98.80 Large packages: 5.36 – 17.86
Poland	23.12 – 43.43	30.24 – 69.07
Germany		55.94 – 91.60
The Netherlands	113.75 – 116.25	39.60 – 112.50
France	96.15 – 118.19	49.38 – 119.67 Large packages: 9.50 – 12.90
Romania	56.98 – 66.88	34.42

Source: [GloballyCool](#), July 2024

Import prices

Between 2019 and 2023, European import prices went up by an annual average of 7.0%. In 2019, the average import price in Europe was €1.30 per kg, whereas in 2023, this was €1.70 per kg.

Import prices can differ greatly from one importing country to another. The lowest import prices are observed in the eastern European countries of Poland and Romania due to their role as hubs for the coriander seeds trade in eastern Europe. The other leading importing countries are all at the same price level, with import prices ranging between €1.71 and €1.85 per kg.

Figure 8 reveals that prices of Russian coriander are the lowest in the European market, followed by Ukrainian coriander. Coriander from India and Morocco is among the most expensive. Prices of Moroccan coriander went up in 2023 because of lower volumes available for the European market that year.

Source: [GloballyCool](#), July 2024

Price breakdown

Margins within the coriander seed supply chain vary widely. Many factors determine the prices and margins, such as quality, variety, origin, costs of adding value, and taxes. Because of this, the price breakdown below serves as a very rough indication or example only.

In the below price breakdown, the consumer price is €75 per kg for coriander seeds sold in small containers (15-40g) in European supermarkets.

Source: [GloballyCool](#), July 2024

Tip:

Consider subscribing to [Expana](#); the leading agrifood price reporting agency, to get insight into the price data of coriander seeds and other spices and herbs.

[GloballyCool](#) carried out this study on behalf of CBI.

Please review our [market information disclaimer](#).