

The European market potential for fresh chilli peppers

Last updated:

15 April 2025

The chilli pepper market is varied, with an increasing interest in exotic varieties thanks to multi-ethnic influences. Chilli peppers can generate attractive incomes but it is not an easy market to access. If you intend to export your chilli peppers to European customers, you must be sure that your products respect European phytosanitary regulations and that they do not contain excessive pesticide residues.

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1. Product description

Chilli peppers belong to the *Capsicum* genus. Chilli pepper is the generic name for the plant and fruit. It is an herb that can reach a height of 1 to 2 meters. Chilli peppers are native to Central and South America, but today they are widely available worldwide. The plant leaves are medium green, arranged alternately in an oval or lanceolate shape. The flowers are generally white, sometimes tinged with yellow, green and violet. The fruit contains small cream-coloured seeds. It is probably one of the most varied fruits in shape, colour and power of taste. Fresh or chilled fruits of the genus *Capsicum* or pimenta (Chilli peppers) are categorised under HS code 07 09 60 99 in the Harmonised System.

The strength of chilli peppers is determined by the plant's content in capsaicin. The pungency of chilli peppers is measured according to the Scoville Heat Unit (SHU). There are five main domesticated species, each with various varieties or cultivars. The species most commonly available on the European markets are:

1. *Capsicum annum*. This is the most common and widely-cultivated species of chilli peppers. It includes both mild and hot varieties and is used worldwide. Fruit size can vary between 5 to 15 cm depending on the variety. This species includes varieties such as:
 - Cayenne
 - Jalapeño
 - Serrano
 - Hungarian wax
 - Bird's eye (Thai pepper)
2. *Capsicum frutescens*. This species includes some of the spiciest chilli peppers. They are known for their pungency and small size (1 to 3 cm). Their colour can range from pale green to bright red by way of golden or lemon yellow in certain varieties. This species includes varieties such as:
 - Tabasco
 - Malagueta
 - Peri Peri (or African bird's eye)

3. *Capsicum Chinense*. This species includes some of the hottest peppers in the world, often with complex, fruity, and tropical flavours.
 - Habanero (100, 000-350,000 Scovill units)
 - Bhut Jolokia (or Ghost Pepper)
 - Trinidad scorpion
 - Naga
 - Scotch Bonnet
 - Carolina Reaper, said to be the hottest pepper in the world 2 (over 2 million Scoville-Heat Units)
4. *Capsicum baccatum*. This species is known for its fruity flavour and is very popular in South American cuisine. It includes varieties such as:
 - Aji Amarillo
 - Aji Limo
 - Bishop's crown
5. *Capsicum pubescens*. This species is unique for its hairy leaves and black seeds, as well as its ability to grow in cooler climates. It includes varieties such as:
 - Rocoto
 - Manzano

Frutas Hortalizas provides an extensive [overview of the *Capsicum Annuum* varieties](#).

Figure 1: Peri Peri (1), Bird's eye (2), Habanero (3), Rocoto (4) Aji Amarillo (5)



Sources: Thierry Paqui (1, 2 and 3). Amazon (4 and 5)

2. What makes Europe an interesting market for chilli peppers?

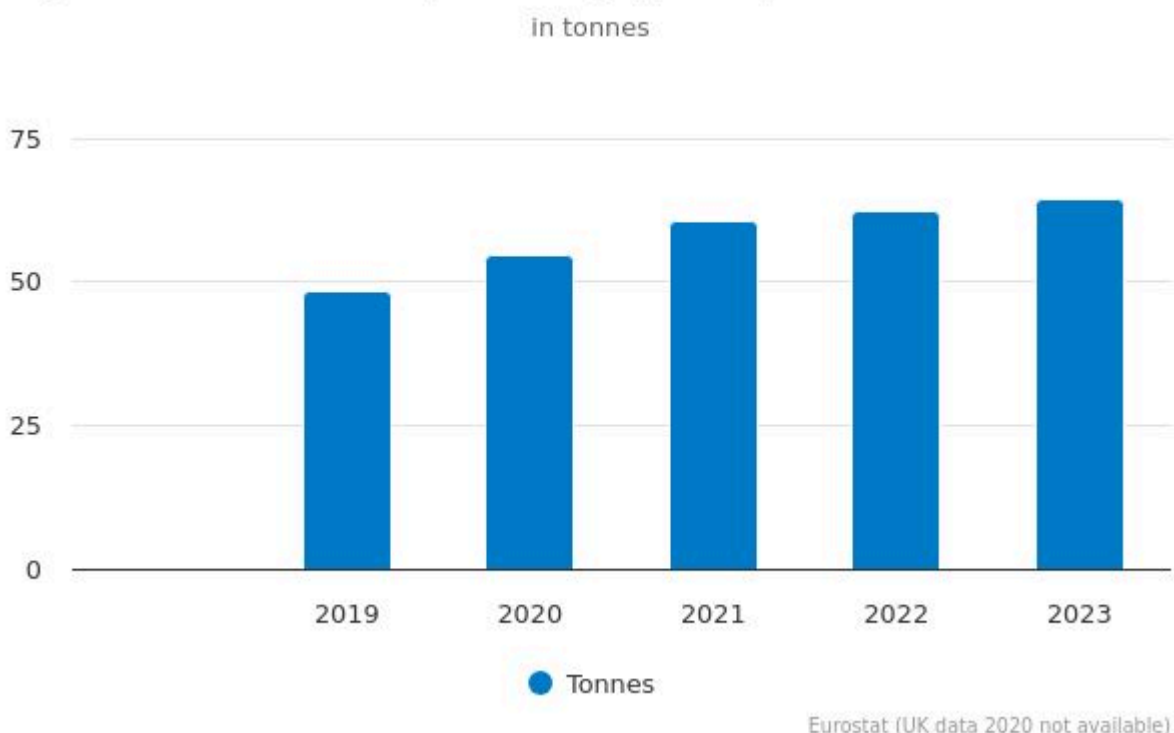
In Europe, demand for chillies is not seasonal, but annual. Consumers' tastes are evolving and push them to try different cuisines (Indian, Asian, African and South American) where chilli peppers are often used. Non-European suppliers play a key role in supplying the market.

A growing demand that relies on imports

Only a few European countries produce chilli peppers. Europe therefore depends on imports from third countries to meet its chilli pepper needs. Between 2019 and 2023 European imports of chilli peppers rose steadily from 48,500 tonnes to more than 64,000 tonnes. This represents an increase of almost 33% over the period. Morocco and Türkiye are the main non-European suppliers of this market. During that period (2019 to 2023), France, Romania, Spain, and the United Kingdom were the main European countries that imported chilli peppers from Morocco and Türkiye.

The consumption of chilli peppers is increasing in Europe. Buyers have access to a wide range of choices in ethnic stores and mainstream supermarkets. In the coming years, the demand for chilli peppers should continue its steady growth.

Figure 2: Evolution of European chilli peppers imports from third countries



Source: Eurostat and Trade Map 2024

A steady rise in the cost (CIF) of chilli pepper imports

The European chilli pepper market is very competitive. Chilli pepper production is very sensitive to residue levels. As a supplier of chilli peppers, you must ensure that your products comply with European regulations on maximum residue limits (MRLs). The interest of European buyers in organic products continues to grow, so this is a way for you to establish yourself in this very selective market.

Over the past five years, the average cost (Cost Insurance and Freight - CIF) of a tonne of chilli peppers imported from non-European countries has increased. In 2019, the average cost of peppers was 1.376€/ton. In 2023, this cost was 1.630€/ton, which represents an increase of just over 18% (see Figure 3).

Figure 3: Average cost of a tonne of chilli peppers in the European Union (EU)



Source: Eurostat 2024

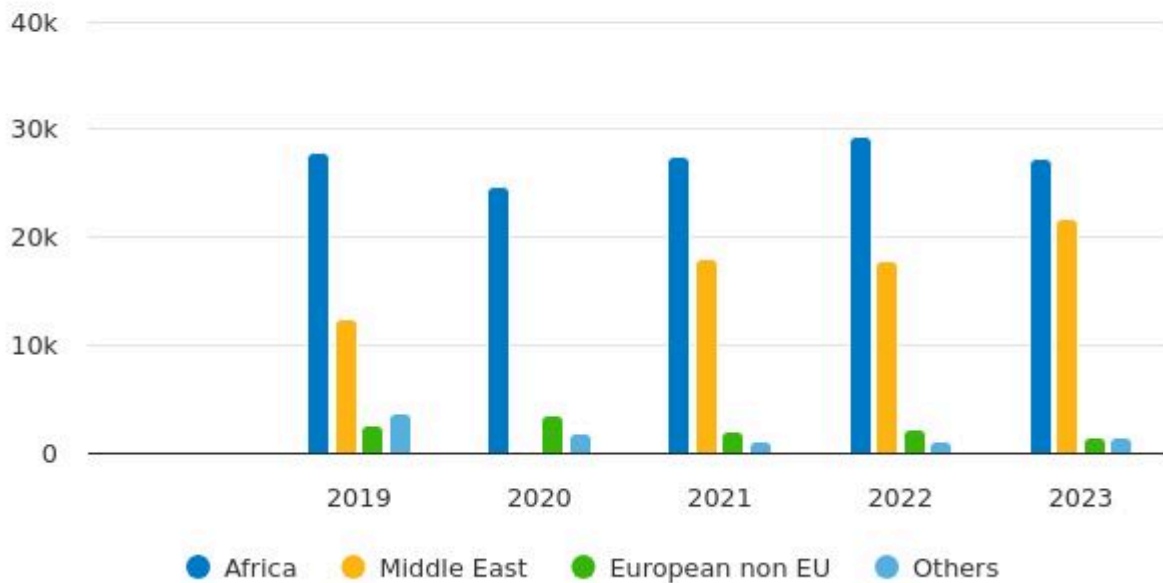
Complementary imports mainly come from Africa and the Middle East

Only a few European countries (Spain, Italy, Hungary, Greece and France) have regions where they can produce chilli peppers. To satisfy the market's demand for fresh chilli peppers, Europe depends on imports from third countries.

In 2023, the main imports of chilli peppers (more than 91%) from outside the European Union came from Africa (mainly Morocco), and the Middle East (mainly Türkiye). In 2023, Morocco accounted for more than 94% of chilli pepper exports from Africa while Türkiye accounted for 99% of exports originating from the Middle East.

Figure 4: European imports of chilli peppers

in tonnes per region



Source: Eurostat 2024

Ethnic diversity offers potential for chilli peppers

Not many cooked dishes in Europe use chilli pepper as a seasoning. A few examples include arrabbiata sauce from Italy, patatas bravas from Spain, peri peri chicken from Portugal, and goulash from Hungary.

In the European Union, over 35 million people were born outside of the EU, and nearly 6 million in the UK share that background. The rise in chilli imports to Europe is largely due to its popularity in ethnic cuisines from Asia, Africa, and Latin America. Countries like France, the UK, Spain, Portugal and the Netherlands, which have significant ethnic communities, are the biggest consumers of chilli in Europe (see table 1). Germany and Italy, which have also seen a growth in their ethnic populations, are starting to import more chilli peppers too.

The most common type of chilli pepper is the red cayenne (*Capsicum annum*), but there are also more exotic varieties like bird's eye chilli, peri peri, and bonnet chilli.

Table 1: Typical consumers of different chilli pepper varieties and their populations in Europe (2019)

| Chilli pepper variety | Typical consumers | EU inhabitants born in other countries (examples) |
|---------------------------|---------------------|---|
| Bird's eye pepper (rawit) | Thailand, Indonesia | 42,000 Thai in Sweden 115,000 Indonesians in the Netherlands |

| | | |
|--------------------------------|--|---|
| African Bird's Eye (peri-peri) | Uganda, Ethiopia, Mozambique, among others | 233,000 East Africans in Italy |
| Bhut Jolokia | India | 845,000 Indians in the UK |
| Scotch bonnet | West Africa (and Caribbean) | 208,000 Nigerians in the UK 156,000 Senegalese in France 387,000 West-Africans in Italy |
| Jalapeño, Habanero | Mexico, Caribbean | 58,000 Mexicans in Spain |
| Ají | Peru | 217,000 Peruvians in Spain |
| Madame Jeanette | Surinam | 178,000 Surinamese in the Netherlands |

*population data based on Eurostat (incomplete data) – actual populations are larger when including 2nd and 3rd generations

Tips:

Focus on the countries with the type of consumers that are most likely to buy your specific chilli pepper.

Follow the market developments on different news websites and information sources such as [Freshplaza](#), [Eurofruit](#), [FreshFruitPortal](#) and [Fruitrop](#) (full access only through membership).

3. Which European countries offer the most opportunities for chilli peppers?

Only a few European countries (Spain, Italy, Hungary, Greece, Portugal and France) produce chilli peppers. Europe must therefore supplement its production with imports from non-European countries. In Europe, chilli consumption is higher in certain countries. It is influenced either by the presence of large ethnic communities or by eating habits. The main European countries that import chillies are France, the UK, Germany, Spain, Romania and Bulgaria. In the latter three chilli peppers are an integral part of local eating habits.

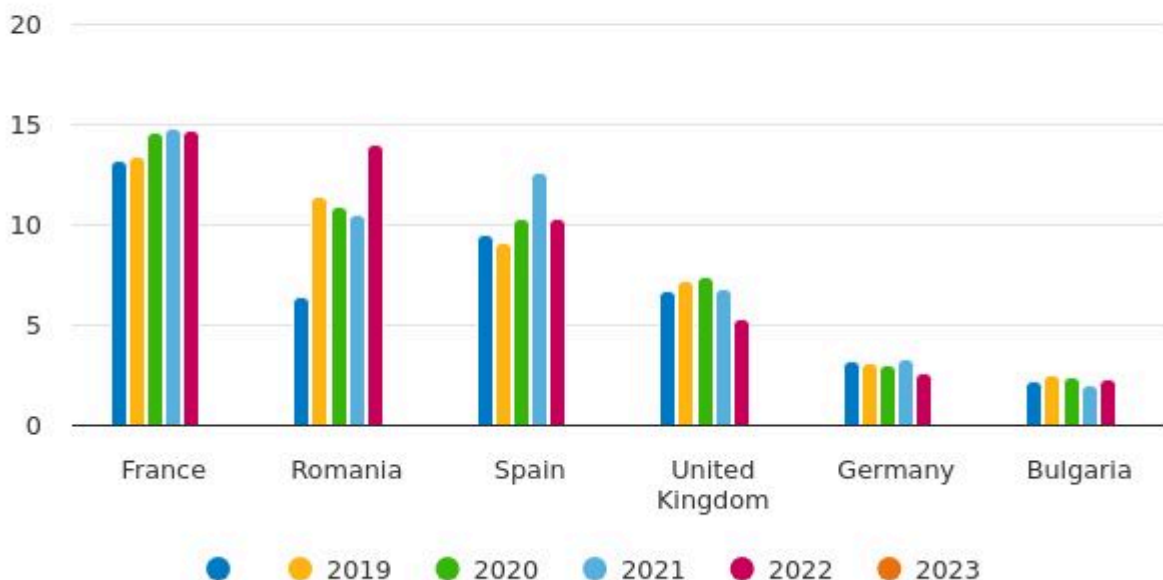
Demand for chilli peppers is set to rise, thanks to the cooking preferences of various ethnic groups and some European communities. The considerable interest of European consumers in global cuisines like Indian, Thai, and Mexican is likely to boost chilli pepper consumption even more. In the short term (1 to 3 years), demand for organic products should also continue to rise. European buyers appreciate healthy products grown with fewer chemicals and are willing to spend extra on them. They are likely to continue to be drawn to Fairtrade-certified crops, which support small-scale farming.

In the long term (more than three years), sustainability concerns are likely to play a greater role in the choices

made by European consumers. Suppliers who adopt sustainable agricultural practices will be better placed to meet the future demands of environmentally-conscious European consumers. Likewise, carbon neutrality should become more important in the choices made by European consumers. These choices should then benefit those producers closest to European markets who can supply them by land rather than by air, for example.

Figure 5: Main European countries importing chilli peppers from third countries

in tonnes



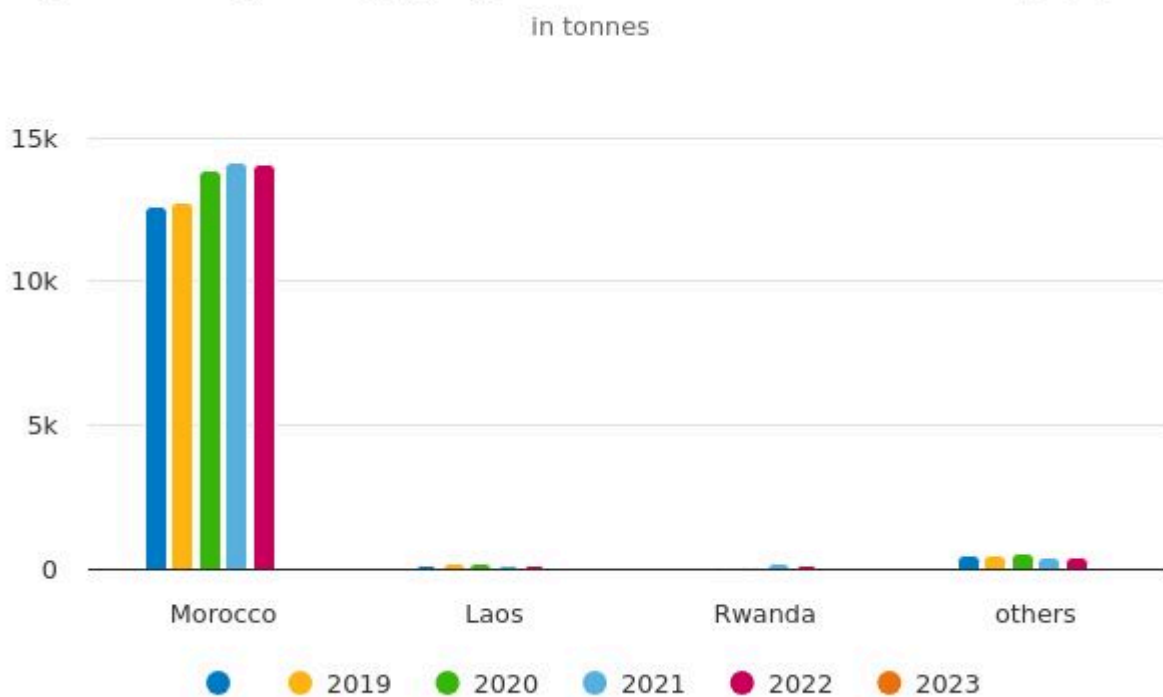
Source: Eurostat/Trade map 2024

France: leading importer with dominant supply from Morocco

In 2023, France was the leading importer of chilli peppers from non-European countries. It accounted for 30% of chilli pepper imports from third countries with more than 14,000 tonnes imported.

Over the last five years, France has been the most dynamic market in terms of direct chilli pepper imports. During this period, its imports increased by almost 12% from more than 12%, from 12,678 tonnes imported in 2019 to 14,298 tonnes imported in 2023.

Figure 6: Origins supplying the French market with chilli peppers



Source: Eurostat 2024

In 2023, French imports of chilli peppers came mainly from Morocco. With slightly more than 14,000 tonnes, Morocco is the dominant supplier for the French market (more than 98% of the market share).

In 2023, two countries of origin, Laos and Rwanda, completed the supply of chilli peppers to the French market. The volumes exported by these two countries, despite being low, show their strong rise. Between 2019 and 2023 exports from Laos grew by 60%, while those from Rwanda grew by more than 66% between 2021 and 2023.

Most chilli peppers are the usual red and green types, like cayenne. Cayenne pepper is a popular spice in northern African cooking, and France has a significant Moroccan community, with about 1 million residents born in Morocco. Additionally, around 1.4 million people are from Algeria.

In traditional French cooking chilli peppers are not widely used, except for a local type known as 'Piment d'Espelette' from the southern part of France. Other varieties, such as white and green peppers, can be found at [Grand Frais](#). In wholesale markets and specialty shops, you can also find Habanero (called 'piment lanterne') and Bird pepper (known as 'piment oiseau'). On the islands of Mauritius and Réunion, bird pepper is commonly used in various dishes.

Even though chilli peppers are not a major part of French cuisine, the country's ethnic diversity will continue to create demand for them.

Tips:

Try supplying varieties other than those usually found in the French market and that have special characteristics (aroma, pungency). Explain to your partners (wholesalers and/or importers in France) how these varieties are appreciated in your country and how they can also appeal to buyers in European countries.

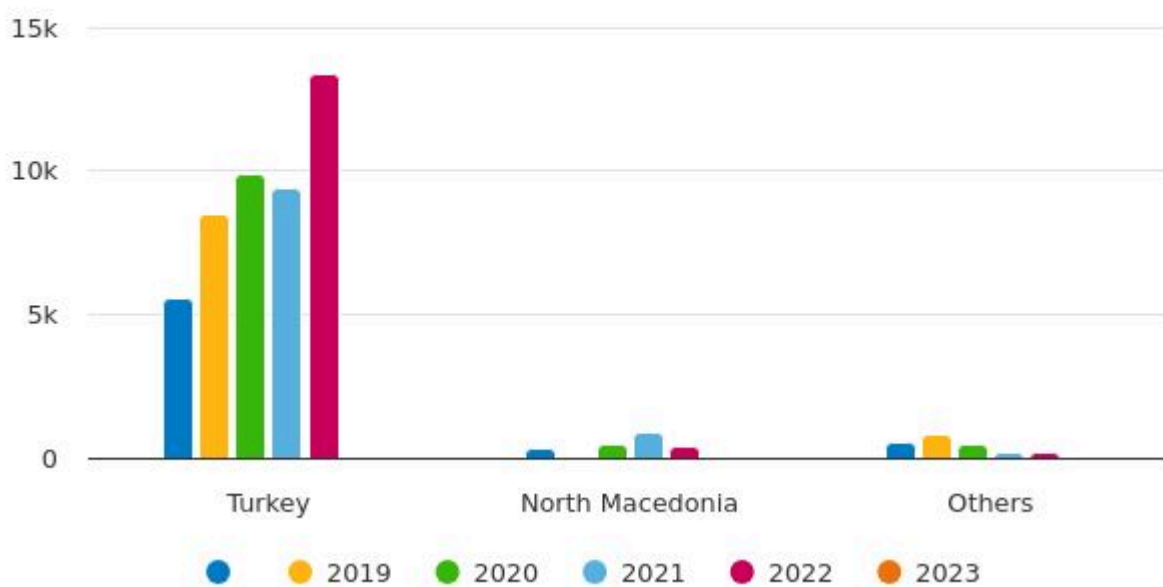
Activate the "Translation" function of your browser to make foreign hyperlinks available in your own language or change to an English version.

Romania: a growing market that depends on imports for supply

Romania has a long tradition of consuming chillies, which are used to cook stews and goulash. Romania has a limited production of chilli peppers, so it has to import them to satisfy a rapidly-growing demand. Between 2019 and 2023, Romania's direct imports of chilli peppers rose from 6,370 tonnes to 13,915 tonnes, an increase of more than 118%.

Figure 7: Origins supplying Romania with chilli peppers

In tonnes



Source: Eurostat 2024

Romania imports most of its chilli peppers from Türkiye. Between 2019 and 2023, chilli pepper imports from Türkiye rose from 5,533 tonnes to 13,359 tonnes, an increase of more than 141%. In 2023, chilli pepper imports from Türkiye accounted for more than 96% of the market share in Romania. These imports came at the expense of those from Northern Macedonia, the other origin from which Romania obtains its supplies. In fact, in 2019, North Macedonia accounted for 4% of the market share, compared with 86% for Türkiye. In 2023, North Macedonia's chilli pepper exports to Romania only accounted for 2%. Romanian chilli pepper importers focus on regional suppliers.

Spain: both a strong producer and importer of chilli peppers

Spain is the third-largest importer of chilli peppers from third countries. In 2023, Spain imported 10,224 tonnes of chilli peppers from Morocco. In 2023, exports of chilli peppers from Morocco to Spain had a market share of over 98%. In 2023, Spain also imported additional consignments from Honduras (73 tonnes) and Peru (42 tonnes). Spanish chilli peppers heavily rely on Morocco to complete their supplies of chilli peppers; however,

they are also open to other suppliers from Spanish-speaking countries.

Spain produces and imports chilli peppers. The most popular type is the red cayenne pepper (*Capsicum Annuum*), along with several local varieties that are usually milder than the more exotic ones. Many Spanish chilli peppers are dried or preserved to make them last longer.

Some common local chilli peppers in Spain are:

- The Padron, a green pepper that can be spicy or mild.
- The Ñora, a small, round sweet chilli from the Murcia and Alicante regions, often used in romesco sauce.
- The Pimiento Jaranda and Choricero, which are used in chorizo sausages and stews.
- Guindilla, a general term for chilli pepper, usually referring to long green ones that are often pickled.

As the Latin American population in the EU increases, the demand for exotic chilli pepper varieties is expected to continue improving.

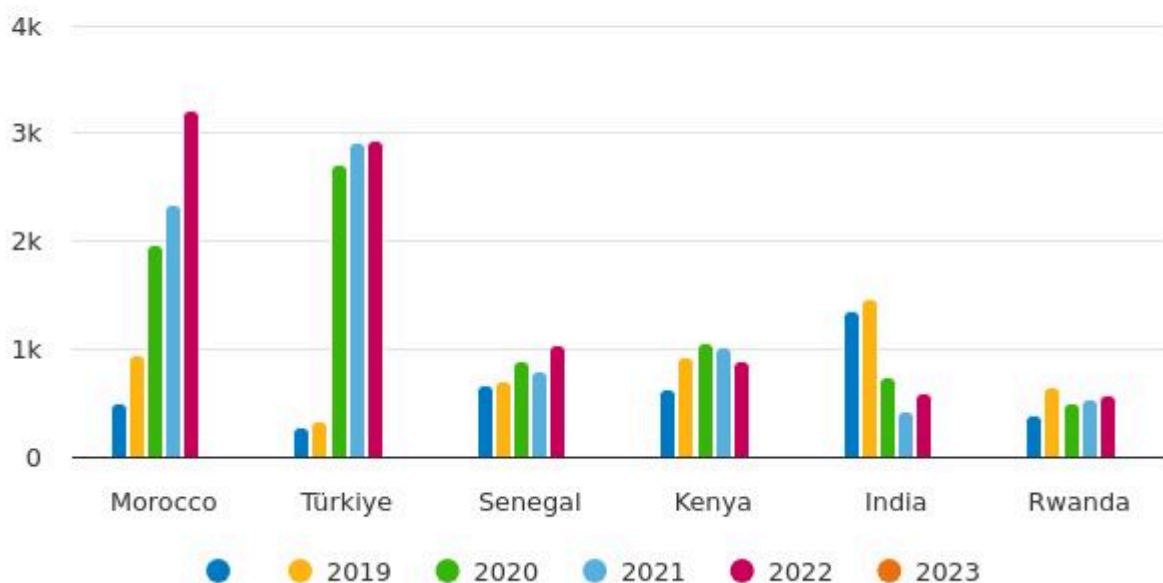
United Kingdom: more export opportunities after Brexit

The United Kingdom has a unique market for exotic chilli peppers. The blend of different ethnic groups and British people who have developed a taste for spicy food creates a steady demand for imports. Chilli peppers are commonly used in traditional dishes from Indian and Pakistani cultures, like curries, which are also popular among many British people. Additionally, a significant number of immigrants from Nigeria enjoy spicy food. For them, chilli peppers like Scotch Bonnet, Cayenne, and Peri Peri (African Bird's Eye) are important for a good quality of life and vitality.

Chilli pepper imports by air are expensive. This certainly explains why Spain and Morocco are the two main sources of fresh chilli for this market as they can supply it by road. Despite Brexit, the UK continues to import large volumes of chillies from Spain. Morocco and Türkiye have also increased their agricultural teamwork since Brexit. This is especially important because both countries can send fresh chillies over land. The United Kingdom is an interesting market that can be supplied by any country that can transit by road via France or by air from African or Asian countries. This also creates opportunities, for example, for Senegal, Kenya, India and Rwanda (see figure 8).

Figure 8: Origins supplying the UK market with chilli peppers

in tonnes



Source: Trade Map 2024

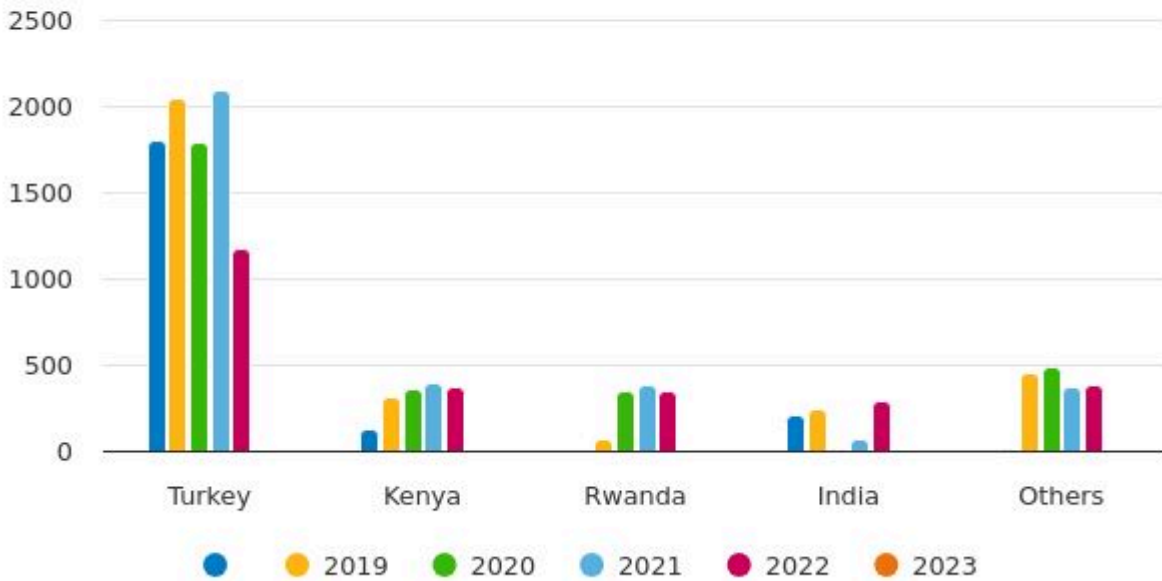
Germany: a diversified source of supplies

Several origins supply the German market with fresh chilli peppers. In 2023, the four main origins were Türkiye, Kenya, Rwanda and India. In 2023, Türkiye exported 1,169 tonnes of fresh chilli according to Eurostat, accounting for 46% of the market. Türkiye has lost market share, despite having a large Turkish community in Germany, but remains the leader in the market. Their decline was not compensated by other supplying countries, so the total import volume declined. This is different from other European countries that Türkiye sells to.

With 367 tonnes exported in 2023, Kenya had a 14% market share, compared to 2019 when it exported 124 tonnes. Kenya has seen a growth of 195%. Rwanda (13% market share) is following a similar pattern, exporting 67 tonnes in 2020 and 339 tonnes in 2023, an increase of over 400%. India, which ranked fourth in this market in 2023 with 262 tonnes, accounts for a market share of just over 11%, and its exports grew by 34% between 2019 and 2023. Germany seems to be a market that is more welcoming to exports (from Türkiye, Africa and Asia), even though the amounts consumed are less than in the countries listed earlier.

Figure 9: Origins supplying the German market with chilli peppers

In tonnes



Source: Eurostat 2023

German consumers do not favour spicy foods, but the growing international community is boosting the demand.

In the German diet, chillies are mainly used in the form of dried chilli, for example as a spice in meat processing, such as sausages. Apart from that, spicy foods are rare. Much of the consumption of chilli could be linked to the influence of international populations (Turks, Kurds, Asians). Spicy chillies such as Habanero are available from Asian retailers such as Spice Village.

Bulgaria: Large traditional consumption

Bulgaria has a population of just 7 million people. Even with its small size, it ranks as the sixth largest importer of chilli peppers in Europe from outside the continent. The country has a lot of different spicy foods that use chilli peppers, like stews, soups, and vegetable side dishes. In 2023, most of Bulgaria's chilli pepper imports, totalling 2,278 tonnes, came from Türkiye, which made up 99% of the market.

Tip:

Prioritise the markets that are best known to import from your country of origin. As a supplier from Türkiye or the Balkan region, your easiest market entry will be in the eastern part of Europe. For northern Africa, Spain and France provide the most potential, while long distance suppliers may find their best chances in Northwestern Europe (UK, France, Benelux countries) – good air-freight connections play an important role in long-distance trade.

4. Which trends offer opportunities or pose threats in the

European chilli pepper market?

European consumers are increasingly open to cuisines from around the world, many of which use chilli peppers as a seasoning. Chilli is becoming more popular because there is more discussion about how eating it in moderation can be good for your health.

A growing interest in world cuisine

A growing ethnic population in Europe is boosting chilli pepper consumption, while at the same time their cuisines are exerting a significant influence on the rest of the population.

Traditionally, chilli pepper consumption is more common in southern and eastern Europe (in countries like Spain, Portugal, Romania and Bulgaria). Although spicy dishes are less common in north-western Europe, interest in home cooking is growing and European consumers are learning to discover and prepare not only European dishes that use chillies (goulash, arrabiata sauce), but also spicier dishes (Indian, Asian, African or Mexican cuisine).

European consumers' interest in world cuisines is opening up opportunities for suppliers of different varieties of chillies in addition to the usual red and green peppers, such as Habanero, Jalapeño, Bird's-eye (Asian and African), Madame Jeanette and even highly specialised varieties such as Peruvian Rocoto and Ají Amarillo.

Asian supermarkets and international restaurants play an important role in increasing consumer knowledge and promoting certain varieties of chillies. As an exporter, you can also help to increase buyers' knowledge by taking part in trade fairs (Fruit Logistica in Berlin, Fruit Attraction in Madrid).

European growers become interested in exotic chilli peppers

Exotic chilli peppers have caught the eye of greenhouse farmers in Europe because of the rising demand for them and the need for more sustainable options. Retailers and consumers see local growing as a good thing, but it can also help boost imports from other countries. More supply can lead to more people wanting to buy.

Thanks to innovative companies like Westland Peppers in the Netherlands, the variety of chilli peppers available in Europe is growing. Peppers like Jalapeño, Scotch Bonnet, and Naga Jolokia (also known as Ghost pepper) are now being cultivated in Europe. These peppers are grown in Dutch greenhouses from April to November, and during the rest of the year, they work with farmers in Spain and Morocco.

While local farming might limit some chances for suppliers from far away, many traditional consumers and importers still argue that the authentic taste of chilli peppers from tropical regions is hard to beat. The interest from European growers in these exotic peppers can actually help promote them, which is good for this niche market. In the end, both local and international suppliers can stand to profit from this situation, as local production grows alongside increasing local demand.

Figure 10: Chilli pepper display in French supermarket [Grand Frais](#)



Source: Photo by Thierry Paqui

Greater attention to health food

More and more people in Europe are realising the importance of healthy eating and are focusing on what they eat. Besides making food taste better, chilli peppers are also becoming popular for their health benefits. They actually have more vitamin C than oranges, which is great for boosting the immune system. The heat from chilli peppers comes from a substance called capsaicin, which might help with weight loss by making you feel less hungry, so you eat fewer calories.

By highlighting these health advantages, you can attract customers who want to improve their diets. One effective way to make your product stand out is by offering organic chilli peppers. Each year, more people are looking for organic vegetables. But keep in mind, growing them can be challenging because of the high risk of pests.

Growing interest in sustainability

Environmental and social issues are becoming more and more important in the supply of fresh fruit and vegetables. Social and environmental certification schemes include actions aimed at sharply reducing and registering the use of pesticides, taking action to ensure the safety of employees and producing in a sustainable way.

Certification schemes that are recognised by the [Sustainable Supply Chain Initiative \(SSCI\)](#) or the [Sustainability Initiative Fruit and Vegetables \(SIFAV\)](#) will have a higher chance of being accepted by European supermarkets.

Tips:

Promote your chilli peppers and their characteristics and use at trade fairs, and find partners that can help introduce your specific varieties. Try to work together with dedicated importers and retailers that can help increase consumer knowledge and the appreciation for these exotic products.

Check the available social and sustainability labels and certification in the [Standards Map database](#).

Read the [CBI study on trends in the European fresh fruit and vegetable market](#) to see what other trends can offer opportunities or pose threats for fresh vegetables in general.

Threats related to climate changes

Global warming is affecting the climate, which might cause problems for chilli farming in Europe and also in countries like Morocco and Türkiye. These places rely a lot on the money they make from growing chillies. If there are big disruptions in chilli supplies because of climate issues, it could lead to a significant increase in prices for both the farmers and the people buying the chillies.

Thierry Paqui carried out this study in partnership with [ICI Business](#) on behalf of CBI.

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