

# The European market potential for natural syrups

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The food and beverage industry in Europe relies heavily on syrups for various uses, creating a high demand for these products. While most syrups are currently purchased from suppliers within Europe (mainly Belgium and France), the share of imports from non-European suppliers is on the rise. Countries such as Germany, France, the UK, the Netherlands, Belgium, and Poland offer opportunities due to their substantial import volumes and populations that are looking to buy natural and healthier products more and more. Additionally, trends like sustainable sourcing, increasing health consciousness, the demand for vegan products, and the growing preference for clean-label products further boost the prospects for natural syrup exporters.

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## 1. Product description

The use of syrups is widespread in the European food and beverage industry. They serve a variety of functional and sweetening purposes. Besides sweetness, syrups serve as binding agents, to extend shelf life, add texture and stability to products, and to enhance moisture retention, among other things. Syrups are utilised in both sweet and savoury products, ranging from baked goods and beverages to sauces and condiments.

### Types of syrups

#### Glucose and fructose (starch) syrups

Syrups are typically made from glucose or fructose, or a combination of both. When the glucose content is higher than the fructose content, it is referred to as a glucose-fructose syrup. Conversely, when the fructose content exceeds the glucose content, it is known as a fructose-glucose syrup.

[Glucose and fructose syrups are plant-based ingredients](#) used in food and beverage applications. Still, they are often considered artificial sweeteners, as they are heavily processed. These syrups are derived from starch, mainly wheat and maize. Glucose-fructose syrup has a similar composition to table sugar (also called 'sucrose') which is obtained from sugar cane or beet. Depending on the composition and use of the syrup, the fructose content in glucose-fructose syrups can range from 5% to 50%. The most common glucose-fructose syrups produced in the European Union (EU) typically have a fructose content of 20%, 30% or 42%.

Glucose-fructose syrups are a widely-used ingredient in food and beverages. Aside from their sweetening

properties, they offer practical benefits such as preventing crystallisation in confectionery and improving the texture of food.

When the fructose content surpasses 50%, the syrup is classified as fructose-glucose syrup. The most common type produced in the EU contains 55% fructose. Outside of the EU, both glucose-fructose and fructose-glucose syrups are referred to as High Fructose Corn Syrup (HFCS) and are made exclusively from maize starch.

Other starch-based syrups available in the European market include tapioca syrup, sweet potato syrup, and carob syrup.

## Grain-based syrups

Examples of grain-based syrups are barley malt, corn malt, oat syrup, sorghum syrup, and rice syrup. Grain syrups have a lower sweetness than sucrose, with a sweetness level of about 0.5 to 0.8. Grain syrups can be effectively used in baked goods, cookies, breakfast cereals, and desserts.

Rice syrup is a natural syrup commonly used in the European market. It is [often used as a substitute for high fructose sweeteners](#), due to its free fructose content. It is rich in minerals such as magnesium, potassium and iron. It also has a very neutral taste, which makes it ideal for use in a wide field of products, such as bakery products, confectionery, sauces and dressings. This syrup is commonly traded under HS code 1702.30.

## Other natural syrups

The table below highlights some of the most popular natural syrups available in the European market. These syrups are used extensively in the food and beverage industry and are also available as retail products for home use.

Table 1: Examples of available natural syrups in the European market

Product	Application
Agave syrup	<a href="#">Agave has many applications</a> : from direct bottling, to use by retailers as a sweetener in a wide variety of food and beverage products. It is a versatile sweetener with different colours. Light agave syrups are heated less and undergo deeper filtration, resulting in a mild, almost neutral flavour. They are commonly used in beverages and culinary dishes. Amber agave syrups have a medium-intensity caramel flavour, making them suitable for stronger-tasting foods and drinks. Dark agave syrups are unfiltered and heated more intensively. They contain higher levels of minerals from the agave plant and have a more distinctive and even stronger taste. They are often used in desserts, as well as in poultry, meat, and seafood dishes.
Coconut flower syrup	Coconut flower syrup has a light caramel flavour. <a href="#">It has many applications</a> : it is often used to enhance desserts, and is also used in pastries and barbecue marinades. This syrup is rich in essential nutrients, including potassium, magnesium, iron, zinc, and copper.

Date syrup	Date syrup has a thick consistency, a brown colour, a strong aroma and is very sweet. Date syrup can be used as an ingredient in many ways: in anything from sauces to cereal bars and energy drinks. It is most commonly packaged in bottles for retail sale.
Maple syrup	Maple syrup is a sweetener and flavouring agent. It can be used as an ingredient in many products, such as baked goods, beverages, granolas, confectionary, desserts, and breakfast cereals. It is most commonly packaged and bottled for retail. Maple syrup contains valuable vitamins, such as vitamin C. Please note: Given that maple syrup is mainly produced in Canada and the United States, it is excluded from this analysis.
Yacon syrup	Yacon syrup is a sweetener, used in both the food and beverage industry, but it is most commonly bottled for retail sale. The syrup has a sweet taste, similar to maple syrup, but it contains fewer calories and has a lower glycaemic index. Its viscosity and texture closely resemble honey.

Source: ProFound, 2024

Figure 1: Examples of natural syrups as final consumer products: The Clearspring organic syrups range



Source: [Clearspring](#), 2024

## Trade statistics

Syrups are classified under HS code 1702 based on their fructose concentration, which determines whether they fall under codes 1702.30, 1702.40, 1702.60, or 1702.90. Although certain syrups are commonly traded under specific HS codes, these classifications can vary. Additionally, HS codes do not differentiate between distinct products within the same code, making it challenging to generalise or draw accurate conclusions about specific syrups from statistical analyses.

Table 2: HS code and its frequently included natural syrups

HS code	Description	Examples of natural syrups included
1702.30	'Glucose in solid form and glucose syrup, not containing added flavouring or colouring matter and not containing fructose or containing, in the dry state, < 20% by weight of fructose'	Wheat syrup, oat syrup, tapioca syrup, and rice syrup. From the natural syrups, rice syrup is one of the most popular in Europe.
1702.40	'Glucose in solid form and glucose syrup, not containing added flavouring or colouring matter, and containing, in the dry state, $\geq 20\%$ and < 50% by weight of fructose (excl. invert sugar)'	Date syrup is frequently classified in this category, although it is often also classified under code 2009.89 ('juice of fruit or vegetables, unfermented, whether or not containing added sugar or other sweetening matter').
1702.60	'Fructose in solid form and fructose syrup, not containing added flavouring or colouring matter and containing, in the dry state, > 50% by weight of fructose (excl. chemically-pure fructose and invert sugar)'	Agave syrup is typically included in this HS code.
1702.90	'Sugars in solid form, incl. invert sugar, chemically-pure maltose, and sugar syrup blends containing, in the dry state 50% by weight of fructose, not flavoured or coloured, artificial honey, whether or not mixed with natural honey and caramel (excl. cane or beet sugar, chemically-pure sucrose, lactose, maple sugar, glucose, fructose, and syrups thereof)'	Coconut flower syrup and Yacon syrup are often included in this category.

## 2. What makes Europe an interesting market for natural syrups?

Europe is home to a vast food and beverage manufacturing industry, demanding high volumes of syrups. By far, most of these syrups are supplied by other European countries. However, the share of imports from non-European suppliers is increasing in each category. In addition, Europe is a major organic market, and there is a growing preference for natural, healthier, and clean label products in Europe.

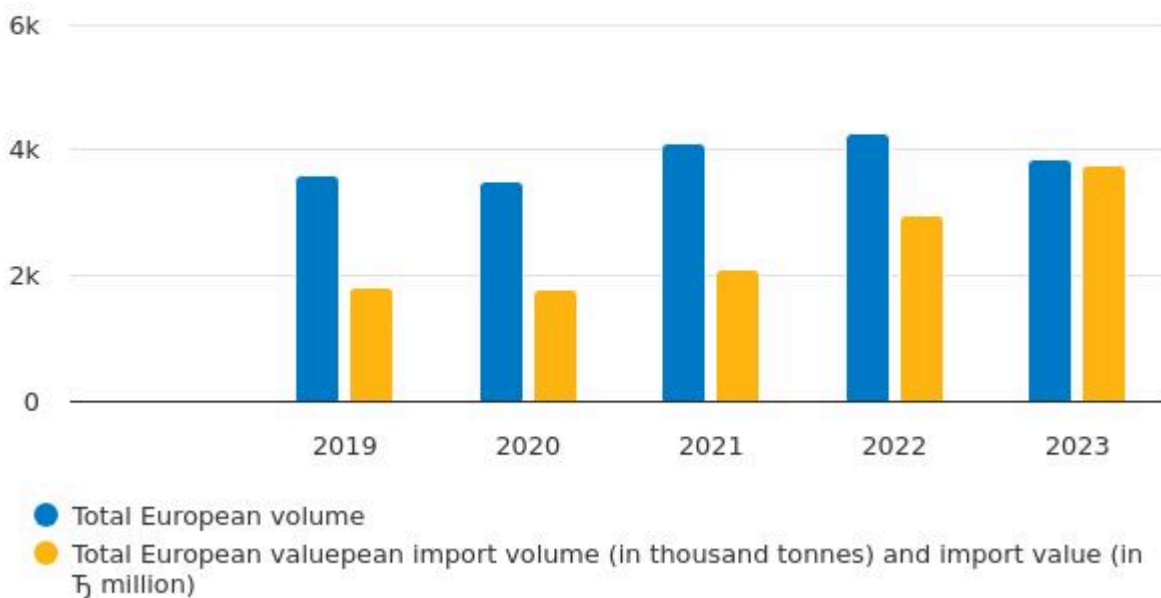
## Europe's food and beverage industry drives demand for natural syrups

The European food and beverage market is one of the largest in the world. According to Food and Drink Europe, the industry had a turnover of nearly €1,112 billion and a net contribution to the European economy of €229 billion in 2020. The size of the European market as well as its long-term growth prospects are attractive to suppliers of natural syrups. The industry uses syrups for a wide variety of purposes across a broad range of products, from beverages to both savoury and sweet food items.

Syrups are typically used as sweeteners. The food industry in Europe has started to focus more on natural syrups instead of artificial sweeteners. This shift was the result of several critical food research articles which suggested that synthetically-manufactured food products can have a negative effect on people's health. A growing group of consumers avoids products with artificial sweeteners and looks for natural products instead.

The increased use of natural syrups in several food categories in Europe is demanding significant imports of various plant-based syrups. Total European syrup imports (both natural and artificial) amounted to 3,838 thousand tonnes in 2023, at a value of €3,738 million. Between 2019 and 2023, import volumes increased at an average annual rate of 1.7% and import value increased at a rate of 19.8%.

**Figure 2: Total European import volume (in thousand tonnes) and import value (in € million)**



Source: ITC Trade Map, 2024

## Europe imports a wide range of syrups

The European food and beverage industry utilises a wide range of syrups in its products, leading to a significant demand for syrup imports. A deeper dive into the different HS codes shows:

- The largest share of imports belongs to HS code 1702.3, which includes rice syrup. Total European imports of products under this code amounted to 2,502 thousand tonnes in 2023. Between 2019 and 2023, imports increased at an average annual rate of 2.3%. European countries dominate as the primary suppliers of syrups to the European Union (EU) and the United Kingdom (UK) in this category. About 96.5% of imports came from intra-European trade in 2023. Between 2019 and 2023, however, imports from non-European

suppliers increased at an average annual rate of 54%.

The largest non-European supplier is China, accounting for 1.6% of total imports, valued at €33.4 million in 2023. While imports from China increased – from €1.8 million in 2019 – the country's share of EU and UK imports remains modest at 1.6%. After China, the largest non-European suppliers of these syrups are the United States (0.5% of total EU-28 imports), Türkiye (0.4%), Pakistan (0.2%) and India (0.2%).

- Regarding HS code 1702.4, which often includes date syrup, total European imports reached 335 thousand tonnes in 2023. Between 2019 and 2023, imports declined at an average annual rate of 3.9%. European countries dominate as the primary suppliers of these syrups to the EU and the UK in this category. Between 2019 and 2023, EU imports from non-European countries increased by 16%. Still, intra-European trade accounted for 99.5% of total EU-28 imports in 2023.

The United Arab Emirates (UAE) is the largest non-European supplier, contributing 0.2% of total imports, valued at €401 thousand in 2023 – an increase from €215 thousand in 2019. Following the UAE, Taiwan accounts for 0.1% of imports, valued at €282 thousand in 2023.

- Total European imports of products under HS code 1702.6 (including agave syrup) amounted to 240 thousand tonnes in 2023. Imports increased at an average annual rate of 1.5% between 2019 and 2023. About 24% of total EU-28 imports come from non-European suppliers, the other 76% is supplied by intra-European trade. Imports from non-European countries increased at an average year-to-year rate of 4.4% between 2019 and 2023.

The largest supplier is Mexico, accounting for 23% of total EU imports, valued at €59 million in 2023. The import value of syrups from Mexico increased at an average annual rate of 4.1% between 2019 and 2023. Other non-European suppliers in 2023 were Taiwan (at only 0.4% of total EU-28 imports), United States (0.4%), Türkiye (0.2%), China (0.1%) and Jordan (0.1%).

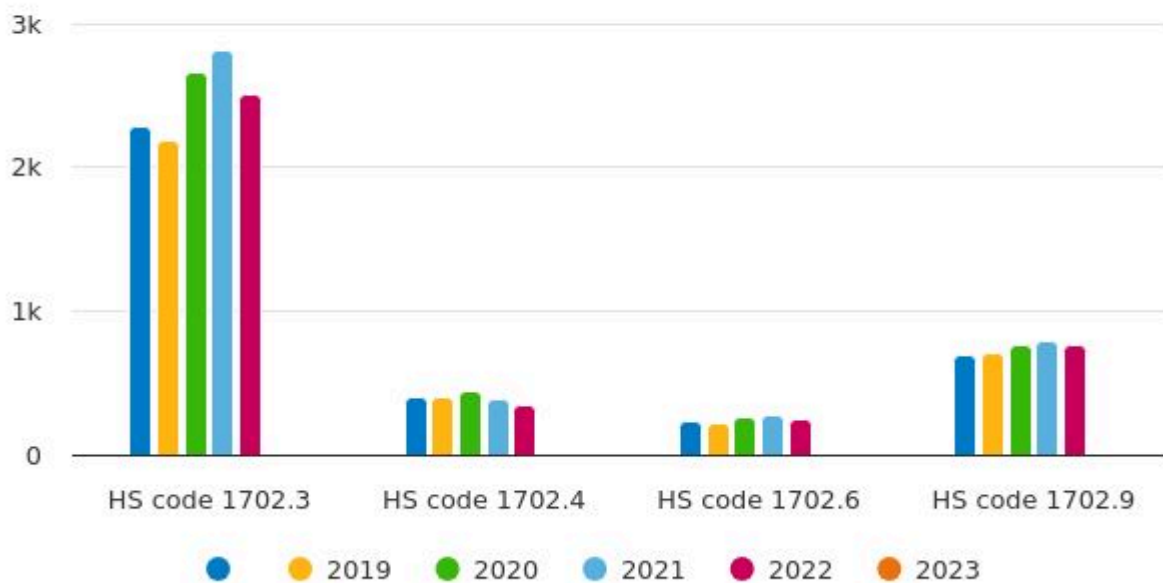
- Regarding HS code 1702.9, which includes various syrups such as coconut flower and Yacon syrup, total European imports reached 760 thousand tonnes in 2023. Between 2019 and 2023, imports increased at an average annual rate of 2.6%. Also for this code, European countries dominate as the primary suppliers to the EU and the UK. About 8.2% of EU-28 imports were supplied by non-European countries in 2023. Between 2019 and 2023, imports from non-European countries showed an average annual growth of 9.0%.

The largest non-European supplier in 2023 was China, contributing 2.9% of total imports, valued at €28.9 million in 2023 – an increase from €17.4 million in 2019. Following China, Indonesia accounts for 1.1% of import value, followed by Ukraine (0.9%), the United States (0.7%), Türkiye (0.4%), Japan (0.4%), Thailand (0.3%), and Malaysia (0.2%).

While most syrups are currently purchased from within Europe, products that cannot be grown locally are naturally-sourced from outside the region. This is for instance the case for coconut and agave syrup, which benefit from this unique position. Dates and rice are produced in European countries like Spain, Portugal and Italy, but these products' syrups are often available in larger volumes and at lower costs from non-European suppliers, creating additional opportunities for exporters. These factors make non-European syrups competitive, particularly in markets that prioritise cost-efficiency and high availability. Among the large date syrup producers are UAE, Iran and Tunisia, while large rice syrup producers are found in China, India and Pakistan, among others.

**Figure 3: European import volumes separated per HS code**

in 1,000 tonnes



Source: ITC Trade Map, 2024

Health consciousness drives the market for natural syrups in Europe

European consumers are actively seeking healthier and more natural options, which contributes to the expansion of the natural syrup market. The demand for organic syrups is also rapidly gaining popularity in the food and beverage manufacturing industry in Europe. Europe is for instance the [largest market for organic-certified agave syrup](#).

Europe holds the position of the second-largest market for organic products globally, following the US. [Retail sales of organic products in Europe](#) reached a total value of €53.1 billion in 2022. Germany stands out as the largest market with sales reaching €15.3 billion. In 2022, the organic food and beverage market in the European Union experienced a decline of 2.2%, marking a decline after years of consistent growth. This downturn was primarily driven by high inflation, which has reduced purchasing power among European consumers. However, the organic market is expected to recover and continue its growth. In Germany, for instance, the [demand for organic products began slowly growing again in 2023](#).

In line with the interest in organic products, there is a growing preference for natural, healthier, and clean label options in Europe. One syrup experiencing rising demand as a result is rice syrup. The [European rice syrup market reached approximately USD 677 million](#) in 2023, up from USD 631 million in 2022. Rice syrup's gluten-free and allergen-free qualities make it particularly attractive to health-conscious consumers in Europe. The size of the rice syrup market in Europe is projected to expand, also for organic rice syrup. Manufacturers are expected to continue to innovate to align with changing consumer preferences and regulatory standards. On a global level, the [rice syrup market is projected to register an average annual growth of 4.1%](#) between 2022 and 2027.

Tips:

Check the [CBI study on the demand for natural food additives in the European market](#) for more trade data.

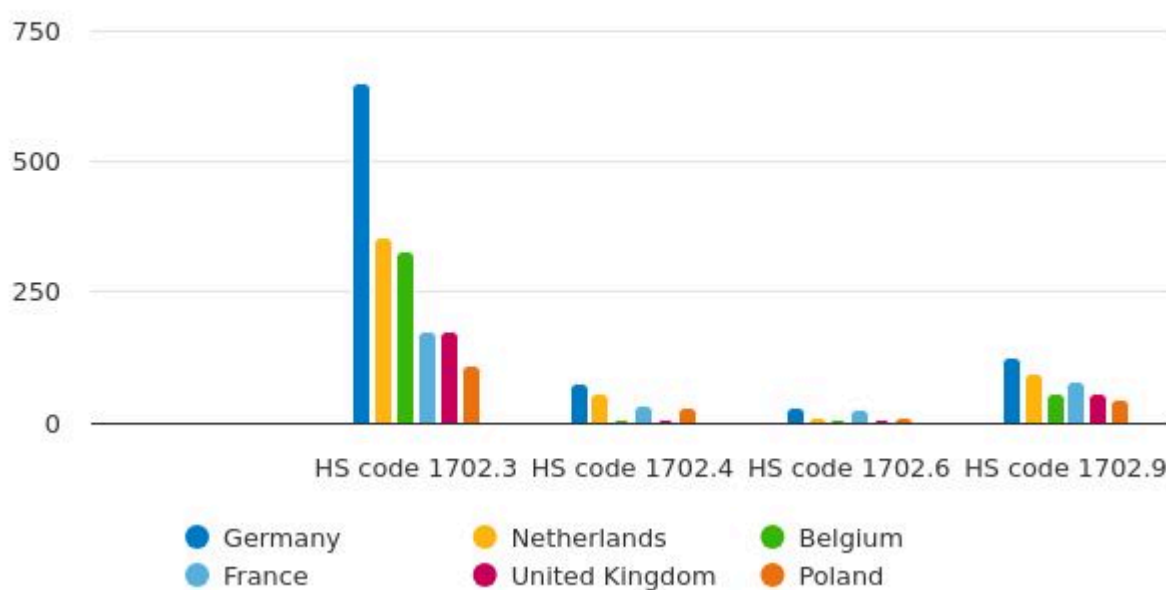
Visit online sources such as [ITC Trade Map](#) or the [EU Access2Markets](#) to do your own research with trade statistics on syrups.

Stay up to date on the developments in the European food and beverage market. Inform yourself on trends, market requirements, product launches, and other market developments. You can do so by checking online websites such as [Food Navigator](#) and [Food Ingredients First](#).

### 3. Which European countries offer the most opportunities for natural syrups?

Germany, France, the UK, the Netherlands, Belgium and Poland can be considered interesting markets for exporters of natural syrups. These countries have sizeable imports of products under the HS codes that are part of this study. In addition, they have large food and drink industries, and some of the largest organic markets in Europe. Although the largest share of imports from those countries is supplied by intra-European trade, there are opportunities for non-European exporters.

**Figure 4: Total imports of the 6 selected countries, 2023**  
in 1,000 tonnes



Source: ITC Trade Map, 2024

#### Germany

Germany has a combination of all the elements that make up an interesting market for natural syrups: it is Europe's largest consumption market, it has a large food and beverage industry, a large organic and plant-based market, large imports across the different HS codes, and the presence of large industry traders.

Germany was Europe's largest importer of syrups in the categories 1702.3, 1702.4 and 1702.9. It imported a total of 874 thousand tonnes of syrups in 2023. Between 2019 and 2023, import volumes increased at an

average annual rate of 1.3%. For all the codes combined, Germany imported about 6.5% directly from emerging markets.

The largest share of imports were for HS code 1702.3 (including rice syrup), with a total of 647 thousand tonnes at a value of €565 million. The largest suppliers of syrups under this category were Belgium (37% of total import value) and France (27%). Germany purchased only 1.9% of syrups under this code from emerging market economies in 2023, up from 0.6% in 2019. The main emerging market economy suppliers to Germany in 2023 were China (with a German import value of €5.6 million, at 1.0% of German import value), Pakistan (0.4%, with €2.0 million), and India (0.2%, with €1.2 million).

With 66%, by far the largest share of imports directly from emerging market economies goes to HS code 1702.6 (including agave syrup). Mexico is the main supplier with a value of €31.4 million in 2023, up from €19.6 million in 2019. Other suppliers were Taiwan with 0.2% of total German import value (€84 thousand), and Lebanon and China, at €55 thousand and €49 thousand respectively.

Imports for HS code 1702.4 (including date syrup) are almost exclusively imported from Europe, with 99.8% in 2023. Belgium is the main supplier (29% of total German import value), followed by Austria and Hungary (each with 20%). With regard to imports for HS code 1702.9 (such as Yacon and coconut flower syrups), German imports from emerging market economies increased at an average annual rate of 16% between 2019 and 2023. However, in 2023, it only made up 7.0% of total German imports. The main emerging market economies supplying to Germany in this category were Indonesia (German import value of €2.4 million, good for 1.3% of total imports), China (1.3%, €2.3 million), Ukraine (0.8%, €1.5 million), and Malaysia (0.8%, €1.4 million).

Apart from being a large importer of several syrups, Germany is also an important re-exporter of these products. Total German re-exports to other European countries amounted to a value of €243 million. That is about 29% of its total import value.

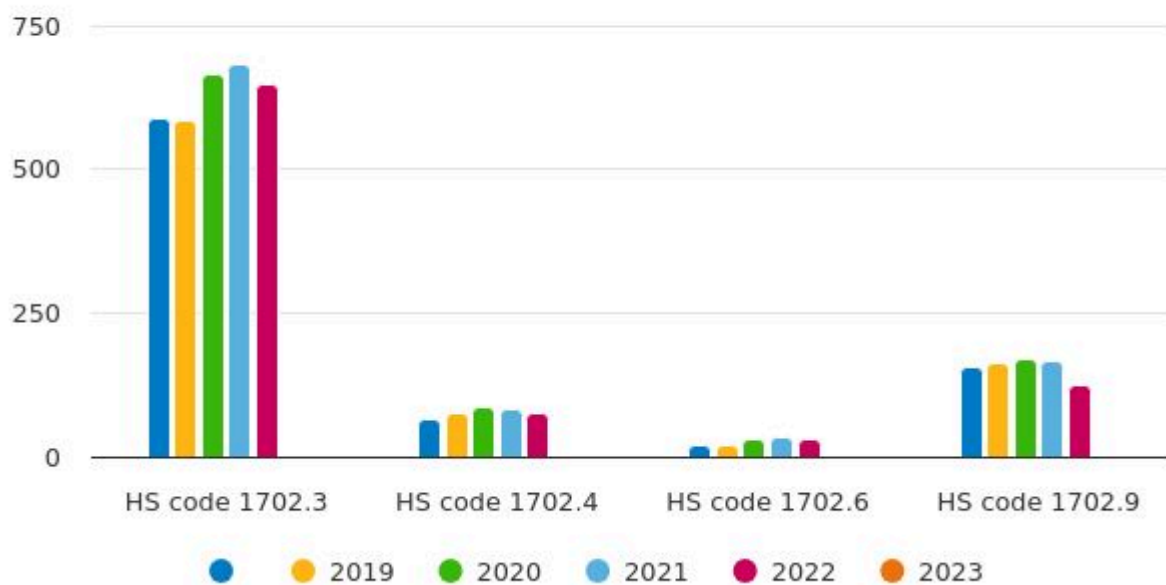
Syrups are used in Germany's large food and beverage manufacturing industry and also serve home consumer demand. Germany has a large population of 83 million people. This makes Germany the largest consumption market in Europe. In addition, Germany had the [second-largest food and beverage market in Europe](#) in terms of turnover, at €186 billion in 2021. Natural syrups are a key ingredient for many product applications.

Moreover, the organic food market in Germany is the largest in Europe. Growing food safety concerns and the pressure to adopt a clean label have created an innovative environment in the Germany food and beverage sector, aiming to incorporate natural syrups like rice syrup in product applications to meet this consumer demand. Examples of leading German organic food retailers are [BioMarkt](#) and [Alnatura](#).

Examples of German companies that import large volumes of natural syrups are [Tuchel & Sohn](#) and [naVitalo](#). Tuchel & Sohn's product range primarily consists of natural sweeteners, including viscous sweeteners such as bee honey, and various syrups like maple syrup, agave syrup, rice syrup, date syrup, and coconut syrup. Additionally, they deal in granular sweeteners such as honey powder, maple sugar/flakes, agave inulin, rice syrup powder, coconut blossom sugar, raw cane sugar, and beet sugar, all of certified organic quality. The company naVitalo sources plant-based raw materials from rice, oats, tapioca and other types of grains. They offer the European food industry several natural sweeteners, plant-based milk alternatives and vegan proteins.

**Figure 5: German syrup import volumes, separated per HS code**

in 1,000 tonnes



Source: ITC Trade Map, 2024

## France

The French market offers interesting opportunities for suppliers of natural syrups. Besides having the largest food and beverage manufacturing industry in Europe, France is also Europe's second-largest consumer market, it is [Europe's second-largest market for organic foods](#), and it is a leading importer and distributor of several natural syrups.

Natural syrups in France serve both the country's vast food and beverage manufacturing industry and the growing demand from its 65 million consumers. In 2021, [France's food and beverage sector had the largest turnover](#) in Europe, reaching €228 billion. Natural syrups are key ingredients in many of the products produced by the French industry.

In 2023, France imported a total of 311 thousand tonnes of syrups. Between 2019 and 2023, import volumes declined at an average annual rate of 4.9%. The share of French imports directly from emerging market economies, for all codes combined, was 4.5% in 2023.

The largest share of French imports fell under HS code 1702.3 (such as rice syrup), with 176 thousand tonnes valued at €179 million. The largest supplier of this type of syrup to France is Belgium (with 62% of import value), followed by Italy (15%). France purchased only 2.0% of syrups under this code from emerging market economies in 2023, up from 1.2% in 2019. The primary emerging market economy suppliers in 2023 were China (€1.5 million of French imports, 0.8% of total import value), Pakistan (€1.4 million, 0.8%), and Türkiye (€485 thousand, 0.3%).

With regard to HS code 1702.6 (including agave syrup), France imported 21% directly from emerging markets, with Mexico as the sole leading supplier. In 2023, Mexico shipped €7.2 million, up from €5.6 million in 2019. Although the share of imports from Mexico increased, total French imports increased at a faster rate, resulting in a decreasing share of direct imports from emerging market economies. France increased its imports from other EU countries significantly between 2019 and 2023, from an import value of €7.4 million in 2019 to €29.5 million in 2023. In addition to Mexico, other suppliers of HS code 1702.6 to France included Taiwan (1.4% of

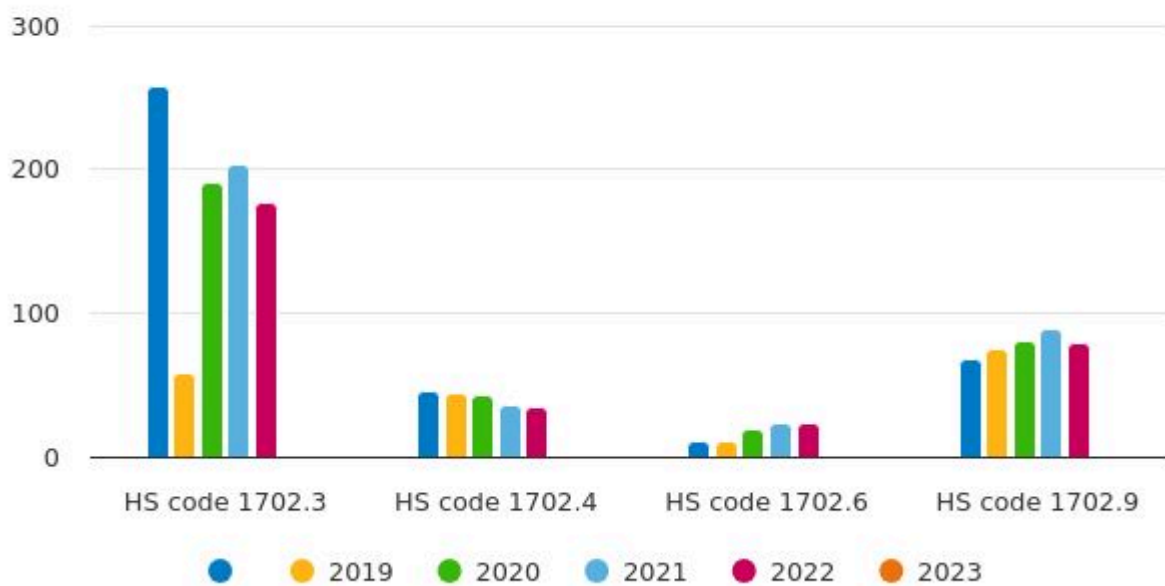
total French import value), China (0.2%), Türkiye (0.1%) and Jordan (0.1%).

Imports under HS code 1702.9 (such as Yacon and coconut flower syrups) increased between 2019 and 2023, but emerging market economies accounted for just 4.0% of total French imports in 2023, with China supplying 1.7%, and Malaysia contributing 0.4%. For HS code 1702.4 (including date syrup), nearly all imports (99.9% in 2023) came from within Europe, mainly Belgium.

Although large shares of syrups are imported from other European countries, the French market provides opportunities for exporters of natural syrups. Like in Germany, growing consumer demand for healthier, natural, and clean-label ingredients is driving innovation within the food and beverage sector. As French consumers increasingly prioritise these products, suppliers offering high-quality, sustainable natural syrups have the potential to capture a share of this expanding market.

Examples of French brands offering natural syrups to consumers include [nu<sup>3</sup>](#) which provides organic-certified agave, Yacon, and maple syrups, and [Danival](#) with organic-certified rice syrup. Examples of organic syrups offered by large French organic retailers such as [Biocoop](#), [La Vie Claire](#), and [Naturalia](#), include agave, Yacon, and maple syrups.

**Figure 6: French syrup import volumes, separated per HS code**  
in 1,000 tonnes



Source: ITC Trade Map, 2024

## UK

The UK has one of the largest consumer markets in Europe. The market for organic food and drinks is growing. Rising consumer awareness and growing demand for natural and healthier food and drink products are major reasons. The country also has a large food and beverage sector, which generated about €153 billion in turnover in 2022. The industry demands significant volumes of syrups for the manufacturing of food and drink products.

Total UK imports in 2023 amounted to 241 thousand tonnes in 2023, down from 280 thousand tonnes in 2019. About 8.0% of total UK imports were sourced directly from emerging markets, slightly higher than that of the other European countries analysed.

The UK is among the main importers of HS codes 1702.3 (such as rice syrup) and 1702.9 (e.g. coconut flower syrup) within Europe. Regarding code 1702.3, total UK imports amounted to 173 thousand tonnes in 2023, registering an average annual decline of 3.6% since 2019. The share of direct imports from emerging market economies increased steadily: from an import value of €666 thousand in 2019 to €5.9 million in 2023. Main emerging markets supplying these syrups to the UK are Türkiye, with an import value of €2.5 million (representing a 1.4% market share), followed by China at €1.6 million (0.9%) and India at €1.1 million (0.6%).

With regard to HS code 1702.9, total UK imports reached 57 thousand tonnes in 2023, at a value of €107.2 million. The imports directly from emerging markets increased at an average annual rate of 20% between 2019 and 2023. The main emerging market suppliers to the UK were China (at a value of €8.2 million, 7.6% of total import value), Türkiye (€2.2 million, 2.1%) and Indonesia (€1.2 million, 1.1%).

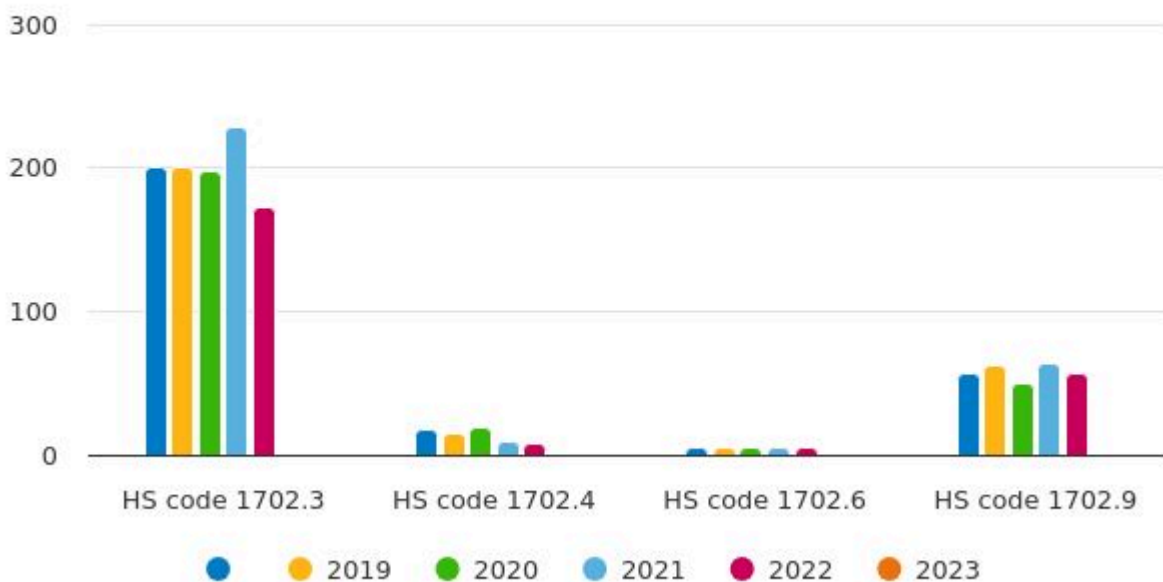
About 10% of imports under category 1702.4 were purchased directly from emerging markets. The main supplier was UAE with an import value of €350 thousand (representing a 7.1% market share), followed by Taiwan at €72 thousand (1.5%).

Approximately 40% of imports under HS code 1702.6 (including agave syrup) were directly purchased from emerging markets. The leading supplier was Mexico, with an import value of €2.8 million, accounting for 32.5% of the total import value market share. Taiwan followed with €382 thousand, representing 4.4% of the total import value.

Examples of importers in the UK are [Global Foods](#) (specifically for date syrup) and [Sarant](#). The largest organic retailer in the UK is [Planet Organic](#).

**Figure 7: UK syrup import volumes, separated per HS code**

in 1,000 tonnes



Source: ITC Trade Map, 2024

## Netherlands

Although the Netherlands is not a major consumer market, it is known to be an important entry point for raw materials into Europe. This is partly because most raw materials are re-exported to other European countries. A

share stays within the country to serve the Dutch food and beverage manufacturing industry. [The Dutch industry ranked as the fifth-largest](#) in the EU, with a turnover of €81.6 billion in 2021.

Like France and Germany, the Netherlands mainly imports syrups from other European countries. The share of direct imports from emerging market economies for the different HS codes is 3.4% for 1702.3; 0.1% for 1702.4; 25.1% for 1702.6; and 8.3% for 1702.9.

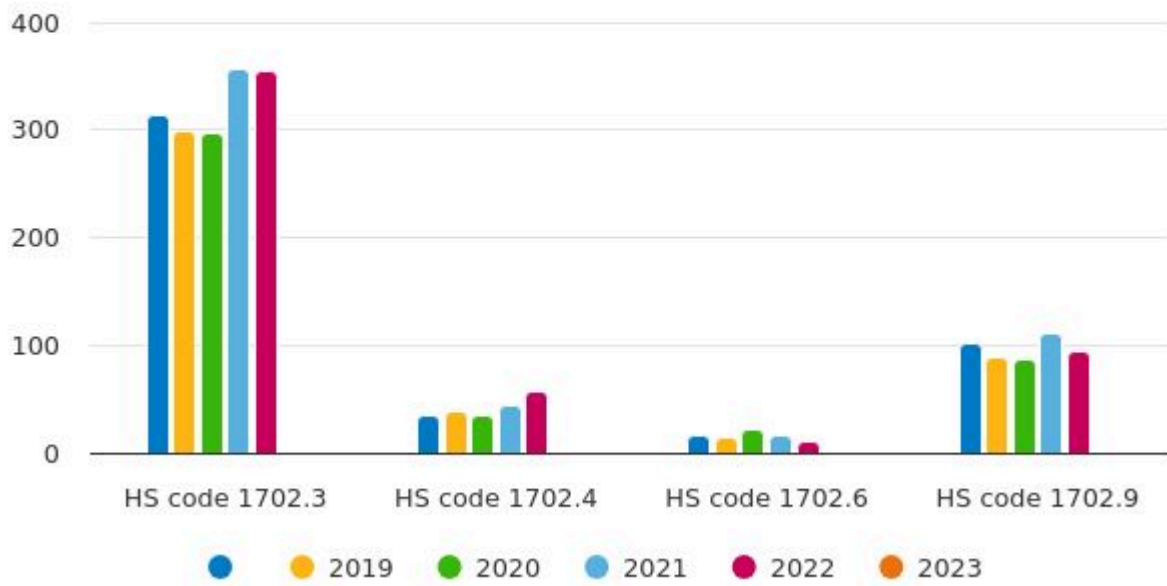
Total Dutch imports of syrups in 2023 amounted to 517 thousand tonnes. Between 2019 and 2023, import volumes increased at an average annual rate of 2.7%. With regard to the imports of agave syrup (1702.6), Dutch imports from Mexico saw a steep decline between 2019 and 2023, with imports dropping from an import value of €13.8 million in 2019 to €3.8 million in 2023.

In 2023, the primary emerging market suppliers for HS code 1702.3 (such as rice syrup) to the Netherlands were China, with an import value of €6.3 million (representing a 2.8% market share), followed by Thailand at €1.0 million (0.5%).

The main emerging market economy suppliers for HS code 1702.9 (including Yacon and coconut flower syrup) in 2023 were Indonesia (with a Dutch import value of €4.4 million, good for a 3.6% share), followed by China (€4.0 million, 3.3%), and Thailand (€713 thousand, 0.6%).

Examples of Dutch importers of natural syrups include [Maya Gold Trading](#), [DO IT ORGANIC](#), and [Tradin Organic](#). All three only handle organic-certified products. An example of a large organic retailer in the Netherlands is [Ekoplaza](#).

**Figure 8: Dutch syrup import volumes, separated per HS code**  
in 1,000 tonnes



Source: ITC Trade Map, 2024

## Belgium

Like the Netherlands, Belgium is not a major consumer market. However, it plays an important role in the imports of raw materials into Europe. This is partly because ingredients are re-exported to other European

countries, but a share also stays within the country to serve the Belgian food and beverage manufacturing industry. [The Belgian industry ranked as the sixth-largest](#) in the EU, with a turnover of €75.6 billion in 2021.

Total syrup imports by Belgium amounted to 391 thousand tonnes in 2023. Between 2019 and 2023, Belgian imports increased at an average annual rate of 13%. Most imports were supplied by neighbouring countries France and the Netherlands. The imports from emerging market economies accounted for 1.6% of 1702.3 imports, 0.1% for 1702.4 imports, 72% of 1702.6 imports, and 2.3% of 1702.9 imports.

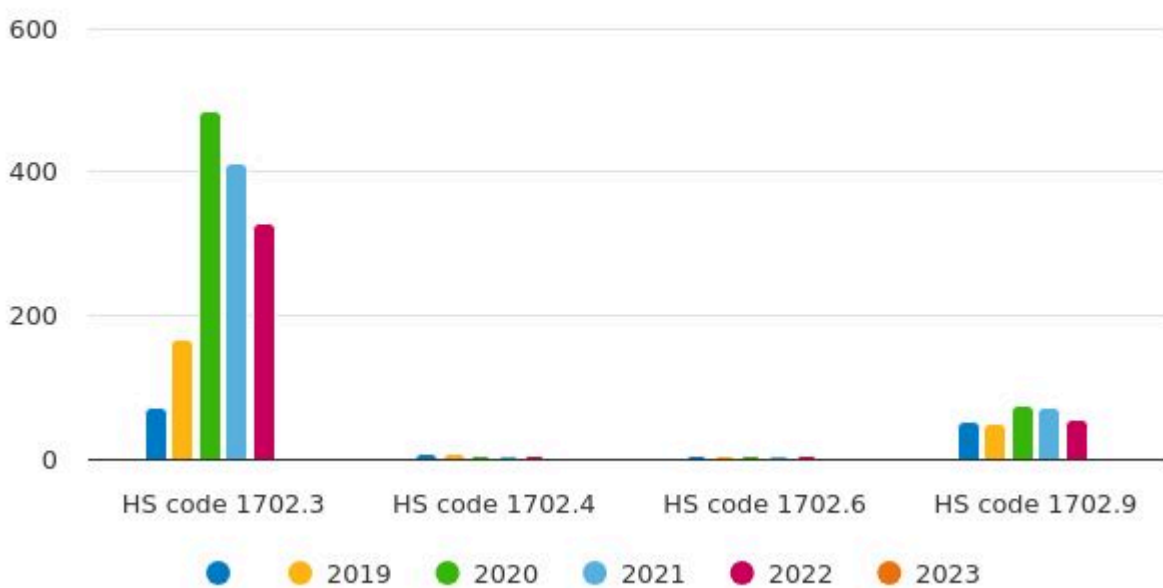
Belgium's largest import category is HS code 1702.3 (such as rice syrup), with imports growing from 171 thousand tonnes in 2019 to 328 thousand tonnes in 2023, registering an average annual growth rate of almost 18%. The main emerging market economy suppliers for this code were China (1.3% of total Belgian import value) and Türkiye (0.1%).

The largest emerging market economy supplier of syrups to Belgium was Mexico. Belgian imports from this country (for code 1702.6, which includes agave syrup) increased at an average annual rate of 20% between 2019 and 2023. In 2023, Belgium imported for €6.7 million from Mexico, up from €3.3 million in 2019. This is mainly agave syrup, which is found in many retail chains in Belgium. For example, Belgian supermarket chain [Delhaize](#) sells agave syrup under their private label. [Bio Planet](#) (from the Colruyt Group) is an example of a large organic retailer in Belgium.

An example of a Belgian importer handling natural syrups is [Meurens Natural](#). They are specialised in natural and organic products made from cereals, such as syrups made from rice, oat, tapioca, spelt and barley malt. [Ranson](#) is Belgium's largest food wholesaler, they have a close partnership with 300 suppliers who supply a large portfolio of raw materials and products from 34 countries. These materials include agave syrup and maple syrup.

**Figure 9: Belgian syrup import volumes, separated per HS code**

in 1,000 tonnes

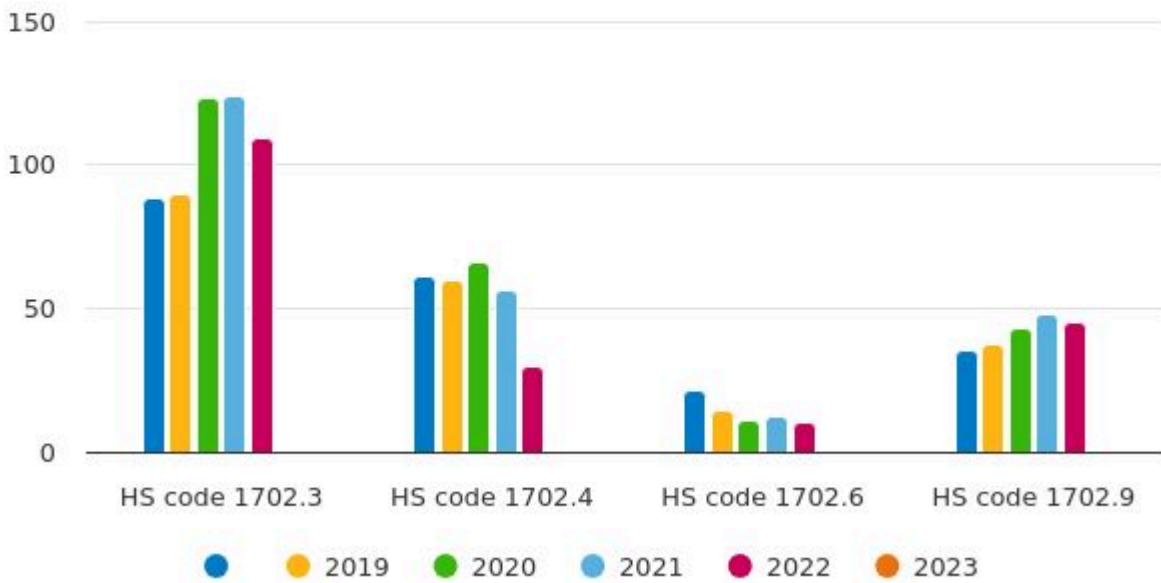


Source: ITC Trade Map, 2024

## Poland

Total syrup imports by Poland amounted to 194 thousand tonnes in 2023. Imports by Poland declined slightly at an average annual rate of 1.4% between 2019 and 2023. Like the other countries, Poland imports most of its syrups from other European countries. About 5.8% of total Polish imports were purchased directly from emerging market economies in 2023. The main emerging market supplier to Poland in 2023 was China. The import value of Chinese syrups amounted to €4.1 million for code 1702.3, and to €2.2 million for code 1702.9.

**Figure 10: Polish syrup import volumes, separated per HS code**  
in 1,000 tonnes



Source: ITC Trade Map, 2024

Germany is an important trade partner of Poland; significant volumes are re-exported to Germany. Not all syrups are re-exported, a share is also used by the Polish food and beverage manufacturing industry. Poland is a [mid-sized food and manufacturing industry in the EU](#), following right behind the Netherlands and Belgium, registering a turnover of €69.7 billion in 2021. Many of these food manufacturing companies manufacture products for other countries in Western Europe, such as Germany and Switzerland.

Examples of Polish importers of natural syrups are [Radziowi](#), [Natural Poland](#), and [Hanoju](#) (specifically for coconut flower syrup). An example of a Polish company manufacturing products with natural syrups with distribution throughout Europe is [Super Fudgio](#). They produce organic, vegan, and gluten-free confectionery products with clean labels. They avoid using palm oil and glucose-fructose syrup, prioritising alternatives like rice syrup or coconut sugar/syrup. An example of an organic retailer in Poland is [Organic 24](#).

Figure 11: A vegan confectionery product example produced with rice syrup and date paste



Source: Super Fudgio, 2024

#### Tips:

Determine which market offers the best opportunities for your company. To better understand each respective food manufacturing industry, you can find more information on the website of [Food Drink Europe](#).

Read the CBI study on [Tips for finding buyers in the European natural food additives market](#) for information on how to approach European buyers successfully.

Focus on Western European countries when exporting syrups, as they usually have large consumer markets, robust processing, and a strong food and beverage manufacturing industry.

Visit trade fairs and/or check their exhibitor lists to identify potential buyers in individual European countries. Examples include [Food Ingredients Europe](#), held annually in Frankfurt, Germany. Other major events include [Anuga](#), the world's largest food and beverage trade show, held once every two years in Germany. [SIAL](#) in France is another large food and beverage trade show, taking place in the years when Anuga is not held. Additionally, [Biofach](#), held annually in Nuremberg, Germany, is a key trade fair for organic products and ingredients.

## 4. Which trends offer opportunities or pose threats in the European natural syrups market?

The European natural syrups market is influenced by several important trends that offer both opportunities and challenges. Sustainable sourcing has become a priority for food manufacturers, increasing the demand for naturally-produced syrups. At the same time, growing health considerations lead consumers to look for healthier options, while also being wary of high-calorie and otherwise unhealthy products. Additionally, the rising demand for vegan products is boosting interest in natural syrups. The growing interest in clean label further supports this trend as consumers want more transparency about the ingredients that are included in products.

### Clean label boosts interest in natural syrups

The European market for products catering to food intolerances and allergies has seen remarkable growth. This is largely due to the sharp [increase in food allergies and sensitivities](#). Product manufacturers are placing greater emphasis on highlighting claims such as gluten-free, lactose-free, allergen-free, preservative-free, and pesticide-free on labels and packaging. Such a clean label means that the product is natural, minimally processed, preservative-free, and has a transparent and short list of ingredients.

This clean label or "free from" trend continues to grow steadily. Between 2017 and 2022, [food and beverage launches featuring "free from" claims](#) increased by a 7.1% average annual increase globally. Gluten-free remains the dominant claim, accounting for 47% of "free from" launches in the same period. Europe leads globally in this category, representing 49% of launches, followed by Asia at 19% and North America at 14%.

Many of the natural syrups are considered clean label and benefit from this trend. For instance, rice syrup is becoming increasingly popular as a preferred alternative to refined sugars due to its clean label appeal. It is gluten-free, and is versatile for a wide range of food and beverage applications. This makes it an attractive option for food manufacturers, especially those looking for clean label formulation. As consumers place greater emphasis on health and wellness in their diets, this trend is expected to grow.

Figure 12: An example of a clean label product: organic unrefined 'free from fructose' rice syrup



Source: [De Notenshop](#), 2024

## Vegan demand drives demand for natural syrups

The interest in plant-based products is behind the demand for natural syrups in the European market. With the increase in the number of flexitarian and vegan consumers in Europe, the demand for syrups from a vegetable origin has grown. Products like vegan confectionery are driving demand for natural syrups.

For instance, Nutella launched a vegan version in September 2024. In the vegan version of this chocolate spread, product manufacturer Ferrero has replaced milk powder with chickpeas and rice syrup. Milk powder typically adds smoothness, lactose enhances sweetness, and milk fat improves texture. In plant-based alternatives, [sugar and syrups can replace lactose](#), offering both sweetness and potential cost savings. Adjusting the cocoa butter content helps to maintain the desired viscosity.

In addition, as honey is derived from bees, consumers are increasingly interested in alternative sweeteners. As a result, there is a wide variety of sweeteners for sale in each European country. For instance, large retailer REWE (Germany) offers organic-certified [agave syrup](#) and [coconut flower syrup](#) to consumers, besides a wide variety of honeys.

## Growing health considerations result in both opportunities and threats

A large share of European consumers are actively reducing their sugar intake. Sugar consumption is linked to major health issues like obesity, diabetes, and heart disease. The high-calorie content of sugar, combined with overconsumption, significantly contributes to high obesity rates. As a result, [Europeans increasingly seek products with no added sugars](#). In response to that, many European companies are reducing or eliminating sugar in their products.

This shift is boosting demand for low-calorie sweeteners like stevia and monk fruit, while it poses a challenge for syrups with a high-calorie content. For instance, rice syrup has almost [twice the calories of an equivalent amount of white sugar](#). Also, [agave has more calories](#) per teaspoon than sugar (20 calories versus 16 calories). However, agave and rice syrup are typically sweeter than regular sugar, so less is needed in product creation.

In addition to calories, [the glycaemic index \(GI\)](#) of sweeteners is also a growing concern. High-glycaemic sweeteners raise blood sugar levels dramatically. Regular sugar has a GI of around 65, while agave syrup has a typical GI of 15, date syrup of 54, maple syrup of 55. On the other hand, rice syrup has a much higher level with a GI of 100.

Low-GI foods are particularly beneficial for managing blood glucose levels, especially for people with diabetes. This GI is most relevant to diabetics, one of the most common chronic conditions in Europe. In 2024, it was estimated that over 64 million people lived with diabetes in Europe. In addition, an increasing number of consumers are worried about diabetes even if they have not been diagnosed.

Another aspect that is receiving increased attention is the fructose content in sweeteners. Agave, in particular, presents a potential concern, as it can contain up to 90% fructose, compared to the 50% found in regular sugar. High fructose consumption has been linked to increased risks of diabetes and obesity.

## Sustainable sourcing is high on the agenda of food manufacturers

[Stricter EU legislation on sustainability](#) along with growing consumer concerns about climate change and poor working conditions, are pushing European buyers to set stricter sustainability requirements.

European companies have varying definitions, priorities, and ambitions concerning sustainable sourcing. This means there is no one-size-fits-all approach to these challenges. Nevertheless, many buyers are demanding greater transparency from their suppliers on sustainability matters. A growing number of companies will request that suppliers sign a supplier's code of conduct or complete forms for self-audits. This development has also

influenced the uptake of sustainability certification; especially organic certification is growing steadily.

Adhering to international standards and obtaining certification can enhance an exporter's marketing story. Potential buyers are increasingly interested in the social aspects of production. Providing transparency about how ingredients are produced and sourced builds trust among buyers and consumers alike. One of the main benefits of storytelling is its capacity to communicate a brand's sustainability initiatives, showcasing its commitment to responsible practices. An example of a company doing this is Grupo Solave. This Mexican company is a leader in agave syrup and exports, and explains [its social and environmental commitments](#) on its website.

#### Tips:

Make sure to provide clear and complete product specifications to potential European buyers. Take a look at examples of technical datasheets from companies like [DO IT ORGANIC](#) (agave syrup) and [Vehgroshop](#) (tapioca syrup). Also pay special attention to the way you present your product and company to potential European buyers, including product specifications, certificates, and packaging.

See the [CBI Trends study for natural food additives](#). Here you can find more information on European market trends and how to deal with opportunities and threats posed by them.

Keep an eye on international trade fairs specialised in vegan and flexitarian diets. These fairs may provide opportunities for understanding potential applications for your natural syrups. Examples include the [Free From Food & Ingredients](#), [Veggie World](#) and [Plant Based World Expo](#).

See if getting certified is an interesting option for your company. It could help guarantee buyers that your product meets certain standards. However, before applying for certifications, always talk to (potential) buyers about whether they are interested in certified ingredients. If you are already certified tell prospective buyers about the certification you have. Show this on your company website and marketing materials.

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

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