

The European market potential for cardamom

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Europe is a growing market for cardamom exporters. Germany, the United Kingdom, the Netherlands, Sweden, France and Finland can be considered the most promising European markets for cardamom exporters from developing countries. These countries combine high import levels, developed spices and herbs markets, and consumption of cardamom for growing ethnic markets or for traditional recipes. The European market is shaped by trends in sustainably sourced spices, and organic certification is a particularly growing niche. Interest in single origin also influences the high-end market.

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1. Product description

Cardamom (or cardamon) is a tropical plant of the ginger family *Zingiberaceae*. The spice refers to a range of plants in the *Elettaria* (small cardamom) and *Amomum* (large cardamom) genera.

Both types are imported to Europe. Small cardamom, *Elettaria cardamomum* Maton, is often referred to as the 'Queen of Spices'. Its pods are small with a light green colour. Black or large cardamom, *Amomum subulatum*, is recognised by larger pods of a dark brown colour.

Guatemala and India are the main cardamom producers worldwide. Guatemala only produces small cardamom, while India produces both types. Other producing countries are Nepal, Indonesia, Tanzania, Sri Lanka, Laos, Bhutan and Malaysia, and there are other smaller producers. Ethiopia produces Korerima (known as Ethiopian cardamom or false cardamom), whose botanical name is *Aframomum corrorima*; its seeds are black or brown.

Cardamom is one of the world's most expensive spices, surpassed only by saffron and vanilla. It is mainly used in ethnic cuisine (Indian and Middle Eastern) and health products.

This factsheet only focuses on dried, whole, and ground cardamom used as a spice in food. The data used for this study are based on the following Harmonized System codes:

- 0908.31: whole cardamoms
- 0908.32: crushed or ground cardamoms

The difference between crushed and non-crushed cardamom was only introduced into the Harmonized System (HS) in 2012 and there is no distinction between their tariffs.

The trade data presented in this factsheet combine whole and crushed/ground cardamoms, unless otherwise

specified.

Figure 1: Green cardamom pods



Source: Free-images.com

Europe has a massive and diverse food and beverage industry, providing a broad range of applications for cardamom. The spice is becoming increasingly popular due to the growth of Asian and Middle Eastern cuisines in Europe, but it is also used in traditional European recipes. European imports of cardamom have grown significantly in recent years, registering double-digit figures both in value and volume. Although whole cardamoms represent the majority of European imports, there are opportunities for crushed/ground cardamom.

Europe offers a wide industry for cardamom

The European food and drink market is one of the largest in the world. According to Food and Drink Europe, [the industry has a turnover of nearly €1.1 trillion](#). But Europe is not the main market for cardamom worldwide. In fact, it only accounts for around 10% of global imports, according to ITC Trademap data. Middle Eastern countries like Saudi Arabia and the United Arab Emirates, and South Asian countries like India, [account for more than 60% of the world's consumption](#). Still, because of its size and importance the European market does offer broad and growing applications for cardamom.

The growth in cardamom consumption is related to the increasing demand for Asian and Middle Eastern food, but also to traditional European dishes. In Scandinavia, for example, the typical dishes using cardamom are Finnish *pulla*, Swedish cardamom buns *kardemummabullar* and Norwegian Christmas bread *julekake*. In Germany, cardamom is used in the traditional spicy cake *Kuchen*. Cardamom is also increasingly used in fusion-flavoured jams, compotes and crême brûlée.

A growing European demand fuelled by imports

Europe does not produce cardamom, so it depends on imports to fuel its consumer market. In 2021, Europe imported €86 million or 5.0 thousand tonnes of cardamom, including both whole and crushed/ground. The value of imports has increased significantly since 2017, at an annual rate of +29% (Figure 2), while the imported volume increased at +13% (Figure 3). In total, 74% of imports were supplied by developing countries in 2021. The remaining imports are mainly represented by intra-European trade. A small share was registered from other origins.

Cardamom is mainly imported and consumed in whole form. In 2021, whole cardamoms accounted for around 85% of imports and crushed/ground cardamom accounted for the remaining 15%. The European food-processing industry buys large amounts of crushed cardamom. European re-exporters add value to re-exported and processed cardamom through further processing, including crushing, and packaging. Around 43% of the cardamom exported by Europe is crushed. Stocking and distributing the product in smaller quantities is another way to add value.

Processing and heating treatments, such as steam sterilisation, are mainly done by European processors. More and more, however, these processes are performed in countries of origin too. Especially heat treatment is becoming an important buyer requirement. As an exporter, you must comply with such requirements if you want to successfully export crushed/ground cardamom.

Tips:

If you want to enter the market for crushed cardamom, be aware that you are competing with European processing companies directly. Buyers may ask you to provide the same service as European re-exporters, so expect requirements on short supply times, small orders, steam sterilisation, further processing, and so on.

Explore opportunities to work together with European processing companies, especially large ones that have the size and resources required to invest. You can find these companies in the membership lists of the national spice associations in Europe. For an overview of associations, go to the [Members section of the European Spice Association \(ESA\)](#).

Read more about the European food and beverage market on the [annual publication of the sector association Food and Drink Europe](#).

Read more about the general developments in the spices and herbs market in our study '[What is the demand for spices and herbs on the European market?](#)'.

Germany, the United Kingdom, the Netherlands, Sweden, France and Finland can be considered the most promising European markets for cardamom exporters in developing countries. These countries have the largest cardamom imports in Europe, with a significant share of these imports sourced in developing countries. These are countries with a sizeable food and beverage industry, and developed spices and herbs markets. Particularly in the Nordic markets and Germany, cardamom is used in traditional recipes too.

Table 1: Imports of cardamom, whole and crushed/ground, top-6 European markets, 2017-2021

Country	tonnes	% Change Volume (2017-2021)	Per EUR 1,000	% Change Value (2017-2021)	% from developing countries, in value, 2021	Main developing country-suppliers
Germany	1,214	+16%	20,168	+32%	95%	Guatemala (80%), Tanzania (6.3%), India (5.2%)
UK	1,116	+10%	17,764	+22%	89%	Guatemala (62%), India (19%), Tanzania (6.9%)
The Netherlands	1,160	+14%	17,750	+33%	64%	Guatemala (59%), Panama (2.5%), India (2.2%)
Sweden	297	+5.8%	6,502	+26%	51%	Guatemala (43%), India (3.8%), Turkey (1.3%)

France	245	+14%	5,066	+31%	86%	Guatemala (71%), India (12%)
Finland	158	+1.5%	4,956	+27%	85%	Guatemala (80%), Turkey (4.5%), Sri Lanka (0.3%)

Source: Eurostat and ITC Trademap 2022

Germany: largest cardamom importer and European spice hub

Germany is the largest importer of cardamom in Europe, accounting for nearly 25% of total imports. In 2021, imports totalled €20 million or 1,214 tonnes. A high share of these imports is sourced in developing countries, reaching 95% in 2021. Guatemala was by the far the main supplier, at 80% of total imports in 2021, followed by Tanzania (6.3%) and India (5.2%).

The port of Hamburg is an important hub for spice trade, and an entry point into the German food and beverage industry. According to Food and Drink Europe, in 2019 Germany had the second-largest food and drink market in Europe in terms of turnover, just behind France. Large spice companies involved in grinding, packing and other processing, like [Fuchs](#), [Husarich](#), [Hamburger Gewürz-Mühle](#) and [ENES Gewürze](#), have a strong presence in the German market and often import spices directly from developing countries. There are also several relevant spice traders in the country, connecting suppliers to several end-using industries, like [Worlée](#), [Schuco](#) and [AKO The Spice Company](#). Most German spice companies can be found on the website of the [German Spice Association](#).

Cardamom finds an interesting consumer market in [Germany, which remains the largest consumer market in Europe](#), in terms of numbers of consumers and purchasing power. The country also has the highest GDP in Europe, with among the highest total purchasing power in the region. Moreover, Germany is a highly important market for sustainable and niche products. For example, the organic food market in Germany is the largest in Europe. As a result, there are several spice companies handling organic-certified cardamom active in the German market, like [Spice Bar](#), [Herbaria](#), [Hartkorn](#) and [Grünberg](#). Specialised shops offering high-quality spices, like [Gewürze der Welt](#), are also common in Germany.

United Kingdom: wide market for South Asian cuisine and herbal infusions

The United Kingdom is also among the main European markets for cardamom, accounting for over 20% of total European imports in 2021, at nearly €18 million or 1,116 tonnes. Around 89% of suppliers were sourced directly in developing countries, with Guatemala (62%), India (19%) and Tanzania (6.9%) playing an important role.

The UK has one of the largest consumer markets in Europe. According to the UK Food and Drink Federation (FDF), the country's food and beverage sector generated about €120 billion in turnover in 2020. Ethnic food plays a very important role in the sector, particularly Indian food, which represents an important demand for cardamom in preparing basmati rice and in several curries such as garam masala. Indian is [among the most common non-UK nationalities in the UK at 795,000 inhabitants in 2022](#), and it continues to expand as India is also the most common non-UK country of birth for UK citizens. But Indian food is also popular among the rest of the British population. [A 2020 survey by TasteWise](#) revealed that South Indian cuisine, both traditional and fusion-style, is rising in demand by +97% annually, driven by vegan diets. There are also thousands of Indian restaurants spread throughout different cities in the UK.

Several spice companies in the UK offer cardamom or spice mixes containing cardamom, like [Schwartz](#) (part of McCormick), [British Pepper & Spice](#) and [Quay Ingredients](#), and some focus specifically on the ethnic market, like [Natco](#). Most tea and herbal infusion companies also use cardamom in their products, like [Pukka Herbs](#) and

[Twinings](#) - which has a [cardamom-sourcing project in Guatemala](#).

Many UK importers also include cardamom in their product assortment, offering conventional cardamom, like [Rye Spice Co](#) and [The Spice Company](#), or focusing on organic cardamom, like [Organic Herb Trading](#). The UK organic market is among the largest in Europe, and its fair trade market is the largest in the region, making it a very promising market for certified cardamom. One of the main UK spice companies in this segment is [Bart Ingredients Company](#).

Netherlands: a European spice hub

Dutch cardamom imports are similar in size to those of the UK, accounting for around 21% of total European imports in 2021. Imports amounted to €18 million or 1,160 tonnes, 64% of them sourced in developing countries. But this share is probably higher, since according to ITC Trademap data, 28% of supplies come from 'areas not elsewhere specified'. These areas are likely to include developing countries too. The main developing countries supplying cardamom to the Netherlands in 2021 were Guatemala (59%), Panama (2.5%) and India (2.2%).

The Netherlands is a significant entry point of spices into Europe. This is partly due to re-exports to other European countries as well as to a strong ingredient-processing industry. The Dutch industry is expected to continue growing in the coming years.

[Silvo](#) (part of the McCormick group), [offering both cardamom and spices mixes containing cardamom such as Garam Masala](#), and [Verstegen](#) and [Euroma](#) are among the top spice companies in the Dutch market. These companies import spices directly from developing-country suppliers.

Being an important and traditional spice trader, the Netherlands is the main re-exporter of cardamom in Europe. In 2021, it accounted for 8.9% of European imports, second only to Guatemala as a cardamom supplier. Important Dutch spice traders include [Catz](#) and [Nedspice](#); smaller traders also distributing cardamom are companies like [H.J. Albring](#) and [Keyzer & Company](#). A full list of Dutch companies trading spices is available on the [website of the Dutch Spice Association](#).

The [Dutch Spice Association](#) in the Netherlands strongly supports sustainable sourcing of spices. The association is committed to Corporate Social Responsibility, and a leading group of spice importers in the Netherlands has set up the international [Sustainable Spices Initiative](#) with members from the Netherlands and other countries.

Sweden: a broad market for cardamom in traditional recipes

Compared to the big-three - Germany, the UK and the Netherlands - Sweden is a smaller importer of cardamom yet is still an important market player in Europe. In 2021, Sweden's cardamom imports amounted to €6.5 million or 297 tonnes. In value, Swedish imports represented nearly 8.0% of European imports. Around half of Sweden's imports were sourced from developing countries, with Guatemala (43%), India (3.8%) and Turkey (1.3%) as main suppliers. Around 34% of the remaining supplies were imported via the Netherlands.

Swedish demand for cardamom is shaped around its wide use as a spice in Swedish food. It is used [to scent doughs, add flavour to poaching liquids, and as a flavouring in drinks](#). Swedes are estimated [to consume 18 times more cardamom per capita than the average country](#).

[Bodén & Lindeberg](#) is among the leading ingredient importers in Sweden, offering cardamom in several presentations and for different applications. One of the leading spice companies is [Nordic Spice AB](#). There are also smaller importers of spices and herbs in Sweden, often focusing on products packaged at origin. These types of companies, like [Lazzat Foods AB](#), tend to focus on specific types of spices, such as ethnic cuisine spices. [Santa Maria](#) (part of the Paulig Group) is another major player in the Swedish and generally the Nordic spice market.

France: a leading European food market

France is also among the main European markets for cardamom, representing nearly 6.0% of total imports in 2021. French imports amounted to €5.1 million or 245 tonnes, 86% sourced in developing countries. Supplies to the French market are dominated by Guatemala (71%), followed by India (12%).

France is a leading food and drink market in Europe, home to interesting and large spice companies that source directly from origin, like [Ducros](#) and [Cepasco](#). But France is also characterised by a large number of small and medium-sized companies, which makes the role of traders significant. The French market has large mainstream importers like [SOCO herb](#) and more specialised importers like [L’Arcadie](#) and [Comptoir des Épices](#). More companies involved in cardamom and other spices are listed on the website of the [National Union of Processors of Pepper, Spices, Herbs and Vanilla](#).

Finland: an important Nordic market

Finland can also be considered an interesting European market. In 2021, imports amounted to €5.0 million or 158 tonnes. Around 85% of Finnish imports were sourced from developing countries, mainly Guatemala (80%) and Turkey (4.5%); a smaller share was also sourced from Sri Lanka (0.3%).

As in Sweden, cardamom is also used in traditional recipes in Finland, making it a popular spice. Most notable is [pullapitko, or pulla bread](#), a cardamom-spiced sweet loaf that can be found throughout the entire country.

[Meira](#) (part of the Italian Massimo Zanetti Beverage Group) is the market leader in dry spices in Finland, sourcing 80 different spice ingredients (including cardamom) from 28 different countries. [Santa Maria](#) (part of the Paulig Group) is another major player in the Finnish spice market and in other Nordic markets.

Tips:

Focus on Western European countries when exporting cardamom, as they usually have the largest consumer markets and a robust processing and manufacturing food and beverage industry. These are also the countries where the main spice/cardamom importers are located, and constitute important hubs into the European market.

Conduct additional market research for more insight into the differences between the countries mentioned above. Use free statistical databases such as [ITC Trade Map](#) or the [Access2Markets](#).

Visit trade fairs and/or check out their exhibitors’ lists to identify interesting buyers in individual European countries. Examples include [Food Ingredients and Health Ingredients Europe](#), [Anuga](#) and [SIAL](#) for food products and ingredients, and [Biofach](#) specifically for organic products and ingredients.

Consider attending the [Nordic Organic Food Fair](#) if you are targeting the Nordic market specifically. If possible, combine your trade fair trip with visits to existing and potential clients in the region.

See the [CBI study ‘Tips for finding buyers on the European spices and herbs market’](#) for valuable information on how to approach European buyers successfully.

Read the [Open Trade Gate Sweden on the Swedish spices and herbs market](#) and the [Finnpartnership study on the Finnish spices and herbs market](#) to gain more detailed insights into these Nordic markets.

The growth of the cardamom market is driven by an expanding interest in exotic flavours and cuisines. As the European population becomes increasingly multicultural, food and beverages containing cardamom are becoming more available to consumers. The demand for sustainably sourced spices also shapes the market for cardamom, where organic certification grows at an especially fast pace. In niche higher-quality markets in Europe, the trend for single-origin spices gives you an opportunity to tell your story as a cardamom exporter.

Growing interest in exotic flavours and cuisines

European demand for South Asian and Middle Eastern food is rising; many recipes use cardamom as an ingredient. This development drives up the demand for cardamom. The increasing demand for Asian food is due to two main reasons:

- The multicultural population in Europe is growing. In 2014, 20% of immigrants to Europe were of Asian descent, while [by 2020 this share had increased to 23%](#). In this context, Asia includes the Middle East.
- Europeans are increasingly interested in exotic cuisines, a trend that accelerated during the COVID-19 pandemic. With limited travelling, consumers' desire for exotic flavours only grew, and [cardamom has been identified as one of the searched ingredients for the 'exotic effect' in cooking](#).

Examples of accessible Asian foods and beverages that are popular in Europe and contain cardamom are easy to find. For infusions, Ayurvedic tea blends like those offered by Yogi Tea are highly popular in Europe. Several of Yogi Tea's blends have cardamom as a key ingredient, including the [Classic blend](#). Indian Chai/Masala Chai blends are also highly popular, and there are many popular brands available to consumers, ranging from mid-range to high-end products like [Amala Chai](#) and [Pukka's Original Chai](#).

Curries containing cardamom are also highly popular in Europe. Large retailers sell curry paste (like [Geo Organics Curry paste Indian Madras at Ekoplaza](#) in the Netherlands and [several curry products at Kaufland](#) in Germany), ready-to-eat curry dishes (like [Waitrose's Fruity Chicken Curry](#) in the UK), and other curry ingredients using cardamom.

Cardamom is likewise an ingredient of choice in new product launches, [including beverage flavours](#), thanks to its earthy character. Some examples are [Niet Co's Cardamom Syrup](#) (Belgium), [G'Vine](#) (France) and [Sacred Cardamom Gin](#) (UK).

Tip:

Make sure to provide complete documentation and specifications of your cardamom to European buyers. This information will allow them to assess the potential of your product in different applications. See the example of a [product specification sheet from the UK-based importer Organic Herb Trading company](#) to identify the type of data that can be useful to your potential buyers. Besides lab analysis parameters, note the importance of botanical identification and description of detailed organoleptic characteristics of cardamom.

Single origin provides opportunities for suppliers to differentiate

The market for spices follows the trend for single-origin products already observed in products like coffee and cocoa. As customers seek premium and higher-quality products, they are also increasingly interested in their origins. Consumers have also become more interested in the agro-climatic features of production areas and the stories of producers and their communities. In the case of spices, particularly cardamom, single origin also highlights unique potent and singular flavours that can only be grown in a specific region.

For importers and spice companies, single origin also means [increasing traceability, translated into consistent quality and product safety](#). This is specifically relevant for organic spices, where identity preservation and cross-contamination prevention are crucial.

With cardamom, the single-origin trend provides opportunities for less traditional origins to tell their story, like the Dutch [Bold Spices cardamom from the lush hills of Antioquia in Colombia](#) and the Danish [Mill and Mortar organic and fair trade-certified cardamom from forest garden harvests in Sri Lanka](#). Suppliers from traditional producing countries like Guatemala and India can also find opportunities by offering products from specific regions, communities and profiles, like the Swiss [Soul Spice organic cardamom from Kerala in India](#) and the UK's [Rooted Spices cardamom from Alta Vera Paz in Guatemala](#).

Figure 4: Single-origin cardamom from Rooted Spices (UK)



Source: Rooted Spices

Tip:

Explore the possibility of adding value to your cardamom by highlighting the characteristics that are unique to your company and to the producing regions you are sourcing from. This will make your cardamom more attractive, especially to buyers of higher-end spices who are interested in high quality and unique profiles. See for example the website of Colombian company [Bioandes](#), which clearly highlights the environmentally and socially responsible aspects in its story, design and product offer, including cardamom. The company also has an [Instagram account](#), where it reinforces its story-telling. Activate the 'Translate' function of your browser if you cannot read Spanish.

Growing European demand for sustainable spices

Sustainable sourcing is a growing trend in Europe. As a supplier, you will be increasingly faced with sustainability requirements from your buyer. Organic certification is growing significantly for spices, particularly for high-value spices like cardamom. Growth is driven not only by consumer demand, but also by European buyers that are requiring more traceability and cross-contamination prevention in their supply chains.

The [global organic spice market was worth €17 billion in 2021](#) and is estimated to reach a retail sales value of almost €20 billion by 2026. This means an annual growth rate of 7.5% between 2021 and 2026. North America and Europe are the largest markets for organic spices. Within Europe, the growth rate of organic spices consumption is forecast to be particularly high in Sweden and the UK (more than 5.5% per year over the next seven years). These are among the main European markets for cardamom.

The [Guatemalan Federation of Cooperatives of the Verapaces \(FEDECOVERA\)](#) is the main producer and exporter of organic cardamom in the world, besides being involved with other products like coffee and cocoa. [FEDECORA complies with the organic certification of several countries/regions worldwide](#), allowing it to diversify its markets, including EU organic certification, USDA Organic, JAS and BioSuisse. The federation also provides support to its producers in the form of technical assistance to assure compliance with organic practices and nature preservation.

The growth in organic spices reflects the overall growth in organic sales for food and beverages in Europe. Overall retail sales in Europe reached about [€52 billion in 2020](#), making it the world's second-largest region when it comes to organic retail sales (after North America). The largest national markets for organic foods are Germany (29% of the European market in 2020 with organic retail sales of over €15 billion), France (at nearly €13 billion) and Italy (at €3.9 billion).

Tips:

Read FiBL/IFOAM's [latest version of the publication World of Organic Agriculture \(2022\)](#) to find out more about the global and European organic sector.

Explore the [database of Organic-Bio](#) to identify potential importers of organic cardamom, as well as competing suppliers from other producing countries.

Look for possible partners to improve sustainability in your supply chain. You can use available programmes and subsidies from governmental or non-governmental organisations for investments in sustainability. For more information, visit websites like the [Sustainable Spice Initiative](#), the [Netherlands Enterprise Agency](#) and the [German Ministry for Economic Cooperation and Development](#).

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

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