

Which trends offer opportunities or pose threats on the European spices and herbs market?

Last updated:
25 April 2023

The increasing demand for sustainably produced spices, new origins, the growing interest in the health benefits of spices and their use in international cuisines are the top trends opening up opportunities for exporters from developing countries. Against this, mounting buyer requirements and legislation changes can represent threats to suppliers from developing countries – particularly new suppliers that are not yet familiar with these requirements. Spices are increasingly being tested for allergens, toxic substances and authenticity, so it is crucial to keep up with these market dynamics to remain a competitive supplier to the European market.

Contents of this page

1. [Awareness of allergens and toxic substances leads to stricter controls](#)
2. [Heat Treatment is becoming a must for European buyers](#)
3. [Authenticity of spices regains attention in Europe](#)
4. [Sustainable sourcing is not a trend, but a requirement](#)
5. [More transparency throughout the supply chain](#)
6. [Increasing demand for organic and natural spices in Europe](#)
7. [Demand for new flavours fuel the market for ethnic foods in Europe](#)
8. [Growth in spices with health benefits beyond COVID-19](#)
9. [Innovations in \(consumer\) packaging and sustainable materials](#)
10. [The growing importance of origin and origin protection in Europe](#)
11. [New origins in Asia and Africa are coming up!](#)

1. Awareness of allergens and toxic substances leads to stricter controls

According to the European legislation on the [provision of food information to consumers](#), allergens must be clearly listed in the ingredient list of foods. Although officially listed allergens in the spices and herbs category are only celery and mustard, European food inspectors found traces of many other allergens in spices due to cross-contamination. In spice-producing countries allergens such as sesame, mustard or peanuts are often grown in the same fields next to spices, which can result in cross-contamination.

Cross-contamination with allergens can happen at many places in the supply chain and European inspections frequently test food, including spices, for the presence of allergens. It can, for example, happen during shipment when spices are transported in the same containers with allergens. Allergen contamination could also happen in Europe if the same equipment is used for processing (such as grinding, mixing, packing) non-allergen spices and allergen ingredients (such as peanuts or cereals).

To secure clients, European importers have started to implement stricter control on the presence of allergens in

spices. As there is no European standard for allergen control, some European traders have implemented the Australian [VITAL](#) certification (Voluntary Incidental Trace Allergen Labelling). Being able to deliver spices and herbs that are free of allergens has become a major competitive advantage. For example, the company [Dutch Spices](#) uses their allergen-free offer of spices and herbs as a Unique Selling Point (Figure 1).

Figure 1: Logo of the company Dutch Spices



Source: Dutch Spices

Another concern is related to plant toxins found in several spices such as oregano, cumin and anise. Pyrrolizidine alkaloids (PA) are plant toxins that can be naturally present in weeds. They can contaminate seeds and spices in the field. These toxins were not a big reason for concern before 2020, but in 2020, 2021 and 2022 the European [Rapid Information System for Food and Feed](#) (RASFF) recorded nearly 30 notifications of high levels of PA, which raised awareness of the issue. High PA levels were found mainly in cumin and oregano.

Since December 2020, on the basis of Regulation ([EU](#)) 2020/2040, maximum levels for PA in cumin seeds and several herbs have been set at 400 µg/kg, while maximum levels in oregano and marjoram are set at 1000 µg/kg. This is a challenge for many European traders, as early tests showed that it was very difficult to find cumin seeds and oregano on the market that met the proposed maximum PA levels. Producing PA-free spices and herbs will become an important competitive advantage for suppliers.

Another issue related to naturally occurring substances in some spices such as cinnamon is coumarin. [Coumarin](#) is a moderately toxic, fragrant organic chemical compound naturally found in cinnamon, especially cassia (*Cinnamom aromaticum* or *Cinnamom cassia*). In response to health concerns, the amount of coumarin in foodstuffs is limited by European legislation in finished products ([European Regulation \(EC\) No 1334/2008](#)). Cinnamon containing very high levels of coumarin can be rejected at the EU border or by importers.

Tips:

Follow the [Allergen Risk Assessment Model for Dried Herbs and Spices](#) published by the European Spices Association to ensure that your spices and herbs are allergen-free. To assess the risk of cross-contamination, use the [Risk Assessment Model Calculator](#).

Implement integrated crop management to prevent PA contamination, such as a safe planting distance from potential risk areas and the physical removal of weeds while they are in the early development stage.

2. Heat Treatment is becoming a must for European buyers

European importers of spices and herbs are increasingly searching for suppliers who can deliver heat-treated spices and herbs. According to the European Commission: Alert and Cooperation Network report published in 2021, pathogenic microorganisms (mostly Salmonella) were found 145 times in imported spice and herbs at customs. The risk of contamination with pathogenic microorganisms can be reduced by heat treatment, irradiation, preservatives and fumigation.

European importers prefer heat treatment (usually steam sterilisation) over any other type of sterilisation. Other options to reduce this risk are limited and are often illegal in Europe. For example, ethylene oxide is still used to control pathogenic microorganisms in seeds and spices in many non-European countries, but it is banned in

Europe. Between 2020 and 2022, there were more than 70 notifications of unauthorised use of ethylene oxide in spices and herbs. This has resulted in [recalls of many consumer products](#) in Europe.

Irradiation of spices and herbs, for example by ionising radiation, is an efficient way to sterilise spices and herbs, but it is not favoured by European buyers and consumers. If spices or herbs are treated by irradiation, [they must be labelled to inform European consumers of such treatment](#). Most Europeans consider radiation to be harmful and do not trust irradiated products. Therefore, importers very rarely accept spices and herbs treated by irradiation.

The use of preservatives is also banned for spices and herbs in Europe. The only allowed preservative is sulphur dioxide, but it can only be used in cinnamon of the species *Cinnamomum zeylanicum* (Ceylon cinnamon) [at a maximum residue level of 150 mg/kg](#). Its use in other spices and herbs is forbidden. Even in cinnamon, the use of sulphur dioxide is problematic, because if it is used in concentrations over 10mg/kg it must be declared as an allergen. As already described in the previous chapter, allergen-free spices are an important trend.

In this context, heat sterilisation is becoming the only acceptable option for many European buyers, as it is natural and free of chemicals and radiation. An important downside of heat/steam sterilisation is that it negatively affects volatile oil content, colour and properties of some spices. It therefore depends strongly on your buyer whether they require steam sterilisation and are willing to pay for it.

Tips:

Always discuss with your potential buyers whether they require heat sterilisation. If so, invest in heat sterilisation, such as with saturated steam at 121°C, to guarantee food safety concerning pathogen microorganisms. As heat treatment equipment is a capital investment, you can use the services of a third party in Europe to do the important heat treatment according to your customer's requirements.

Search for the heat sterilisation solutions by contacting some of the well-established equipment producers present in Europe. Those include examples such as [Bühler Group](#), [Tema Process](#), [Ventilex](#), [De Lama](#) or [JBT](#).

Search the database of [ANUGA FOOD TEC](#) exhibitors to find the best equipment for your processes. You can select 'Food Safety, Laboratory technology, analytics and biotechnology' in the menu, then 'cleaning and hygiene equipment, and finally 'Sterilizing equipment'. More specifically, under trends you can select 'spices'. You can also consider decreasing your production costs through investing into used but good equipment. Check online [Industrial Auctions](#) or [Troostwijk Auctions](#) to find the equipment that best suits your needs.

3. Authenticity of spices regains attention in Europe

Protecting consumers from misleading and potentially unsafe products [has been a high priority on the European agenda for many years](#). As the spices and herbs sector [is one of the most vulnerable to fraudulent practices](#), combating adulteration and fraud in this sector is of the utmost importance to the European industry and authorities.

As a reaction to growing authenticity and purity issues in the sector, many laboratories throughout Europe, like [Eurofins Genomics](#), have increased testing to reveal fraud in spices and herbs. Common methods include DNA analysis, isotopic techniques, mass spectrometry, spectroscopy, chemometrics, and a combination of detection methods.

In late 2021, the European Commission [published an EU-wide survey](#) bringing attention to the vulnerabilities of

the sector in relation to product authenticity and purity. Given the importance of the subject, it was the first time that national food control authorities and the Commission joined forces to focus on this sector. The survey focused specifically on cumin (*Cuminum cyminum*), curcuma (*Curcuma longa*), oregano (*Origanum vulgare*), paprika/chilli (*Capsicum annuum*), pepper (*Piper nigrum*) and saffron (*Crocus sativus*). Nearly 10,000 analyses were performed on 1,885 samples.

The results revealed that the percentage of samples deemed at risk of adulteration varied per product. Oregano was identified as the most vulnerable, with 48% of samples at risk of contamination. For the other products, the following percentages were identified: 17% for pepper, 14% for cumin, 11% for curcuma, 11% for saffron and 6% for paprika/chilli. The types of adulteration detected were diverse and in line with known issues, such as colour enhancement with non-authorized dyes and substitution of spices and herbs with other botanical materials or fillers.

The European Commission calls for operators to take immediate measures to remedy a situation that is detrimental to consumers' interests and health, as well as to the spices and herbs sector itself and its stakeholders.

Tips:

Refer to existing guidelines and other publications that can help you address the blind spots in your supply chain. For example, the [Guidance on Authenticity of Herbs and Spices](#), published in a collaboration between BRCGS, the UK Food and Drink Federation and the Seasoning and Spice Association, brings a collection of good practices to target adulteration issues. The guide describes diagnostic, preventive, detection and verification measures that suppliers can implement at different steps of the chain.

Review digital technologies that can also offer you solutions for authenticity issues. Read our study [on digitalisation in spices and herbs](#) to learn more about blockchain-powered traceability platforms that can help you map out all steps and actors in the chain, creating transparency and ensuring trust.

Learn more about the [EU survey about spice and herb authenticity](#) on the European Commission page. You will find a summary of the main conclusions as well as the full report.

Create trust-based and transparent relationships with buyers. This includes clear and fast communication, fulfilment of promises and effective response to non-compliance. Sending representative samples that match the product variety and quality that you can supply is also extremely important to prove that you are a reliable supplier. The [CBI study on doing business in the European spices and herbs market](#) offers additional tips that can help you build long-term relationships with buyers.

4. Sustainable sourcing is not a trend, but a requirement

Strict [sustainability requirements](#) by European buyers were not widely present in spices and herbs until recently. However, this seems to be changing as certain spices produced less sustainably pose threats to the global supply chain and its stakeholders. Many of the spices and herbs imported into Europe are produced by underpaid farmers, who resort to using more chemicals to obtain better yields or simply switch to more profitable crops, which in turn lead to shortages of high-quality and safe spices and herbs on the global market.

Sustainability covers a wide range of social, environmental and economic aspects throughout the supply chain. However, in the spices and herbs sector specifically, the most important focus is on farmers, who are the first and most important link in the supply chain. Farmers in spice-producing countries often lack advanced

production technology, up-to-date market information, equipment, and storing and drying facilities. Under these circumstances, they lack negotiating power and must sell their spices and herbs to local traders quickly, often at low prices.

The black pepper situation in 2019 and 2020 is illustrative of the low incomes and resulting sustainability problems in the industry. In stark contrast with the fairly positive 2015-2017 period, black pepper prices dropped in 2019 and 2020 to their lowest level in 10 years. Many farmers in Vietnam did not even harvest their peppers, as harvest costs were higher than the sales profits. In some provinces, farmers who could not pay loan interests were forced to sell their land and pepper plantations. Following the COVID-19 pandemic in 2020 and 2021, black pepper prices once again increased.

While European spice import is increasing, there is also a global scarcity of sustainably produced spices fully complying with all aspects of European legislation. This means that high-quality and sustainably produced spices and herbs can provide opportunities for suppliers in developing countries. One way to add value to your spices and herbs is to provide evidence to European buyers that they are produced in a sustainable way. This evidence is ideally integrated into a holistic sustainability policy or strategy, with elements like certification, laboratory results for quality and authenticity, premium price paid to farmers, fair wages for workers in processing facilities, preservation of forest areas, and investments in rural communities.

European industry initiatives

Many international organisations and private companies are currently engaged in drumming up support for sustainable spice production. The most widely known of these is the [Sustainable Spice Initiative \(SSI\)](#) formed by a group of companies and organisations in 2012. Current SSI projects focus mostly on Asian producers, but there are indications of future projects for African countries too. Sustainability is also an important topic on the agenda of the [European Spice Association \(PDF\)](#).

Most sustainability support projects that can be observed around the world target increasing agricultural competence of farmers, like introduction of agricultural techniques, controlled use of pesticides and cross-contamination prevention. The focus is to gradually move from farmers to processors; audits such as [SMETA](#) or [amfori BSCI](#) are more frequently required. Some individual aspects are also getting attention, such as monitoring CO2 emissions. Certification schemes for CO2 emissions include [MyClimate](#) and [TÜV SÜD's carbon footprint verification](#).

Aside from international organisations, some individual companies have their own sustainability projects. Spice and herbs traders more and more recognise financial benefits such as costs reduction, shorter supply chains and easier compliance with European regulations. For example, Olam launched the [AtSource](#) sustainability project, through which some sustainably sourced materials have a premium price. This project provides customers with insights into varying sustainability parameters across the supply chain.

Spice companies and processing companies (e.g. flavour and fragrance companies and food processors) also collaborate in alliances with organisations in producing countries, as well as public institutions and NGOs in common sustainability initiatives and objectives. For example, the [Livelihoods Funds for Family Farming \(L3F\)](#) invests in large-scale projects that enable farmers to produce greater and sustainable yields of higher quality, adopt regenerative agricultural practices, and strengthen connections between family farmers, farmers' groups and business supply chains. In its [vanilla project in Madagascar](#), L3F has the companies Danone, Mars, Firmenich and Prova as project partners.

European regulation

Developments in European regulations are also contributing to more sustainable value chains and stricter controls on the activity of companies. These developments address social, ecological and economic/governance aspects of sustainability. The main developments are: the European Green Deal, the Unfair Trading Practices Directive and the European Due Diligence Act.

European Green Deal

Due to the risk of global nature loss in a short period of time, sustainability in recent years has in effect become one of the most important topics in the world, which is reflected in new legislation. It seems that the good intentions of many people and organisations to save the planet were not enough to bring the expected change. To speed up the change, the European Union set official policies to become the world's first climate-neutral continent by 2050. Those policies are called the [European Green Deal](#) and include the [Farm to Fork Strategy](#) and the [Biodiversity Strategy](#), both influencing food production and trade.

Since environment, climate, biodiversity and social responsibility are global issues, Europe cannot achieve sustainability standards alone. The European Union (EU) will support developing countries in their transition to sustainable food systems. One of the actions will be the addition of a sustainability chapter, including on food, in all the EU's bilateral trade agreements. It is expected that the EU will provide stronger support for smallholder farmers and small-scale food producers to introduce sustainable agricultural and manufacturing practices.

The main goal of the Farm to Fork Strategy is to ensure sustainable food production and distribution across the whole supply chain. As the food supply chain includes the import of food, the proposed measures will influence farmers, processors and exporters from developing countries too. The proposed actions of the European Green Deal include reducing the use of pesticides and fertilisers, increasing organic farming, reformulating processed food, changing food packaging materials and introducing new food labelling rules.

Unfair Trading Practices Directive

The European Union has been progressing toward fairer sourcing of food products as well. On 12 April 2019, the European Parliament formally adopted the [Unfair Trading Practices Directive \(PDF\)](#). Crucially for suppliers from developing countries, the new Directive protects those who are based outside the EU, but sell to an EU-based buyer. The new Directive now needs to be transposed into the law of each EU Member State within the next two years. In practice, each Member State has to investigate suspected unfair trading practices and impose penalties accordingly.

Farmers in developing countries are especially vulnerable to unfair trading practices, since they are less likely to have links with alternative markets and may have less access to legal support or the information needed to challenge the unfair practices of large European buyers.

The most common unfair trading practice is the official policy of some retailers to have very delayed payment. According to the [European Late Payment Directive](#), enterprises have to pay their invoices within 60 days, unless they expressly agree otherwise and provided it is not grossly unfair.

European Due Diligence Act

Responsible and sustainable business and fair treatment of all people in the supply chain are becoming very important topics. To encourage companies to take action to protect human rights and reduce environmental impacts in their supply chains, the European Union (EU) announced [mandatory legislation on due diligence](#) in March 2021 ([European Due Diligence Act](#)). This legislation ensures respect for human rights and the environment throughout the entire supply chain. Companies must follow the new due diligence rules. This means taking measures to prevent harm to human rights, the environment and good governance.

Good practices from producing countries

In spice-producing countries, one of the many good examples of a sustainable approach is that of [Cassia Co-op](#), a cinnamon/cassia cooperative from Indonesia. The cooperative has managed to remove middlemen from the supply chain of cinnamon products and patchouli oil. As a result, farmers were able to gain additional profit and connect with end users in Europe in a transparent way. Also, the cooperative is producing spices in an environmentally-friendly way, which has been confirmed through the Rainforest

Alliance and organic certification. The idea of Cassia Co-op is to set a good practice sustainability example for other sector stakeholders.

In another example from Indonesia, the company [Tripper](#) has a strong focus on adding value at origin, offering several organic-certified spices (cinnamon, vanilla, cloves, ginger, turmeric, nutmeg and mace) in various presentations: whole, ground, (tea bag) cut and extract. In addition to the EU certification, Tripper holds Fair for Life, USDA Organic, JAS, FSSC 22000, Kosher and Halal certifications. The company also has projects related to water conservation, soil regeneration, preservation of biodiversity, energy management, fair compensation, social development, transparency and health.

Another interesting example is the Sri Lanka-based [Small Organic Farmers' Association \(SOFA\)](#), which practices a mixed cropping system with cash crops, shade trees, repellent crops and medicinal herbs to maintain the local biodiversity and support local farmers. Also from Sri Lanka, [EKOLAND](#) sources its spices directly from sustainably managed Kandyan Forest Gardens, promoting forest conservation as well as carbon emission reduction, fair pricing, and employment creation for local communities.

The [Guatemalan Federation of Cooperatives of the Verapaces \(FEDECOVERA\)](#) is a good example from Latin America. FEDECORA is the main organic cardamom supplier worldwide and complies with the organic certification of several countries/regions across the globe, allowing it to diversify its markets. This includes EU organic certification, USDA Organic, JAS and BioSuisse. The federation also provides support to its producers in the form of technical assistance to ensure compliance with organic practices and nature preservation.

Tips:

Consider investing in some of the widely recognised certification schemes, such as [Fairtrade](#), [Organic certification](#) or [Rainforest Alliance Sustainable Agricultural Standard](#). Before making a final decision, find out if investing in certification schemes is profitable and a value addition for your company. Base your decision on long-term market demand, and speak openly with your potential and existing buyers about your certification possibilities.

Follow the principles of the [Sustainable Agricultural Network \(SAN\)](#) on matters such as environmental integrity, social well-being and economic resilience.

Read more about the SAN-Nestlé Spices Responsible Sourcing Partnership programme for [chilli](#), [coriander](#), [cumin](#) and [turmeric](#).

Inform and prepare yourself about the European Green Deal by reading the new CBI study [The EU Green Deal - How will it impact my business?](#) and the CBI article on [The European Due Diligence Act](#).

Read the [Unfair Trading Practices Directive: a transposition and implementation guide](#) to better understand how European regulation protects your rights as a supplier to Europe.

5. More transparency throughout the supply chain

European consumers are looking for more transparency in the food and drink products they consume. Part of this trend relates to ingredients like spices and herbs. Consumers want ingredients to be instantly recognisable and understandable, and know exactly where they come from. As a result, the entire supply chain is opening up more to transparency. Quality assurance and food safety departments at buyers and retailers demand this information. A decade ago, importers and agents were secretive about their suppliers. Now, presenting suppliers to final buyers in Europe is one way to be more competitive, as customers want to be fully informed.

At present, importers make presentations about their suppliers, including videos, to introduce and advertise them to the final buyers.

Storytelling is important when presenting products to European buyers as well as to final consumers. In fact, [storytelling is currently highlighted as one of the top marketing trends](#), also applicable to food products like spices. Storytelling is used to create a unique selling proposition and includes aspects such as sustainability, uniqueness and health benefits. Many companies have started to use QR codes to offer final producers more information about products. This option is used by [SpiceUp](#) project in Indonesia where final buyers can get more information about farmers and the whole supply chain.

As the use of QR codes can be too complicated and a big investment for small producers, some producers use simpler options. An example is the Cambodian company Farmlink, which sells artisanal Kampot pepper with a protected designation of origin. Final consumers can find an alphanumeric code on the vacuum sealed bag and enter this code in the 'Find my Farmer' field on the website of Farmlink.

Storytelling can also attract the attention of final buyers through ethical business approach. An interesting example is the Indian company Vaishali Industries. This company is owner of the brand [Holy Lama](#), which offers spice drops (spice essential oils for cooking and cosmetics). Vaishali Industries is an all-women enterprise that supports employment for disadvantaged women. Products are packed in India and can be found not only in India, but in European shops too.

Tip:

Create your unique selling proposition based on aspects of sustainability, quality and uniqueness. An interesting example of promotion is [Ceylon Cinnamon from Sri Lanka](#).

6. Increasing demand for organic and natural spices in Europe

European consumers are generally looking for more natural and healthier products, including spices. Organic is just one aspect of it, but new processing technologies enable production of spices and flavourings in more natural ways. Previously, oleoresins were produced as food additives which had to be marked with [E numbers](#). [Perception of E numbers \(PDF\)](#) in Europe is negative for most consumers, who believe they have negative health effects.

Availability of organic spices is still limited, although spices are used in many finished organic products. Thus, the organic market for spices is expected to grow. At the moment, European legislation allows the use of a small amount of conventional spices in organic products, provided that a specific spice or ingredient is not available as organic-certified.

Currently, India, China and Vietnam are the key exporters of organic spices. In some countries, it is not easy to produce spices and herbs free from contaminants. For example, irrigation with contaminated water from the Nile river is a big challenge for growers in its basin. Another problem is that organic spices are often of lower quality than conventional spices. In organic production it is also more difficult to control allergen cross-contamination, since weed seeds cannot be controlled with the use of herbicides. On the other hand, organic production enhances traceability and prevents cross-contamination from pesticide residues.

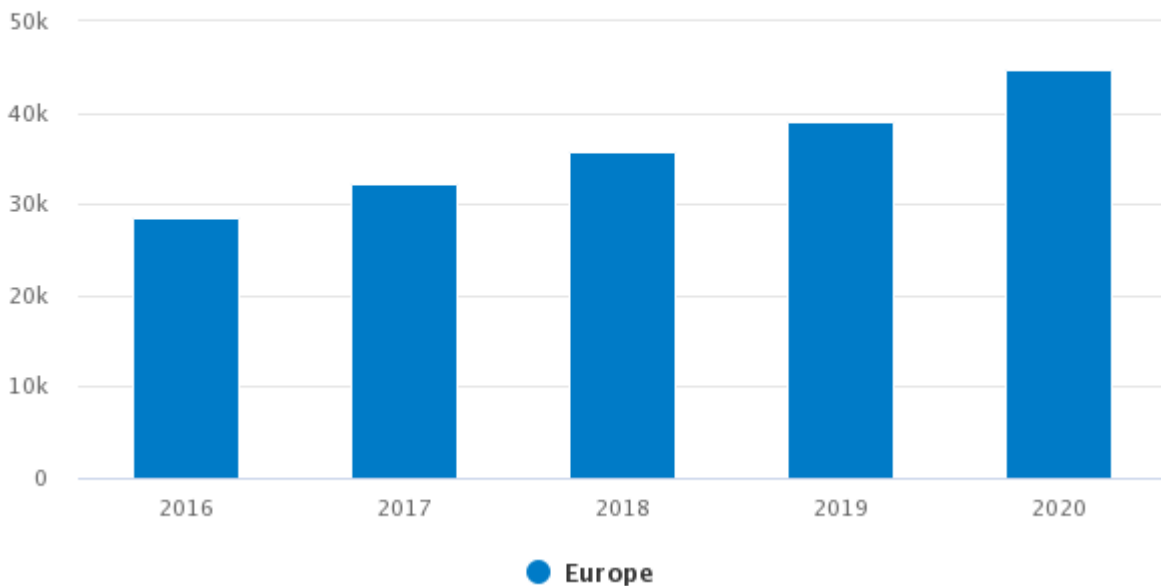
[The global organic spice market was worth €17 billion in 2021](#) and is estimated to reach a retail sales value of almost €20 billion in 2026. This means an annual growth rate of 7.5% between 2021 and 2026. North America and Europe are the largest markets for organic spices. Within Europe, the growth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

seven years).

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).

Figure 2: EU organic sales

in € million



Source: Eurostat, 2018

Source: FiBL, 2022

Tips:

Read the latest version of the FiBL/IFOAM 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 spices and herbs](#) 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](#).

Make a business plan before producing organic spices. The industry estimates that productivity during the conversion phase to organic farming tends to decline, sometimes by as much as 30%. The conversion phase usually takes two years, so take this into account when investing in organic production, as a higher price will be generated only after this period.

Improve your good agricultural practices and consider the production of spices and herbs without using pesticides. Some countries have already gained a good image as sourcing origins that grow spices without the use of pesticides (such as Peru for the production of ginger, Thailand for the production of turmeric and Cambodia for the production of pepper).

7. Demand for new flavours fuel the market for ethnic foods in Europe

New flavours are becoming more popular in Europe. European consumers continue to show a growing demand for ethnic flavours and spice blends, a trend that accelerated during the COVID-19 pandemic. With limited travelling, consumers' desire for exotic flavours only grew, and [spices were used to add an 'exotic effect' in cooking](#). The trend is also inspired by the growing offer of online home delivery food, resulting from [the crisis in Europe's food service sector](#), which sustained itself beyond the peak of the pandemic.

[African, Japanese and Middle Eastern cuisines](#) have gained popularity in recent years, next to the ever-growing general trend in Asian foods. There is [forecasted growth in specific Southeast Asian cuisines too](#): Indonesian, Malaysian and Filipino. Apart from Europeans' interest in Asian cuisines, the increasing demand for Asian food is also linked to demographic changes in Europe. The multicultural population of 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.

In terms of products, sumac berries, for example, have grown in popularity, since they are one of the ingredients used in zaatar spice blend. Other popular spice blends inspired by Middle Eastern cuisine include baharat, berbere, zhug, chermoula and ras-el-hanout.

The increasing demand for ethnic (particularly Asian) food in Europe also influences the use of certain spices in product development. For example, many Asian and South Asian recipes use cinnamon, cloves and cardamom as ingredients. This influences demand for these spices in products like curry pastes and Ayurvedic tea blends. It is estimated that [chai-based product launches doubled in Europe](#), including in [the ice cream sector](#).

Also related to product development and re-formulation, European consumers are searching for umami alternatives to monosodium glutamate. Umami is one of the five category of basic tastes in food (others are sweet, sour, bitter and salt). Companies producing flavouring agents added umami taste by adding monosodium glutamate to spice mixtures and sauces, but consumers are now turning to natural alternatives, such as Japanese soy-based sauces and pastes, including miso, teriyaki and katsu.

Some special types of traditional spices, such as special pepper or special chillies, have also grown in demand. One of the problems with new spices and herbs are pesticide residues, which are often above the required minimum limits. One of the stronger trends is the development of vegetarian spice mixes aimed at meat replacement food solutions.

Figure 3: Umami paste



Source: Albert Heijn

Figure 4: Zaatar spice blend



Source: Waitrose

Tips:

Cooperate with European companies when offering new spice blends. Sometimes, original blends need to be adjusted to the local taste to appeal to consumers in the target market. Some of the leading brands may even be ready to support you in developing start-up products. A good example of the promotion of spice mixes from Morocco and Lebanon is [Al'Fez](#), a brand owned by the UK company [AB World Foods](#).

Invest in social networks marketing. Demand for specific spices is also created by bloggers and celebrity chefs ([Jamie Oliver](#), for example). The most commonly used online channels to advertise your spices in Europe are Facebook, LinkedIn, YouTube and Instagram. Focus your efforts on some of the social platforms mentioned to promote your products.

Make sure to provide complete documentation and specifications of your spices and herbs to European buyers. This information will allow them to assess the potential of your product in different applications and in product development. Besides lab analysis parameters, note the importance of botanical identification and description of detailed organoleptic characteristics of spices and herbs.

European growth in plant-based diets

Veganism and vegetarianism are part of a trend in plant-based diets that is strongly growing in the European market. Many spices used in the meat processing industry are now also used in vegan and vegetarian alternatives to meat. This trend helps to maintain a stable demand for spices, as similar mixes are used in both the meat and meatless industries.

The European plant-based food sector grew by 49% between 2018 and 2020, reaching a total sales value of €3.6 billion. [Plant-based milk leads the market in most European countries, followed by plant-based meat](#), which grew by 31% in terms of sales value in that period. These and other products, like plant-based yoghurts, dairy-alternative drinks and vegan cheeses drive up demand for spices and herbs.

The trend in plant-based diets has no large influence on sourcing, but it influences spice mixing and ingredient companies, which are now making more innovative flavour mixes. The same spices used in meat processing, such as chillies or pepper, are now used to produce meat alternatives that resemble the taste of meat.

Tips:

To tap into the meat substitutes trend, connect with the leading food ingredient companies in Europe to explore possibilities for direct supply of spices instead of through intermediaries.

Learn more about food ingredient trends and developments and meet industry operators at the main food ingredient trade shows in Europe, like [FI Global](#) and [Vitafoods](#). The [Free From and Functional Retail Exhibition](#) is another interesting event to explore in this niche market segment.

Chillies and spicy food are a growth segment

According to research conducted by ingredient supplier [Kalsec](#), consumers globally are eating spicy foods more often than they were one year ago. This growing interest in spicy food is expected to continue in the next few years. This is reflected in European demand, since European imports of dried chillies grew continuously between 2017 and 2021 by 7.5% in value and 6.1% in volume each year, reaching a value of €449 million and a quantity of 178 thousand tonnes in 2021.

Although chillies are in demand, the level of heat is decreasing. According to industry insights, the frequency of consumption of hot and spicy foods is increasing, but [heat levels are moderating](#). While consumers are still incorporating heat into their consumption patterns, heat is taking on more complexity, such as sweet heat combinations or ethnic cuisines that combine a variety of spices and herbs with some type of chilli pepper. Most European imports include products that are moderately pungent.

Flavorchem's 'Flavor & Trend Forecast' anticipated an increasing demand for hot flavour. Such flavours include habanero, chamoy sauce, ghost pepper, guajillo, gochujang, Nashville Hot, chipotle and Carolina Reaper pepper. The demand for hot flavours also raised the interest of consumers in different chilli types. Flavour company Wixon revealed that Jalapeno is the most prolific pepper type across the category, but also saw a rise in interest in chilli types that add heat and depth of flavour, including aji amarillo, guajillo, habanero and poblano. McCormick's Flavor Forecast reinforces this trend, [bringing further attention to Tien Tsin and Chile del Arbol as well](#).

There's also interest in spicy-and-sweet blends, with Flavorchem's report noting, "Flavor mashups like spicy hot, savory, and sweet provide multidimensional heat as sweet heat climbs the ladder, with two thirds of Americans expressing interest in the spicy and sweet combination that includes profiles like honey siracha and mango habanero."

Despite growing demand, it is important that you pay special attention to authenticity issues in chillies. European producers are faced with the offer of wrongly declared types of chillies. Also, additives such as colour enhancers (e.g. Sudan dyes) and flavour enhancers (e.g. oleoresins) are not always declared, which is considered fraud. Dried chillies are among the focus products of the [EU-wide survey about herbs and spices authenticity](#), published in 2021. The study evidenced that the percentage of samples deemed at risk of adulteration for paprika/chilli was lower than for other products, at 6%.

Tips:

Consider offering special types of chillies to the European market. European buyers are actively searching for new chillies and spicy flavours for European consumers in new sourcing destinations, such as countries in Africa.

Consider the development of new chilli spices of moderate heat level. More complex flavours can be achieved by searing, roasting, toasting or smoking a pepper rather than using the chilli without further processing.

Make sure to provide complete documentation and specifications of your dried chillies to European buyers. This information will allow them to assess the authenticity of your product and to develop trust. See the example of a product specification sheet from the Dutch company 12Taste [to identify the type of data that can be useful to your potential buyers](#).

Check out our study on the [European market for dried chillies](#), and watch [our webinar highlighting the opportunities for dried chillies and capsicums](#).

8. Growth in spices with health benefits beyond COVID-19

The market for most spices is growing on average at an annual growth rate of approximately 4%. However, several spices promoting immune system support registered higher growth rates due to the COVID-19 pandemic, and continue to grow into 2022. Heavily promoted spices such as ginger, curcuma and garlic are increasingly demanded by end consumers, particularly due to social media marketing. There is also increasing demand in Europe for food and beverages promoting health, [such as gut health or holistic health](#).

European [imports of ginger](#) increased from 175 thousand tonnes in 2019 to 202 thousand tonnes in 2021. Consumers favour fresh ginger to dried, but dried ginger also continues to grow strongly. Ginger juice is a relatively new product increasingly imported to Europe, used in new drinks called 'juice shots'. Ginger syrup is another product with growing demand. Ginger remains popular due to its perceived [health benefits](#).

Curcuma is used both as a spice and in the production of curcumin, which is used in food supplements. European imports of curcuma increased by more than 4.0 thousand tonnes between 2019 and 2020, totalling nearly 32 thousand tonnes in 2020. In 2021 imports remained high, at 31,000 tonnes. Curcuma is widely used in ayurvedic preparations and Ayurveda-inspired herbal mixes, and is [considered to be a 'superfood'](#) due to its anti-inflammatory activity, among other properties.

[Dried garlic](#) had a very strong import growth in Europe between 2020 and 2021, from 111 to almost 120 thousand tonnes. Garlic has already been proven to [prevent the common cold](#) and is used in traditional medicine worldwide. A basic staple of recipes in many cuisines, garlic's popularity and immunity-boosting properties helped increase garlic imports. Use of garlic oil in food supplements is also growing.

[Black pepper's](#) active component piperine can improve the absorption of other supplements. Currently, it is most often used in combination with curcuma and its active component – curcumin. When curcumin is used as a food supplement alone, some quantities are not used by the body, but removed through urinary excretion. However, absorption of curcumin is enhanced when it is combined with piperine.

Other spices that saw growing demand in recent years due to their presumed health benefits include green herbs with antioxidant properties (rosemary, basil), cinnamon, cloves and black cumin seeds. The [European Spice Association](#) provides information on the health benefits of spices, including in traditional or alternative medicine, such as Ayurveda.

Many spices and herbs are also promoted as [salt replacers](#), for example, by the British Heart Foundation. Examples include mint, rosemary, nutmeg, basil, cardamom, chilli, cinnamon, chives, coriander, dill, cumin, ginger, oregano, paprika, parsley, sage, thyme and turmeric. Several large food processors such as Unilever already amended their recipes to reduce salt intake by using herbs instead. Many herbs also fit into contemporary eating trends, such as [Paleo](#) and [Sirtfood](#) diets.

This is also driven by European institutions, as actions are being taken in several countries to reduce the dietary intake of table salt (sodium) and sugar in preparations. The EU has specific political actions that influence the industry, like the [Salt Campaign](#) and the [updates in EU regulation to reduce the potential impact of sugars on human health](#), which have the scientific backing of the [European Food Safety Authority](#).

Tips:

Be careful when promoting the health benefits of spices and herbs. Some studies did not find enough proof of curing specific illnesses. European [food labelling legislation](#) strictly forbids misleading the consumer. Claims that a portion of food prevents, treats or cures a human disease cannot be made. Refer to the [Health Claims Register](#) to find out which claims are allowed in the European market.

Read more about popular spices in Europe in the CBI studies on the [European curcuma market](#), [European dried garlic market](#) and [European ginger market](#).

Check out the websites of [Food Navigator](#) and [Food Ingredients First](#) to learn more about food health trends and other developments in the food sector.

Explore opportunities for cooperation with the health and food supplement sector. To satisfy the needs of those demanding importers, it is important to have regular laboratory tests. Read more about European Buyers in the health segment in the CBI study on [finding buyers in the health products sector](#).

Extracts offer the possibility to generate added value in the country of origin, but need to be developed in close coordination with the market in order to meet clients' specifications. Read more about specific [buyer requirements for the health products sector](#).

Figure 5: Organic turmeric food supplement



Source: Holland & Barrett

Figure 6: Garlic food supplement



Source: Strongus

9. Innovations in (consumer) packaging and sustainable materials

One of the main changes regarding packaging will be the switch to sustainable materials. In November 2018, more than 250 organisations signed the [new commitment](#) to eliminate plastic when it is problematic or unnecessary and to shift to reusable packaging. By 2025, they plan to make all plastic packaging either reusable, recyclable or compostable. Every year, they will share public reports on their progress.

Another trend related to spices is smaller portions in consumer packaging. People often only need small portions, because they want to try out a recipe, for example. Very small packaging options for spices and herbs have therefore increasingly appeared in retail chains across Europe.

The small bags included in meal kits are a very specific example of small spices or herbs portions. [A meal kit](#) is a package of ingredients to cook a meal, primarily with meat, fish, poultry, vegetables, sauce and spices. Consumers mix the ingredients and cook the meal according to the instructions provided. Sales of meal kits in grocery stores have increased, as they are easier for consumers and prices are acceptable.

Tips:

Consider replacing plastic bags with paper bags or carton boxes when packaging spices and herbs, in order to meet the sustainability requirements of European importers.

Find out which companies supply spices and herbs to meal kit producers in order to research possibilities for direct export.

10. The growing importance of origin and origin protection in Europe

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 likewise become more interested in the agro-climatic features of production areas, and

the stories of producers and their communities. In the case of spices, single origin also highlights unique potencies and unique 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 prevention of cross-contamination from pesticides are crucial. The single-origin trend provides opportunities for less traditional origins to tell their story and for traditional origins to consolidate their position.

There are several examples of single-origin recognition in spices: [Dutch spice company Bold Spices sells cinnamon from Vườn Quốc gia Hoàng Liên](#) in Northern Vietnam. This cinnamon comes from the bark of the *Cinnamomum loureiroi* tree, a variety of cassia, which [has a high concentration of essential oils and pronounced flavour](#). The company also offers other single-origin spices from less-known origins like cardamom from [the lush hills of Antioquia, Colombia](#) and [wild harvested Andaliman pepper from the forests North Sumatra, Indonesia](#). There is also the Danish company Mill & Mortar, whose spices like cardamom, coriander, cinnamon, cloves, cumin, ginger and mustard plus several other [organic and fair trade-certified products](#) come from forest garden harvests in Sri Lanka. UK-based Rooted Spices also focuses on single-origin spices, like its [Ceylon cinnamon from a Kandyan Forest Garden in Sri Lanka's Central Highlands](#).

For some spices, origin also distinguishes different species and their qualities. This is particularly the case for Ceylon cinnamon. In 2022, Sri Lanka received its [first-ever Protected Geographical Indication \(PGI\) certification from the European Commission](#) through [Regulation \(EU\) 2022/144](#). The purpose of the PGI is to differentiate Ceylon Cinnamon in the EU market from its lower-quality substitutes. The PGI recognised the exclusive quality coming from the cinnamon's specific origin and the associated harvesting and processing know-how and techniques. The botanical names *Cinnamomum zeylanicum* or *Cinnamomum ceylanicum* can still be used in the labelling of products from other origins, but the country of origin outside Sri Lanka must be also indicated.

Also in 2022, the Poivre de Penja of Cameroon (Penja pepper), a white pepper grown in volcanic soil, [received the second-ever African Geographical Indication \(GI\) in the European register](#). The geographical area of Poivre de Penja PGI is the Penja Valley, located on the hills south of Mount Koupé between the Littoral and South-West regions in Cameroon.

Tip:

Explore the possibility of adding value to your spice and targeting high-end buyers by highlighting the characteristics that are unique to your company and to the producing regions you're sourcing from. This will make your spice or herb more attractive, especially to ethical and premium buyers who are interested in high-quality and unique profiles.

11. New origins in Asia and Africa are coming up!

The majority of spices imported into Europe are produced in tropical climate zones, often in countries other than their original source. Ginger, for example, was originally produced only in Asia and is nowadays widely produced in African countries, [including Nigeria](#). China and India, which were traditionally European suppliers, are becoming the main spice importers worldwide. This is because their domestic crops cannot meet domestic demand. This leads to the development of new production and sourcing destinations.

Cambodian pepper production illustrates this shift in the spices sector, where Cambodia increased production and exports to match the needs of neighbouring countries. Cambodia underwent major changes in its position in the world market for peppercorn; its 2022 output is forecasted to rise by around one tenth over 2021. Most Cambodian pepper is produced without chemical inputs, and is bought mainly by Vietnamese importers to mix it

with Vietnamese pepper and reduce pesticide levels in order to meet European requirements.

Another example can be found in the vanilla industry. For decades, Madagascar has dominated the vanilla supply. However, new countries have emerged in recent years on the supply side. While Indonesia and Uganda already appear among the main vanilla suppliers to Europe in 2021, other small producers like Jordan and Thailand have very incipient sectors and do not have significant market shares. Also, Israel has announced that it will start more intensive production of vanilla.

Sourcing spices and herbs from only one origin can be very risky, as buyers experienced during the COVID-19 pandemic. In spring 2020, lockdown measures and even border closures were implemented in India and Vietnam, making it impossible to source from those destinations. As Vietnam is a major supplier of black pepper and India is a major supplier of several other spices (chillies, curcuma, cumin), this affected the world supply of both products.

Another, long-term issue is the impact of climate change on the sourcing of spices and herbs. Natural disasters such as floods and droughts are becoming frequent worldwide. If production is concentrated to one or a few countries, natural disasters can completely disrupt the supply chain. For example, in 2018, severe floods due to heavy rainfalls affected the south Indian state Kerala. This caused a shortage of cardamom, as Indian export decreased from 5 to 3 thousand tonnes.

Also, global climate change is influencing the quality of produced spices. For example, too high temperatures increase the percentage of light berries and pinheads in black pepper, abortion of cardamom flowers and degradation of vanilla beans. High rainfalls also stimulate the development of fungi and plant disease. Therefore, European spices and herbs buyers prefer to source products from more than one destination to mitigate sourcing risks.


Many European buyers are currently searching for new opportunities to source spices and herbs from countries in Africa. Some potentially attractive origins include Tunisia (culinary herbs), Uganda (vanilla, cinnamon, cloves, special chillies), Kenya (chillies), as well as Ghana, Senegal, Mali, Tanzania, South Africa and Zimbabwe.


Tip:


Use the opportunity to offer products of a new origin. Many European importers will be interested in exploring new sourcing options in order to reduce supply risks due to the impact of climate change impact on supply.

This study was conducted on behalf of CBI by [Autentika Global](#), and updated by [Gustavo Ferro](#). Please review our [market information disclaimer](#).

Follow us for the latest updates

(opens in a new tab)  Twitter

(opens in a new tab)  Facebook

(opens in a new tab)  LinkedIn



RSS