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EU MARKET SURVEY 2002

SPICES AND HERBS

EU MARKET SURVEY 2002

SPICES AND HERBS

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries. To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information
- CBI News Bulletin (6 times annually);
- CBI guide "Exporting to the European Union";
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Manuals on subjects such as, trade fair participation, Fashion Forecast etc.;
- CBI's extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the AccessGuide database on European non-tariff trade barriers;
- CBI' s Trade Documentation Centre offering demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services
CBI's computerized exporters' and importers' databases, containing regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export development programmes (EDP)
Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand- driven and flexibility are combined with fixed elements such as:
- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development
- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO's, aiming at supporting BSO's in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide –through their associations- specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation
CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

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SPICES AND HERBS

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ProFound

CONTENTS

REPORT SUMMARY

This market survey profiles the EU market for spices and herbs. The emphasis of the survey lies on those products which are of importance to developing country suppliers. The major national markets within the EU for those products are highlighted. The survey includes contact details of importers, trade associations, and other relevant organisations. Furthermore, statistical market information on consumption, production and trade, and information on trade structure and prices and margins is provided.

As an exporter, you need this information to formulate your own market and product strategies. In order to assist you with this, CBI has also developed a matching EU Strategic Marketing Guide "Spices and Herbs". It offers a practical handbook for exporters engaged, or wishing to engage, in exporting spices and herbs to the European Union. It aims to facilitate exporters in formulating their own market and product strategies, through the provision of practical information and a methodology of analysis and ready-to-fill-in frameworks.

As mentioned above, statistical market information on consumption, production and trade, and information on trade structure and prices and margins, which is required for the ready-to-fill-in frameworks, can be found in this EU Market Survey.

Market research
This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read this survey and filled in the frameworks in the strategic marketing guide it is important to further research your target markets, sales channels and potential customers.

Market research depends on secondary data (data that have been compiled and published earlier) and primary data (information that you collect yourself). An example of secondary data is this EU Market Survey.
Primary data are needed when secondary data fall short of your needs, for example when researching your specific type of consumer about the acceptance of your specific product. Sources of information are among others (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, but also shops in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors.
After you have received/collected your information you should analyse it. In order to judge the attractiveness of the market, sales channel or customer, you should use/develop a classification or score system.

For more detailed information on market research, reference is made to "CBI's Export Planner 2000."

Consumption
According to FAO data, total EU apparent consumption of spices and herbs (production plus imports minus exports plus changes in the stocks) amounted to 161 thousand tonnes in 2000. The leading consuming country is Germany, accounting for over a quarter of total EU consumption in 2000, followed by the United Kingdom, The Netherlands and France.

The consumption of spices and herbs can be divided into three end-user segments: the industrial, the retail and the catering sector. In almost all EU countries the industrial sector consumes the largest proportion, accounting for 55-60 percent of the total usage of spices and herbs. The retail sector consumes 35-40 percent and the catering sector 10-15 percent.

Thanks to increased prosperity in the EU and the changing composition of the population (increase of single households, more ethnic groups), life style and consequently eating behaviour has changed in the EU. Recent research into consumer behaviour shows that today's consumer has the following preferences concerning food and nutrition in general, and spices and herbs in particular:

→ Convenience
→ More variety and ethnic foods
→ 'Grazing'
→ Organic food
→ Health food
→ Environment consciousness

Production
Few spices are produced in the EU. According to FAO (2002), total EU production of spices amounted to 15,110 tonnes in 2001, of which 76 percent consisted of pimento, 7 percent of anise/badian/fennel and 17 percent of other spices. Spain is, by far, the leading EU producer. No statistics on herb production are available.

Imports
After an increase of 4 percent in the imported value between 1998 and 1999, imports of spices and herbs by EU member countries decreased by 4 percent in value, amounting to US$ 786 million, in 2000.

In terms of volume, imports amounted to 261 thousand tonnes in 2000, representing an increase of 5 percent since 1998.

In 2000, Germany was the leading EU importer of spices and herbs, accounting for 23 percent of the total imported value by EU member countries, followed by The Netherlands (21%), France (13%), the United Kingdom (12%) and Spain (8%).
It should be noted, however, that most of the imports have been re-imported from other EU member countries or will be re-exported to other EU member countries or to countries outside the EU.

Pepper and paprika were, by far, the leading product groups imported by EU member countries in 2000, in both terms of value and volume. Other important product groups (in terms of value) were: paprika, nutmeg, vanilla, mixtures, other spices, ginger and saffron.

Developing countries play a major role in the supply of nearly all spices and herbs, particularly turmeric, cumin, saffron and anise or badian seeds, to the EU. These countries supplied more than 70 percent of total 2000 imports (in value) of these products directly to the EU member countries. Other important groups were cloves, mace, cinnamon, vanilla, pepper, ginger, cardamom and nutmeg, of which more than half of the imported values was supplied directly by developing countries in 2000. Most of the spice and herb imports originate entirely in developing countries, but are re-exported by other (EU member) countries, which largely blurs the import statistics for spices and herbs.

Exports
In 2000, the EU member states together exported about US$ 403 million of spices and herbs. In terms of volume, exports amounted to about 121.5 million tonnes in the same year. It should be noted that a large part of the EU export trade consists of spices and herbs which have been imported in bulk or in crude form and which, following grinding, processing and/or repackaging, are re-exported to other EU and overseas markets. The only spices which originate in large quantities within the EU are paprika, saffron and caraway seed.

Trade structure
Spices and herbs normally have the same trade structure and distribution channels and very few traders deal exclusively in spices and / or herbs. The bulk of the trade enters the EU through a small number of major brokers and trader/importers. In the past few years, direct trade between medium-sized and large producers / exporters in developing countries and grinders / manufacturers in consuming markets has become more prevalent. Manufacturers / importers increasingly move away from dealing with many small growers, choosing instead to deal with whoever can give them a high quality, high volume, and consistent product.

Typically the main parties involved in the distribution of spices and herbs are:
- Agents / brokers
- Traders / importers
- Grinders / processors
- End users (mainly the industrial sector)

The functional distinctions between the different types of traders described above have become blurred in recent years because of structural changes in the trade and a decline in the number of brokers and traders in Western Europe as a whole. Different types of trading activity are often carried out at the same time within one company.

Opportunities for developing countries
Competition in the food sector is strong and quality requirements are high. Most of the spices and herbs are imported for industrial use and will be further processed and packaged in consumer or catering packs by the European food-processing industry.
Competitive issues in the spice and herb market are quality and consistency of quality, followed by strong research and development in order to provide innovation and a variety of flavours.

The advice that we can give in order to be successful in the competitive food market is:
- Offer a 'concept': a product should include complete product specifications, suggestions for application, instructions on how to store and to process, proposals for product presentation, information on quality assurance (e.g. HACCP) or even ISO certification.
- Go 'organic': healthy, natural and organic products are occupying an increasingly stronger position in the EU. This applies to the consumer market as well as to the food industry. Organic production is particularly attractive for growers in developing countries, since much of their food production is already organic or can be changed to organic.
  For more information, please refer to CBI's EU Market Survey "Organic Food Products".
- Adopt HACCP: adopting a system of quality control will be a very positive argument in the export business.
- Adopt standards for Good Agricultural Practice (GAP).

The usage of spices and herbs in the EU is increasing because these products are appreciated as completely natural ingredients, rather than artificial additives. Apart from being directly used by the industrial and catering sectors as well as consumers, they are also the starting points for the production of many flavours and components of flavours. This implies that there is a growing market.

Consumption of convenience and ethnic foods is also expected to increase, because more and more people are eager to try the new and varied taste of foreign foods.

In the extremely competitive food-processing industry, new authentic varieties of mixed spices and herbs, e.g. pimento, chillies, allspice (Jamaican pepper) etc., can be introduced in the EU by exporters from developing countries. The health food sector is also a growing market, as industry and consumers focus more on healthy food and natural flavours as substitutes for sugar, salt and artificial products.

1 PRODUCT CHARACTERISTICS

1.1 Product groups

The subject of this report is the market for spices and herbs. The main international trade concerns spices and herbs, dried and in crude form, cleaned but not further processed. It is estimated that about 85 percent of the trade is in this form. The remainder concerns crushed or ground spices, essential oils or oleoresins.
Information on related products may be found in the following CBI market surveys:

- "Food Ingredients for Industrial Use"
- "Organic Food Products"
- "Natural Ingredients for Pharmaceuticals"
- "Natural Ingredients for Cosmetics"

The main spices and herbs covered by this market survey are:

Spices	Herbs
Pepper	Parsley
Paprika	Marjoram
Capsicum (chillies and cayenne pepper)	Oregano
Coriander	Thyme
Cinnamon	Bay leaves
Ginger	Rosemary
Nutmeg	Basil
Caraway	Mint
Turmeric	Savoury
Cumin	Dill
Cloves	Tarragon
Mace	Sage
Cardamom	
Anise or badian seeds	
Fenugreek	
Saffron	
Vanilla	
Fennel seeds	
Juniper berries	

Herbs are aromatic plants whose leaves, stems and flowers are used as flavouring. Spices, on the other hand, also come from aromatic plants, but are derived from the bark, roots, seeds, buds and berries.

Curries and other mixtures of two or more spices are also included in this survey and are called "mixtures" in all chapters and trade statistics. The ready-to-use spice mixtures are mixes of spices and herbs combined with salt and often with garlic, lemon, dried vegetables or other ingredients. Appendix 1 gives a description of each major spice/herb and its use.

1.2 Customs/statistical product classification

The HS code groups for spices and herbs covered by this survey are grouped under the headings in the following table. A detailed list of HS codes can be found in Appendix 1. Only two herb varieties, thyme and bay leaves, have specific HS codes.
There are no official figures on other herbs, which are generally classified in trade statistics either as "other spices" (HS code 091099) or "other vegetables" (HS code 070990). The relevant HS code groups for spices and herbs in this report are:

HS code	Product group
0904 11	Pepper of the genus *Piper*, whole (black/white)
0904 12	Pepper of the genus *Piper*, crushed or ground (black/white)
0904 20 10	Dried paprika (sweet peppers) of the genus *Capsicum or Pimenta*, whole
0904 20 31/35/39	Dried fruits of the genus *Capsicum or Pimenta*, whole (red/green peppers and chillies)
0904 20 90	Paprika powder of the genus *Capsicum or Pimenta*
0905	Vanilla
0906	Cinnamon and cinnamon-tree flowers
0907	Cloves: whole fruit, cloves and stems
0908 10	Nutmeg
0908 20	Mace
0908 30	Cardamoms
0909 10	Anise or badian seeds
0909 20	Coriander seeds
0909 30	Cumin seeds
0909 40	Caraway seeds
0909 50	Fennel seeds or juniper berries
0910 10	Ginger
0910 20	Saffron
0910 30	Turmeric – curcuma
0910 40	Thyme; bay leaves
0910 50	Curry
0910 91	Mixtures of two or more of the products of different headings
0910 99	Other spices

Chapters 5 and 6 of this survey are structured according to the HS codes as summarised in Section 1.2, while the remaining chapters may also cover other species, which are mentioned in Section 1.1.

Consequently, this places limitations on in-depth interpretation of trade figures and of the possible relationships between import figures and production and consumption data.

2 INTRODUCTION TO THE EU MARKET

The European Union (EU) is the current name for the former European Community. Since 1 January 1995, the EU has consisted of 15 member states. Negotiations are in progress with a number of candidate member states, many of which already have extensive trade and co-operation agreements with the EU.

According to the first demographic estimates for 2001, published on January 11, 2002 by Eurostat, the population of the EU on 1 January 2002 was expected to total 379.4 million. While the pace of population growth in the EU has slowed greatly in the last 30 years, the increase of 0.4% in 2001 was slightly higher than the figure in recent years. Total GDP in 2000 equalled US$ 7,856.6 billion (€ 8,827.6 billion) at current prices, while the average GDP per capita (at current exchange rates) amounted to US$ 20,759 (€ 23,325) in 2000 (OECD, 2002).

The most important aspect of the process of unification (of the former EC countries) which affects trade is the harmonisation of rules in the EU countries. As the unification allows free movement of capital, goods, services and people, the internal borders have been removed. Goods produced or imported into one member state can be moved around between the other member states without restrictions. A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, the regulations have not yet all been harmonised. Work is in progress on uniform regulations in the fields of environmental pollution, health, safety, quality and education.

On January 1, 2002 the euro (€) became the legal currency used in 12 EU member states. It had already been in use since 1 January 1999, by banks as legal currency in eleven EU member states: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Greece joined the Economic and Monetary Union (EMU) on 1 January 2001.

The most recent Eurostat trade statistics quoted in this survey are from the year 2000. In 1998, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On 1 January 1999, statistical and contractual values in ECU were converted into euros on a 1:1 exchange rate. The € / US$ exchange rate currently (October 2002) stands at around US$ 0.98 for one euro.

The US$ is the basic currency unit used to indicate value in this market survey. The Eurostat trade statistics are based on the € values and transferred into US$ with the exchange rates presented below.

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory Customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat cannot now depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about € 100,000. As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.

Markets of selected EU countries are highlighted since their markets are relatively more important than the markets of other EU countries (in terms of production, consumption, imports and exports).

Exchange rates of EU currencies in US$

Country	Currency	1997	1998	1999	2000	2001	Oct. 2002
European Union	ECU	1.13	1.12	–	–		–
	€	–	–	1.06	0.92	0.89	0.98
Denmark	DKr	0.15	0.15	0.13	0.12	0.12	0.13
Sweden	SKr	0.13	0.13	0.12	0.11	0.10	0.11
United Kingdom	GB£	1.64	1.66	1.62	1.51	1.45	1.56

Source: CBS Statline (November 2002)

This survey focuses mainly on the following EU member countries:

- **The Netherlands** is an important intermediary in the global trade of spices and has a long tradition in this field. The Netherlands imports about 90 percent of its spice requirements directly from the countries of origin and redistributes large quantities to the other EU member countries.

- **Germany** is a major trader, processor and re-exporter of spices. Hamburg, along with New York, Rotterdam, Singapore and London, is one of the key global trading centres.

- **France** is an important EU market for spices and herbs, because it is not only a significant importer from developing countries, but also a large producer, consumer and exporter of culinary herbs.

- With its large number of ethnic (mainly Asian) inhabitants and their strong preference for spiced food, the **United Kingdom** is a sizeable market for spices and herbs.

- **Spain** is a relatively large market for spices & herbs and is a major producer and trader of paprika powder and saffron.

3 CONSUMPTION

3.1 Market size

Different statistical sources use different definitions of product groups or specifications. This places limitations on in-depth interpretation of trade figures and of the possible relationships between import figures and production and consumption data. Please note that the figures described in Table 3.1 and Figure 3.1 are FAO data. In some cases, these differ significantly from the figures presented by national organisations.
Figures presented by the national organisations cannot be compared, as they are derived from different sources. FAO is the only organisation presenting EU overall and individual-country comparable figures.

European Union

The EU market for spices and herbs increased from 159 thousand tonnes in 1998 to 161 thousand tonnes in 2000, indicating an increase of about 1.5 percent.

The leading consuming country is Germany, accounting for over a quarter of total EU consumption in 2000, followed by the United Kingdom (21%), The Netherlands (16%) and France (9%). Please note that the FAO uses the concept 'domestic supply' to indicate total consumption within a country. FAO's definition of domestic supply is based on the net result of domestic production plus imports minus exports plus changes in the stocks.

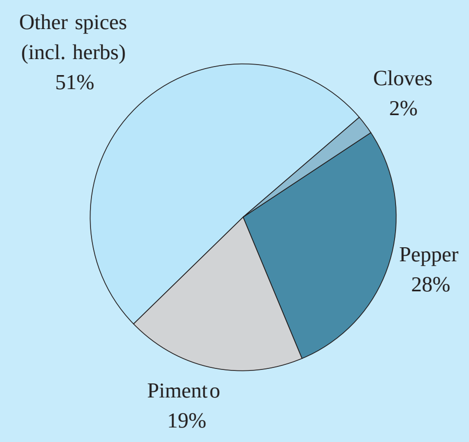
Table 3.1 Consumption of spices and herbs by EU countries, 1998-2000 tonnes

	1998	1999	2000
European Union	**158,920**	**161,631**	**161,240**
Germany	38,310	42,101	44,174
United Kingdom	32,372	32,647	34,655
The Netherlands	19,643	20,113	25,013
France	17,306	17,620	14,212
Belgium-Luxembourg	4,804	4,340	6,799
Spain	17,924	15,198	6,459
Greece	3,396	4,047	5,508
Austria	5,966	5,175	5,434
Sweden	4,337	4,503	4,873
Italy	5,459	6,627	4,859
Denmark	4,803	4,296	3,295
Ireland	1,288	2,093	2,325
Portugal	2,012	1,595	2,132
Finland	1,300	1,276	1,502

Source: FAO (2002)

Pepper, pimento and cloves account for about half of total spice and herb consumption in the EU (FAO 2002). Please note that data on herb species, like bay leaves, dill and thyme are included in the statistics for 'other spices.'

Figure 3.1 Market shares of spices and herbs in the EU, 2000 % of total consumption



Source: FAO (2002)

In almost all EU countries the largest proportion, being 55-60 percent of the total usage of spices and herbs, was consumed by the industrial sector.
The retail sector consumed 35-40 percent and the catering sector 10-15 percent. In most EU markets, the ratio is moving towards higher relative usage by the industrial sector, reflecting the growing popularity of ready-to-use spice mixtures. Another reason for the shift towards higher usage by the industrial sector is the increasing consumption of processed foods and ready-to-eat dishes, which often rely on spices and herbs to retain and enhance the food flavour.

The food and drink industry is of paramount importance for the economy of the European Union. As can be seen in Table 3.2, total EU output of the food and drink industry in the EU witnessed a continuous increase as from 1997, reaching € 593 billion in 2000. The meat industry, the so-called 'other food products', the dairy industry and the beverage industry are the four main food and drink sectors. Germany is the biggest producer of the first two while France and the United Kingdom respectively dominate the other two. Bakery, pastry, chocolate and confectionery products represent more than half the production value in the 'other foodstuffs' category.

Please note that the sectors, which heavily rely on spices and herbs as ingredients – beverages, dairy products, processed fruit & vegetables and other food products – witnessed considerable increases in total output between 1997 and 2000.

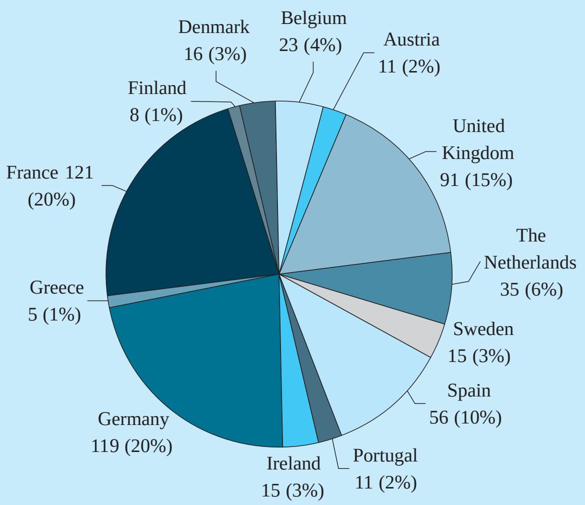
Table 3.2 Total production in the food and drink industry in the EU, 1997-2000 € billion

Sector	1997	1998	1999	2000
Total EU	**535**	**545**	**572**	**593**
Other food products[1]	122	134	143	156
Processed meat	109	102	109	113
Beverages	86	93	93	98
Dairy products	88	88	93	95
Animal feed	34	35	38	37
Processed fruit & vegetables	30	32	35	36
Oils & fats	35	29	26	23
Flour & starch products	20	20	21	21
Fish products	11	12	14	14

[1]this includes bakery, pastry, chocolate, confectionery products, which together account for more than half of the production of this category.

Source: CIAA (2002)

Figure 3.2 Total production of the food and drink industry in the EU, 1998-2000 € billion, share in % of total EUroduction



Source: CIAA (2002)

Germany

With a 23 percent share of the total imported value by EU member countries in 2000, Germany is the largest EU market for spices and herbs.
The per capita consumption of spices and herbs is one of the highest in the EU, estimated at about 850 grams a year (ZMP 1999). Estimations of the total German market for spices and herbs vary between 58,000 and 60,000 tonnes.

Dishes from other European countries such as Italy, Greece, and Spain have been popular among Germans for many years. Both its large foreign population and the fact that more Germans now travel abroad have influenced preferences in domestic food flavours. More travel to South-East Asian countries has created a higher demand for ethnic food, with a corresponding increase in the use of spices, and has encouraged the use of a greater variety of spice mixtures.

Single spices popular among the German are paprika, pepper, nutmeg, cinnamon, cloves, curry and cumin. The most popular ready-to-use spice mixtures are those used for chicken, minced meat, French fries, tomato, onion and pizzas. The ready-to-use mixtures segment has grown fast and is expected to continue to grow, both because of the convenience of pre-mixed spices and because there are now more varieties readily available in Germany.

Fresh herbs are becoming popular, but these still occupy a small market. Herbal teas are also becoming increasingly popular. In 2000, total German consumption of herbal and fruit teas amounted to 32.9 thousand tonnes, representing an increase of 400 tonnes compared to the preceding year. Peppermint tea is by far the most popular herbal tea, followed by camomile tea and fennel tea.

Annual demand for culinary herbs is estimated at more than 5,000 tonnes. Marjoram and parsley are the herbs with the highest level of consumption, at about 1,500 tonnes per year, but the usage of thyme, bay leaves, basil and oregano is also significant. Parsley and marjoram are grown commercially in Germany but the bulk of other dried herbs comes from Spain, Morocco, Egypt, Turkey, Hungary and Poland.

Because of growing consumer resistance to industrially manipulated ingredients, there is a rising demand for organically grown food. Germany is one of the world's largest producers and consumers of organic foods. Comprehensive ranges of organic spices are sold in the German market.

The organic market is presently growing at a slower pace in Germany than in some of its neighbouring countries. Nevertheless, Germany continues to support the largest organic market in Europe with retail sales over € 2 billion. This amounts to 1.6 percent of total German food sales and is expected to grow by 10-15 percent every year.

The Netherlands

Although by itself a small consumer of spices and herbs in comparison with its neighbour countries, The Netherlands is an important intermediary in the global trade of spices and has a long tradition in this field. Apart from caraway seed and some fresh herbs, no spices are produced domestically in any significant quantity.

The Netherlands market for spices and herbs is stable, with annual sales fluctuating around € 52.6 million, which represents a per capita consumption of € 3.25.

Spices and herbs in small sachets are the most popular product bought by the Netherlands consumers, who tend to buy glass jars first and, when they buy refills in a sachet, transfer the contents to the glass jars. Around 40 percent of spice purchases is refills; tins and glass jars account for 15 percent of demand. The glass jars are marketed by one supplier and often are subsequently used to contain the product of another. Glass pots and plastic cans account for 6 percent of the total, and tend to be bought only once for a specific spice. Spice mixtures in plastic cans for special recipes are sold in larger quantities, generally between 50 and 125 grams per unit. These account for 35 percent of the market and are growing in relative importance.

With its multicultural population, there is a growing preference for ethnic food and an increasing interest in boosting the taste of traditional meals.
Moreover, as in most other EU member countries, there is a growing popularity among Netherlands consumers for convenience food, e.g. ready meals or cooking sauces, in which all the adding of ingredients, including spices and herbs, has already been done. The Netherlands people also eat meals out of the home more often than before and commercially prepared foods tend to use higher concentrations of spices and herbs.

The ranges of ready-to-use spice mixtures for minced meat, which is very popular in The Netherlands, have expanded. Also, other varieties of spice mixtures such as those used in the Italian, French, Asian and Mexican cuisine have all been introduced into the Netherlands market with success. These new mixes have inspired Netherlands consumers to try out favourite restaurant menus at home. This has created an opportunity for grinders and processors to add value by designing special spice mixes for particular flavours with different or high-quality ingredients.
The increasing interest in the cuisine of other cultures has led to higher demand for individual dried herbs such as basil, oregano, sage, cardamom and ready-to-use herb mixes. Examples are: pizza-mix (Italian), mix Provençale (French), mix Toscane (Italian), shoarma-mix (Arabic), cajun-mix (Mexican), chicken Tandoori-mix (Indian), chicken Szechuan (China) and various mixes for other popular international dishes.

According to Information Resources GfK, annual sales of fresh herbs in The Netherlands are estimated at about € 6 million. The Netherlands consumer is becoming more familiar with fresh herbs, mainly parsley, celery, chives, dill weed, basil, coriander, mint, chervil, marjoram, oregano, rosemary and thyme are increasingly retailed in supermarkets. Consumers can buy them throughout the year in plastic hanging packs under the supermarket's own label, in 'flowpack' (cut and packed) or in plastic pots that can be kept on the kitchen window still to be used whenever needed.

Fresh herbs represent a growing niche market with several advantages. Consumers are encouraged by means of television cookery programmes and recipe columns in women's magazines and newspapers to try 'the real thing' (as opposed to dried herbs). They are seen by many consumers as being superior and more healthy and their limited shelf life can be simply extended by freezing. Fresh herbs are now sold mainly in mixes, e.g. Provençale and Italian mixes.

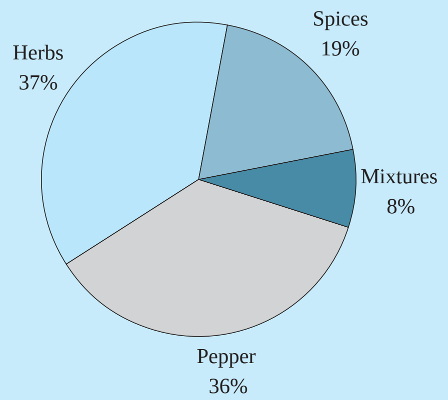
Whereas fresh herbs are mainly used in home cooking, large volumes of dried herbs are used in the food-processing industry for the preparation of soups, sauces, ready-to-eat meals, frozen pizza, etc.

France

France is an important EU market for spices and herbs, because it is not only a significant importer from origin countries, but also a large producer, consumer and exporter of culinary herbs. In 2000, total French consumption of spices and herbs amounted to € 155.5 million, representing an increase by 6 percent compared to the preceding year.
As is shown in Figure 3.2, French consumption of peppers (white, black, red and green peppercorns, chillies, cayenne pepper) is high, accounting for 36 percent of the total spice and herb consumption. The largest increases took place in the sales of mixtures (15%) and spices (10%). The consumption figure, however, does not include the usage of fresh herbs and vegetable material for seasoning, which is especially high in the more southern areas of the country.

More than 60 percent of the spices and herbs is sold in glass jars, followed by sachets (8%), plastic mills (6%), tubes (5%). The rest is packed in other packaging.

Figure 3.3 Market shares of spices and herbs in France, 2000
% of total consumption



Source: Editions RIA (2001)

France is renowned for its classical cuisine, where fresh ingredients and subtle seasonings are used. Thyme, rosemary and sage are often used to offset any fat content in the dishes. Pepper, nutmeg, cloves and ginger are used to enhance pork cuts ('charcuterie') as well as in slow-cooked stews and casseroles.
In the south, a mix of Mediterranean herbs, known as 'Herbes de Provence,' is often used in combination with garlic, while tarragon and saffron are often used in fish and chicken dishes.
France's relatively large foreign population (Africans, Arabs and Asians) and more French people travelling abroad have created a higher demand for ethnic food in France. Also, a busier life style has led to a growing demand for convenience foods, such as ready meals or cooking sauces. Small snacks ("petit plats") with a new or typical taste, which could be either French or exotic, have become popular. Examples of new exotic snacks or meals are Mexican guacamole and chilli, or Moroccan taboulé and tajine.

The French like to use innovative products or new spices and herbs, but these should be ready-to-use and practical. To save time, French people choose culinary aids in which all the ingredients they need for a dish, including herbs and spices, have already been added. New varieties of sauces, aromatic tablets, bottled marinades and spiced mustards (e.g. with tarragon and green peppers) have grown fast in popularity.
On the other hand, in many older French households they still prefer to compose their own recipes, thus giving French home cooking its flair and originality, in which the use of herbs and spices complements the flavour of the dish. Ready-to-use spice and herb mixtures have gained popularity and more varieties have been introduced in the French market. These were popular spice mixtures used in cooking the French 'pot au feu' (hotpot), Moroccan couscous, Italian ravioli and Spanish paëlla. Ready-to-use spices for Mexican and Asian dishes also became more popular.

France is the largest European market for culinary herbs and is also a major exporter, producing parsley, tarragon and thyme on a large scale. Basil, chervil, chives, coriander, rosemary, sage and dill are also grown commercially. The market for dried herbs, of which the most significant are mint, thyme, marjoram, sage, oregano, rosemary and basil, is estimated at about 7,200 tonnes. Parsley, bay leaves, chives, savoury, dill and chervil are also imported.

United Kingdom

The United Kingdom has a long tradition in spice trading with ex-colonies (primarily in South-East Asia). Total spice and herb consumption in the British retail sector was estimated at 1,960 tonnes or £ 93.2 million (€ 57.8 million) in 2001 (Euromonitor 2002).
The market is forecasted to grow further, reaching 2,310 tonnes or £ 104.1 million (€ 64.5 million) by 2005. The most popular herbs have traditionally been parsley, thyme, basil and marjoram but, because of the increasing immigrant population, consumers have become more interested in ethnic and foreign foods, with the result that the list of herbs and spices has expanded greatly.

In 2001, the fresh herb market in the United Kingdom was estimated at £ 23 million (€ 14.2 million), of which parsley, coriander, basil, mint and thyme accounted for the major part. The last few years, this market has grown as sales of value-added products increase and consumer purchasing habits change from generic items, such as curry powder, mixed herbs and salt, to specific herbs, such as oregano or basil.

As from the beginning of the 1990s, according to McCormick, there has been a major change in eating habits. Ready prepared meals and sauces were used more often and significantly more people began to eat out, especially in Indian and Chinese restaurants.
This led to a fast growing demand for convenience foods. British people also enjoy trying out foreign dishes and this has contributed to the growing demand for more variety in ready meals.

TV cookery programmes have stimulated more interest in learning about good food and authentic flavourings, and this has been reinforced by more travel abroad, health concerns and new restaurant trends. This in turn

has encouraged people to try new kinds of fresh and frozen ready meals and, having done so, to cook them at home, provided the ingredients (e.g. spices and herbs) are readily available. Interest in Thai, Mexican, Mediterranean and Moroccan cuisine has led to an increased demand for exotic spices and herbs, such as lemon grass, harissa, galangal and coriander leaf.

When time is short, consumers prefer convenience instead of "fiddling about" with individual spices and herbs. New product varieties are introduced with "built-in" spices and herbs, e.g. garlic-flavoured butter, canned tomatoes and cooking oils with herbs.
There are also new products such as Chinese, Indian, Italian and Mexican cubes of ready-made herb blends, which put pressure on the retail sales of dried herbs, spices, and curry powders, whereas spices are more in demand in the British industrial sector.

The organic food market in the United Kingdom has experienced very dynamic growth in recent years.
In 2000, retail sales valued over £600 million (€ 984 million). The major supermarkets have responded to consumer demand by stocking vastly increased ranges of organic foods. Apart from those used for some herbal teas and herbs for medical use, not many organic spices are sold yet.

Spain

In 1997, the Spanish consumption of spices and herbs per capita averaged 300 grams per year. Spain is a relatively large market for spices and is a major producer and processor of paprika powder and saffron.
Domestic usage of dried spices and herbs in Spain is not very high because Spanish cooks tend to use fresh produce for seasoning. The Spanish are rather conservative in their eating habits compared to other EU countries. Saffron is used to give the golden colour to Spanish paëlla rice, while paprika is used for spiced sausages ('chorizo'). Chillies, paprika and oregano are also traditional flavourings. Small snacks ('tapas') are served with drinks in local bars. There is enough choice already available for the Spanish and there seems to be no immediate need for new varieties.

In 2001, tourism brought almost 50 million foreigners into Spain; its immigrant population is growing, and in the future the ethnic mix is likely to be increasingly diverse, offering opportunities for spices and herbs in the ethnic segment.

The latest information available on the Spanish retail market for spices and herbs indicates that total sales reached US$ 44 million in 1997, of which 42 percent consisted of single spices, 35 percent of dried and fresh herbs, 18 percent of pepper and 5 percent of ready-to-use mixtures.

Demand for imports of culinary herbs is very small owing to the high level of local production, which satisfies practically all of the country's requirements for the major herbs used – thyme, rosemary, sage, marjoram and parsley.

3.2 Market segmentation

The popularity of herbs and spices vary considerably from region to region in the EU.
For example, the Mediterranean regions of southern France, Spain and Italy have a very low consumption of dried herbs, but use a lot of fresh material from gardens or wild produce harvested in the mountains. Many Mediterranean dishes use fresh vegetables rather than spices or herbs for flavouring.

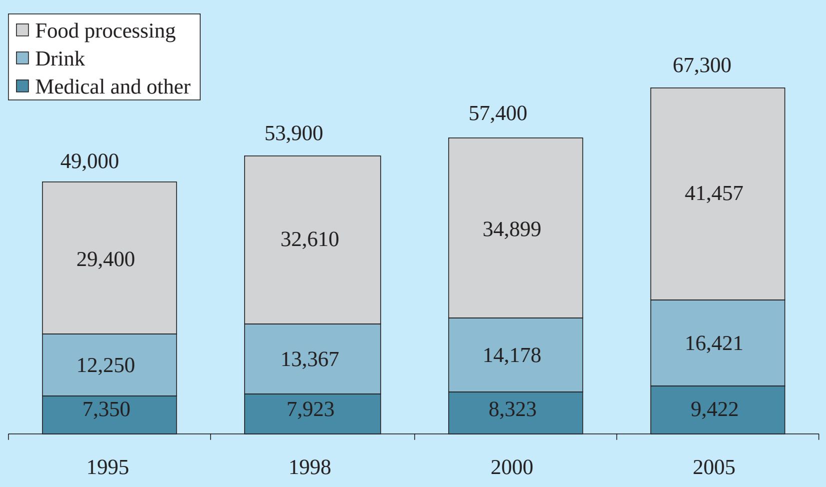
The spices used by the average consumer are still rather traditional, but new trends, such as those described in Section 3.3, have developed in certain markets, especially in Northern Europe and within more urban populations.

Recent years have seen a huge rise in the popularity of Far Eastern, Mediterranean and Mexican cuisine, particularly in Northern European markets.
This trend has been reflected in some movement in demand away from traditional spice and herb mixtures to new combinations and spice ingredients for use in the home, the ever-growing market for convenience foods and snacks and the fast food and restaurant trade. Examples are seen in the increased use of coriander and cumin, both of which have been adopted for many dishes other than curries. Chinese five-spice mix has also found favour in Germany and the United Kingdom.

The consumption of spices and herbs can be divided into three end-user segments: the industrial, the retail and the catering sector. In almost all EU countries the industrial sector consumes the largest proportion, accounting for 55-60 percent of the total usage of spices and herbs. The retail sector consumes 35-40 percent and the catering sector 10-15 percent.

Industrial sector
A clear shift can be observed away from household use of spices and herbs to industrial use. Spices are used particularly in the processing of meat, fish, canned products, sauces, soups, bakery goods and other prepared and convenience food. All these sectors have shown a significant expansion during the past few years. In most cases, the meat industry is by far the largest user of a wide range of spices. Other sectors, like the beverage industry, use anise, badian and juniper in alcoholic drinks and liqueurs and use ginger in soft drinks. Ginger is also used in biscuits and pickles. Pepper and mustard are used in most savoury products and sauces, while mint is used in confectionery.

Figure 3.4 EU market development in the consumption of spices and herbs by the industrial sector 1995-2005 tonnes



Source: Frost and Sullivan, October 1998

Industrial food-processing also includes spice mixing for meat factories, butchers, bakers and packers for the catering sector. Grinders and blenders tend to make more multi-functional mixes to be used especially in the baking and meat processing industries.
Although the industrial sector is a mature market, further growth is expected in the coming years, with a forecast of 67,300 tonnes in 2005.
The food-processing industry takes the largest proportion, as is shown in figure 3.4.

The meat industry
The meat industry introduced variations of pre-spiced meat, appropriate for particular seasons or popular foreign dishes (e.g. spiced barbecue in summer, along with shoarma or cajun meat flavours).
Specialist spice-mixing companies assist the meat and bakery trade by producing ready-to-use spice mixtures for meat, as well as for sausage factories and confectioners. They also produce consumer sachets of specific spice and herb mixtures, which are distributed by butchers' shops as point-of-sale material and more frequently in the supermarkets. Small sachets with spice mixtures are also packed together with various kinds of meat, and even with fish.

The food-processing industry
This industry buys spices, herbs and mixtures according to its own very specific recipes and quality requirements. The service provided by blending companies nowadays has been extended to the preparation of ingredients which include not only spices or herbs but also other items such as salt, garlic powder, lemon, dehydrated vegetables and other flavourings.

The major industrial users of (spice) mixtures include producers of snacks, soups, sauces, deep-freeze and oven-ready meals and catering products.
Since consumers now often stir-fry potatoes and vegetables instead of boiling them in the traditional way, the retail market for ready-to-use sauce mixes for these dishes has been a very fast growing segment. There are several sauce mixes for all kinds of foreign cuisines.

This segment is expected to grow further because these special mixtures exactly meet busy housekeepers' needs for convenience. They provide the variation people enjoy with their potatoes and vegetables, which can be baked or fried with a different flavour each time. Mixtures of herbs with dressings for salads, as well as mixtures with mayonnaise to bake potatoes in the oven, are also popular in the EU market.

The non-food industries
The consumption of spices in the non-food sector, in pharmaceuticals and perfumery, is still small and does not have any significant effect on overall demand. In these sectors, spices and herbs are mainly used for the production of essential oils and oleoresins, although production mostly takes place in the supplying countries. Essential oils and oleoresins are not only used in the food-processing industry, but are also important constituents in the flavouring and perfume industry. For more information, please refer to the EU Market Survey "Food Ingredients for Industrial Use."

In the pharmaceutical industry, mint is used in medicinal tablets and potions and capsicum (seeds) are used for thermo-plasters or for creams or gels against muscular pain. In general, alternative medicines using spices and

herbs have increased in popularity in most EU countries over the last few years. Children's medicine in particular is often designed to taste pleasant, so changes in taste may be an opportunity for further growth for the use of herbs and spices in medical applications.
Restaurants, hospitals and schools are some of the other end-users of spices, although the quantities consumed by these sectors are small.

Retail sector
Each individual country has its own speciality and the acceptance of exotic meals varies strongly. Consumers in some EU countries are more readily open to international cuisine, while others tend to prefer their own (rich) traditional cuisine.
Consumption of exotic Asian foods and their allied spices is high in the United Kingdom and The Netherlands because of the presence of sizeable immigrant populations and the many Chinese, Indian, Indonesian and Thai restaurants visited by a growing number of people. The major EU retail markets are Germany, France, United Kingdom, Spain and Italy, because of their large population sizes.

The consumers of spices and herbs can be divided into five segments:

Lazy diners – who enjoy a wide variety of cuisines, eat out a lot, use ready-prepared food at home and who probably work full time. They are typically between the ages of 16 and 40 years old. This group has grown fast in the past few years.

Traditional – those who cook traditional plain food for the family, use recipe books, watch TV food programmes, look for new twists to old favourites, choose branded goods and are brand loyal. This category has decreased over the past few years.

Lazy traditional – they are similar to those classed as traditional, but cook through necessity. The family members rarely eat together and they eat more convenience foods. This group is likely to grow in number.

Exotic – this group loves cooking and experimenting; they follow new trends and seek out new products and inspiration in stores. They enjoy a wide variety of cuisines, often combined with entertainment and healthy eating. They are typically between the ages of 30 and 39 years old. Their most popular dishes are Asian (Indonesian, Indian, and Thai). This group is likely to grow in number.

Experimental – this group enjoy food generally and seek new cuisines and experiences. They enjoy ethnic cooking, follow the latest trends, often eat out and express an interest in healthy eating.

The exotic and experimental consumers are the innovators in eating and cooking habits, a trend which is likely be followed by the other groups.

Catering sector
The amount of spices used by the catering sector is relatively small but is now growing, reflecting the growing social trend for more consumption of meals outside the home. The higher proportion of working women (and hence double-earning households), single person households and the reluctance of people to spend much time preparing meals are all factors stimulating higher consumption of meals in canteens, fast food outlets and restaurants and also of take-away foods.

3.3 Consumption patterns and trends

The population in Western Europe is still growing and will continue to grow until about 20 years from now. It is estimated that, thereafter, Western Europe will start to show a declining population size. However, already now the composition of the population is changing. There is a rapidly growing proportion of elderly people combined with a decreasing proportion of young people. We also see a family 'dilution'; family households are getting smaller because people are having fewer children. The number of single households in Western Europe is substantial and still increasing, making these people a highly significant consumer group for food suppliers. Moreover, the increasing ethnic groups (from Turkey, Morocco, Asia, Eastern Europe) strongly influence the demand for food and food products.

Thanks to increased prosperity in the EU, eating behaviour is related to income and life style.
Despite this increase in prosperity, the food market in the EU is highly competitive, since consumers are not going to eat more, but will only, at the very most, switch to other products.

Recent research into consumer behaviour shows that today's consumer has the following preferences concerning food and nutrition in general, and spices and herbs in particular:

Convenience
European people (including women) are working more and more in jobs outside their home and have busy social lives. Moreover, the number of single households increases. As a result, less time is left for the preparation of a full meal. Therefore, West European consumers have a growing need for convenience meals, spurring the demand for peeled potatoes, canned soup, preserved vegetables, prefried fries, fish sticks, pizza, frozen pastry, ready meals (frozen, chilled or shelf-stable). Food industry promotion of spice mixtures and ready-to-use sauce mixes has made preparation simple and quick. Consumers do not have to purchase or even

be familiar with the individual spices required for a particular dish, nor is there lengthy preparation time involved.

More variety and ethnic foods
Interest in a wide range of international and ethnic dishes has been stimulated in recent years by extensive foreign travel, the establishment of many different ethnic restaurants, the influence of the immigrant population and promotion both by the media and the food industry.

Holidays to exotic destinations have influenced cooking. Younger people especially have become more open-minded towards less familiar flavours and tastes. This has stimulated growth in the number and variety of ethnic restaurants. Indonesian, Chinese, French and Italian restaurants have a long-established place in The Netherlands. Other national cuisines which have gained popularity in recent years are Greek, Thai, Indian, Mexican and regional Chinese.

The food industry has been very active in promoting an interest in exotic foods as a promising growth sector, which can boost their overall sales. Advertising and media promotion of the cuisine of other regions of the world by means of television cookery programmes, women's magazines and leaflets and publications distributed by manufactures and supermarket chains have also stimulated demand. A growing number of supermarkets has a special area of shelf space devoted to authentic ethnic products, which are quick and easy to prepare. Several ethnic groups have their own food shops (Indonesian, Turkish, Moroccan) with their own national products, where gradually also the European consumer has found his/her way. These developments have stimulated a wider range of consumers to make exotic dishes at home on special occasions e.g. when having friends over for dinner.

'Grazing'
The modern consumer does not confine himself to the traditional three meals a day (breakfast, lunch and dinner), but is eating smaller bites at more frequent intervals: ready-to-eat products or products requiring very little ultimate preparation: take-out foods, hamburgers, mini-pizzas, instant soups, filled croissants, candy bars, muesli bars, cheese sticks and fruit yoghurts. Restaurant quality is becoming the benchmark for the growing ranges of added-value prepared food offerings.

Organic food
Since European consumers have recently experienced several food scares, many people are concerned about the safety of food, as well as the effects of intensive farming on the countryside and on the environment in general. These factors, combined with the increasing awareness of the importance of diet and nutrition, have intensified interest in organic foods, which are grown according to principles laid down in Directive EC 2092/91 (see Section 1.1.1 of the EU Strategic Marketing Guide "Spices and Herbs").

Simply said, it means that products are grown without the use of artificial (chemical) fertilisers and pesticides. The demand for organic food is booming in several EU member countries. This can offer interesting market opportunities for exporters in developing countries, where often the major part of agricultural produce is anyway organic although not certified ('organic by default'). Certification by a EU accredited certifying body (including regular inspections) is necessary. However, organic spices and herbs still only account for a small share of the spice and herb consumption, although the organic market is growing.

More information on the above can be found in CBI's EU Market Survey "Organic Food Products".

Health food
Health foods, which are thought to make a positive contribution to good health and which are not harmful to the environment, are growing in importance.
The rising demand for foods low in sugar and salt has motivated the development of specific spice and herb mixes as alternative flavours. Food manufacturers are using herbs as natural preservatives and anti-oxidants (for instance, oregano and rosemary are used extensively as anti-oxidants in sausages and other meat products). Herbal drinks (herbal tea, alcoholic drinks and soft drinks) are also becoming increasingly popular.

In general, there is a noticeable move away from artificial flavourings and colourings, and essential oils, oleoresins and extracts are growing in importance in the industrial seasonings sector.

Environment-consciousness
Food production, especially primary growing, should be environment-friendly (organic, see above).
Waste, including packaging waste, should be avoided or at least reduced. In the scope of the increasing environment consciousness in the EU, a group of leading European food retailers launched the EurepGap Protocol in 1999. The objective of EurepGap (Euro-Retailer Produce Working Group for Good Agricultural Practice) is to raise standards for the production of fresh produce by promoting food safety, sustainable use of natural resources and more environment-friendly production.
For more information on the Eurep Group and EurepGap Protocol, please refer to *www.eurep.org*

4 PRODUCTION

Few spices are produced in the EU. According to FAO (2002), total EU production of spices amounted to 15,110 tonnes in 2001, of which 76 percent consisted of pimento, 7 percent of anise/badian/fennel and 17 percent of other spices.
Spain produced 11.2 thousand tonnes of pimento and 400 tonnes of anise/badian/fennel. Spain is also a major producer and processor of saffron.

Table 4.1 EU production of spices, 1999-2001 tonnes

	1999	2000	2001
Pimento & allspice			
• Greece	300	300	300
• Spain	11,200	11,200	11,200
Anise, badian & fennel			
• Denmark	41	40	40
• Greece	470	470	470
• The Netherlands	200	200	200
• Spain	400	400	400
Other spices			
• Spain	2,500	2,500	2,500
Total EU spice production	**15,111**	**15,110**	**15,110**

Source: FAO (2002)

The most commonly grown herbs in EU countries are: basil, bay leaves, celery leaves, chives, coriander, dill tips, chervil, juniper, marjoram, oregano, parsley, rosemary, sage, savoury, tarragon, thyme and water cress. France, Italy and Greece are important producers of dried herbs.

5 IMPORTS

5.1 Total imports

As mentioned earlier, the spices and herbs discussed in this chapter and in chapter 6 will follow the HS categories, specified under the following HC codes 0904, 0905, 0906, 0907, 0908, 0909 and 0910.
After an increase by 4 percent in the imported value between 1998 and 1999, imports of spices and herbs by EU member countries decreased by 4 percent in value, amounting to US$ 786 million in 2000. In terms of volume, imports amounted to 261 thousand tonnes in 2000, representing an increase by 5 percent since 1998.

It should be noted that, although the US$ is the basic currency unit used to indicate the imported values, Eurostat trade statistics are expressed in € and transferred into US$. Hence the developments in the imported values are also influenced by the € / US$ exchange rate. So, while the imported value remained stable in terms of US$, it increased in terms of €.
For more information about the exchange rate, please refer to Chapter 2 of this survey.

Please also refer to Appendix 2 for detailed trade statistics (including the € values) of the EU and of the major national trade markets within the EU.

In 2000, Germany was the leading EU importer of spices and herbs, accounting for 23 percent of the total imported value by EU member countries, followed by The Netherlands (21%), France (13%), the United Kingdom (12%) and Spain (8%).
It should be noted, however, that most of the imports have been re-imported from other EU member countries or will be re-exported to other EU member countries or to countries outside the EU.

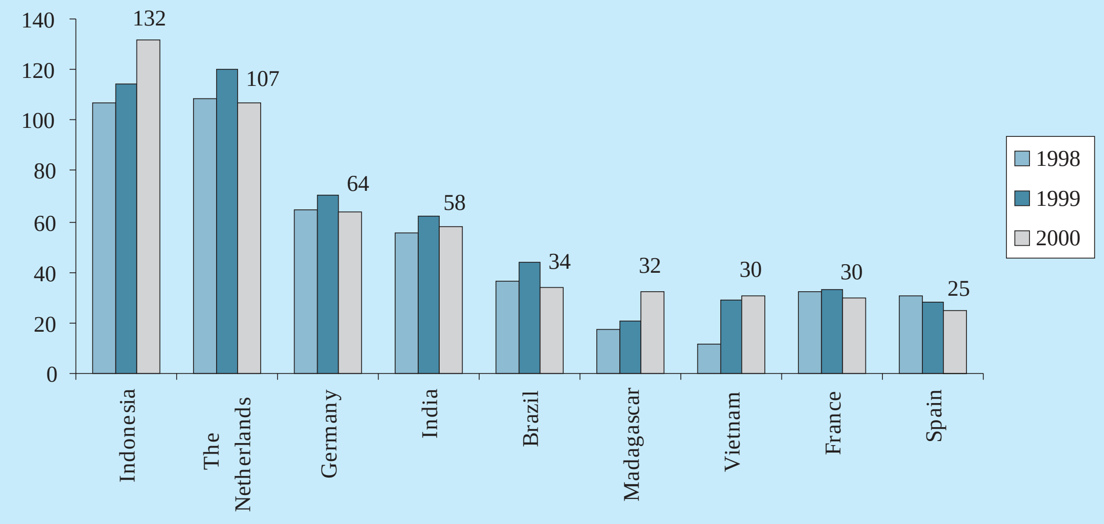
Indonesia, The Netherlands and Germany were the leading supplying countries, together accounting for nearly 40 percent of the total imported value in 2000. Please note, however, that the reason why The Netherlands and Germany are high on the supplier list is that they re-export large amounts of their imports.

Table 5.1 Imports of spices and herbs by EU member countries, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	786,689	247,946	814,794	768,674	255,737	786,096	854,452	260,759
Extra-EU	497,458	175,589	512,574	483,560	173,257	508,757	552,997	175,580
Germany	191,349	56,051	201,742	190,323	59,742	180,114	195,776	58,531
The Netherlands	144,675	51,215	173,056	163,260	57,101	164,467	178,769	60,023
France	96,995	24,312	97,767	92,233	25,006	100,059	108,760	24,861
United Kingdom	93,974	39,744	88,946	83,911	37,874	96,133	104,492	41,712
Spain	76,668	30,474	67,284	63,475	25,800	62,444	67,874	20,813
Belgium	n.a.	n.a.	42,718	40,300	10,962	40,173	43,666	11,551
Italy	40,408	8,166	40,349	38,065	9,236	38,597	41,953	9,502
Austria	25,944	8,521	25,222	23,794	9,284	25,640	27,870	10,198
Sweden	21,934	4,972	23,163	21,852	5,138	24,457	26,584	5,471
Denmark	18,302	5,196	21,680	20,453	5,483	18,228	19,813	5,444
Finland	8,429	1,997	8,422	7,945	1,834	9,915	10,777	1,988
Ireland	7,825	1,466	8,758	8,262	2,377	8,403	9,134	2,576
Greece	8,998	2,702	7,268	6,857	3,706	8,321	9,045	5,458
Portugal	7,749	2,223	6,231	5,878	1,894	6,938	7,541	2,319
Luxembourg	n.a.	n.a.	2,207	2,082	300	2,206	2,398	312
Belgium & Luxembourg	43,473	10,907	–	–	–	–	–	–

n.a. not available
For year 1998, figures for Belgium and Luxembourg are not separately available.
Source: Eurostat (2001)

Figure 5.1 The leading suppliers of spices and herbs to the EU, 1998-2000 US$ million



Source: Eurostat (2001)

Spices and herbs were mainly supplied by non-EU countries. In 2000, 65 percent of imports (in value) by EU member states was supplied by non-EU countries, of which 91 percent originated in developing countries.

Organic spices and herbs
Spices and herbs cover a very wide group of products. Sales of individual ethnic spices and ethnic blends are increasing across the board. Individually, there has been a strong upswing in sales of organic cardamom and cloves. Organic importers are always on the look out for new reliable suppliers of certified organic spices and herbs. At the time of research, a leading organic importer of spices and herbs in The Netherlands was looking for cardamom, mace, nutmeg and white pepper. Another leading importer of food ingredients was looking for cardamom, ginger and lemongrass. African, Latin American and Asian countries are supplying organic spices and herbs to the European Union. Egypt is a leading supplier, substantial production also takes place in Tanzania, Malawi, Sri Lanka, Peru, Ecuador, Argentina, Brazil and India. There are many other developing countries producing spices and herbs.

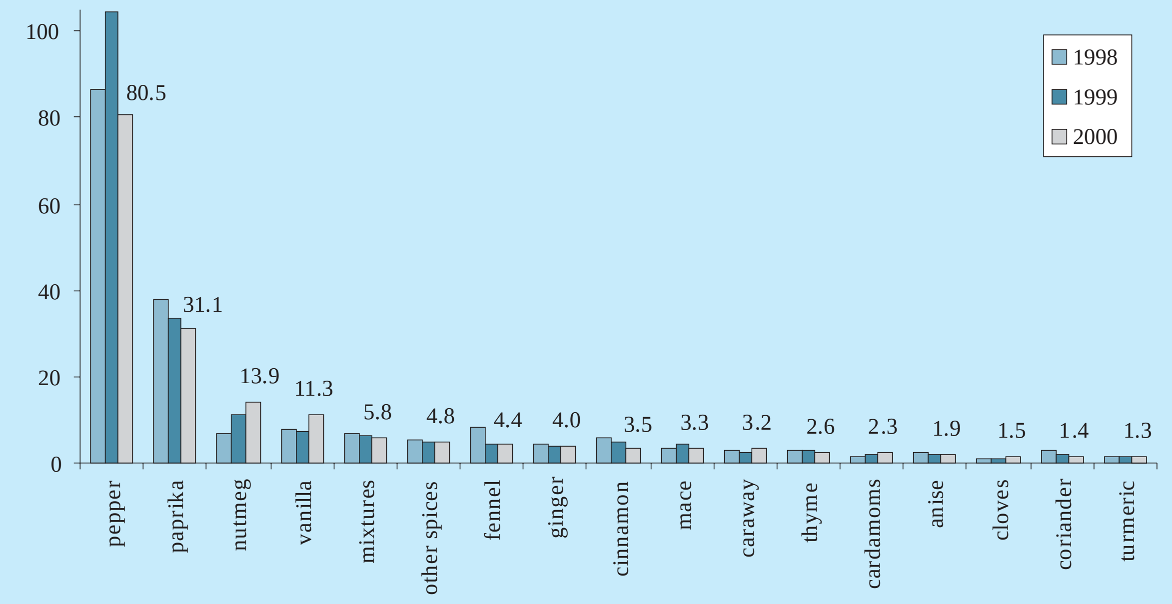
For more information on organic spices and herbs and other organic food products, please refer to CBI's EU Market Survey "Organic Food Products."

Germany
In 2000, Germany was the leading EU importer of spices and herbs, with imports amounting to US$ 180 million or 59 thousand tonnes.
After increasing by 5 percent in value and by 7 percent in volume between 1998 and 1999, German imports of herbs and spices decreased by 11 percent in value and by 2 percent in volume between 1999 and 2000. These developments were mainly caused by the fluctuations in the German imports of pepper.
In 2000, Germany was the leading EU importer (in terms of value) of pepper, paprika, fennel, caraway, thyme/bay and anise/badian seed.

Between 1998 and 2000, the values of the following products imported into Germany increased considerably in terms of value: nutmeg, vanilla, cardamom, cloves and cumin. Cumin, saffron and curry, none of which are displayed in Figure 5.2, together accounted for less than 2 percent of total German imports (in value) in 2000.

In 2000, about 65 percent of the imported products (in terms of value) was supplied by non-EU countries, of which 88 percent by developing countries.
Although The Netherlands was the leading supplier to Germany for most spices and herbs, this almost entirely consisted of re-exports that initially passed through The Netherlands.

Figure 5.2 Imports of spices and herbs into Germany, 1998-2000 in US$ million



Source: Eurostat (2001)

The leading suppliers of spices and herbs to Germany (share of the imported value in 2000)		share DC
pepper	The Netherlands (35%), Indonesia (31%), Brazil (11%), Vietnam (7%), Malaysia (5%)	61%
paprika	Brazil (22%), China (16%), Turkey (11%), Hungary (10%), Spain (10%), Israel (8%)	59%
vanilla	Madagascar (79%), Comoros (6%), France (5%), Indonesia (4%), USA (2%)	91%
cinnamon	The Netherlands (46%), Indonesia (20%), Sri Lanka (20%), Vietnam (4%), China (2%)	50%
cloves	The Netherlands (35%), Madagascar (29%), Comoros (14%), Indonesia (7%)	59%
nutmeg	The Netherlands (59%), Grenada (24%), Indonesia (12%), UK (3%), Sri Lanka (1%)	37%
mace	The Netherlands (45%), Grenada (30%), Indonesia (16%), Switzerland (3%)	49%
cardamoms	Guatemala (57%), The Netherlands (29%), Papua New Guinea (4%), India (3%)	66%
anise	Turkey (54%), China (9%), Vietnam (9%), Hungary (7%), The Netherlands (7%)	77%
coriander	The Netherlands (22%), Hungary (19%), Egypt (19%), Bulgaria (14%), Romania (6%)	26%
cumin	Turkey (40%), Syria (15%), The Netherlands (13%), Czech Rep. (10%), India (8%)	68%
caraway	The Netherlands (26%), Poland (22%), Turkey (10%), Syria (8%), Finland (6%)	25%
fennel	China (27%), Yugoslavia Fed. Rep. (15%), Bulgaria (14%), Hungary (9%)	64%
ginger	The Netherlands (39%), China (32%), Thailand (7%), Tanzania (4%), Nigeria (3%)	52%
saffron	Iran (41%), Spain (39%), Italy (6%), France (5%), Greece (3%)	42%
turmeric	India (59%), The Netherlands (26%), Indonesia (3%), China (3%), France (2%)	71%
thyme/bay	Turkey (39%), Poland (35%), Belgium (8%), Spain (4%), Albania (3%)	44%
curry	UK (44%), India (22%), The Netherlands (14%), Thailand (7%), Sri Lanka (6%)	36%
mixtures	The Netherlands (46%), France (18%), USA (5%), Austria (4%), Turkey (4%)	10%
other spices	The Netherlands (25%), UK (14%), France (10%), Guatemala (8%), Turkey (7%)	30%
spices & herbs	**The Netherlands (28%), Indonesia (16%), Brazil (9%), Madagascar (5%), China (5%)**	**57%**

DC: Developing Countries

The Netherlands

Although by itself a small consumer of spices and herbs in comparison with its neighbour countries, The Netherlands is an important intermediary in the global trade of spices and has a long tradition in this field. Large quantities are imported by Netherlands traders for cleansing, reconditioning, blending and mixing to the specifications of different end-users.
In 2000, The Netherlands was the second leading EU importer of spices and herbs, accounting for 21 percent of total imports (in value) by EU member countries.
A large part of the imports is re-exported to Germany, which implies that not Germany, but The Netherlands actually is the leading EU importer of spices and herbs.

In the same year, Netherlands imports of spices and herbs amounted to US$ 164 million or 60 thousand tonnes, representing an increase of 14 percent in value and of 17 percent in volume since 1998.

Between 1998 and 2000, imports of nutmeg, other spices, cumin, cloves and cardamom showed the largest relative increases in terms of value. Thyme/bay, fennel, curry and saffron, none of which are displayed in Figure 5.3, together represented less than 1 percent of the total imported value of spices and herbs.

In 2000, non-EU countries supplied 87 percent of the imported value of spices and herbs, which came almost entirely from developing countries.

Figure 5.3 Imports of spices and herbs into The Netherlands, 1998-2000, in US$ million

Source: Eurostat (2001)

The leading suppliers of spices and herbs to The Netherlands (share of the imported value in 2000)		share DC
pepper	Indonesia (56%), Vietnam (18%), India (11%), Brazil (7%), Malaysia (3%)	97%
paprika	Mexico (21%), Spain (16%), Jamaica (11%), Germany (8%), Hungary (8%)	54%
vanilla	France (28%), Belgium (24%), Germany (18%), UK (17%), Tanzania (11%)	13%
cinnamon	Indonesia (80%), Vietnam (9%), Sri Lanka (7%), Germany (1%)	97%
cloves	Comoros (56%), Madagascar (24%), Indonesia (14%), Tanzania (3%)	97%
nutmeg	Indonesia (79%), Grenada 15%), Singapore (2%), Germany (1%)	96%
mace	Indonesia (88%), Grenada (7%), Singapore (1%), Italy (1%)	97%
cardamoms	Guatemala (74%), Indonesia (9%), UK (5%), Honduras (4%), India (2%)	91%
anise	Turkey (39%), Vietnam (33%), Syria (13%), China (7%), UK (4%)	93%
coriander	Russia (25%), Hungary (13%), Germany (10%), Romania (9%), Ukraine (9%)	14%
cumin	Syria (48%), United Arab Emirates (15%), China (12%), Iran (8%), Ethiopia (3%)	75%
caraway	Canada (58%), Denmark (10%), Germany (5%), Finland (4%)	0%
fennel	Bulgaria (14%), Germany (12%), Syria (10%), Egypt (4%), India (3%)	16%
ginger	Thailand (26%), Brazil (24%), China (17%), Nigeria (15%), South Africa (4%)	94%
saffron	Spain (55%), UK (12%), Belgium (10%), France (9%), Iran (8%), Germany (7%)	8%
turmeric	India (87%), UK (2%), Germany (2%), Singapore (2%), Pakistan (2%)	92%
thyme/bay	Turkey (39%), Israel (22%), Spain (11%), Germany (9%), Belgium (9%), Poland (4%)	43%
curry	India (33%), Germany (29%), Sri Lanka (20%), UK (12%), Belgium (2%)	55%
mixtures	Germany (67%), Belgium (9%), Italy (5%), UK (4%), France (2%)	7%
other spices	Germany (58%), Thailand (9%), Israel (9%), France (8%), Austria (5%), India (2%)	15%
spices & herbs	**Indonesia (44%), Vietnam (9%), India (7%), Germany (7%), Brazil (5%), Grenada (2%)**	**83%**

DC: Developing Countries

France

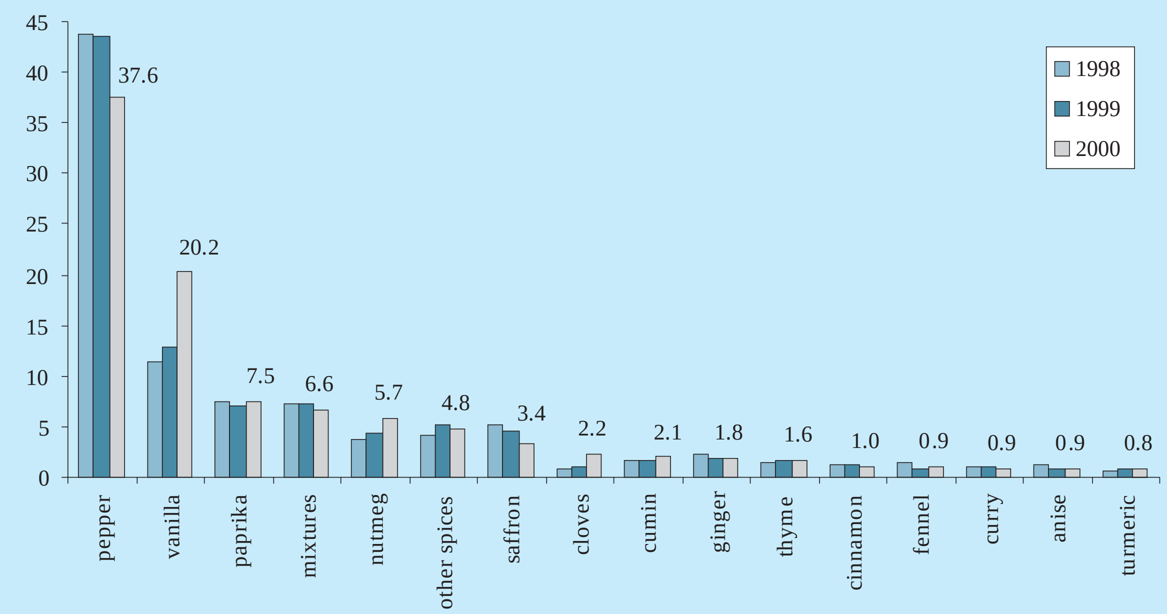
France was the third leading EU importer of spices and herbs. Between 1998 and 2000, imports of spices and herbs into France remained fairly stable in both terms of value and volume, amounting to US$ 100 million or 25 thousand tonnes in 2000.

Between 1998 and 2000, France increased its value imports of vanilla, nutmeg and cloves considerably in relative terms.

Over the same period of time, the leading imported product, pepper, decreased by 14 percent in value. The smallest imported products were cardamom, mace, coriander and caraway, together representing a share of 2 percent of total French spice and herb imports (in value).

In 2000, about two thirds of the imported value of spices and herbs into France were supplied by non-EU countries, of which more than 90 percent by developing countries.

Figure 5.4 Imports of spices and herbs into France, 1998-2000, in US$ million



Source: Eurostat (2001)

The leading suppliers of spices and herbs to France (share of the imported value in 2000)		share DC
pepper	Indonesia (27%), Germany (12%), The Netherlands (11%), Brazil (11%), Vietnam (10%)	66%
paprika	Spain (40%), Germany (15%), Belgium (7%), India (7%), UK (4%)	24%
vanilla	Madagascar (63%), UK (12%), Comoros (10%), Canada (5%), Germany (5%)	75%
cinnamon	Indonesia (22%), China (16%), Sri Lanka (13%), Belgium (13%)	61%
cloves	Madagascar (43%), Sri Lanka (23%), Comoros (10%), The Netherlands (5%)	81%
nutmeg	Grenada (37%), Indonesia (20%), Belgium (14%), The Netherlands (12%), Italy (8%)	59%
mace	Indonesia (58%), Belgium (22%), Grenada (8%), Germany (4%), Switzerland (3%)	67%
cardamoms	Guatemala (43%), UK (17%), Belgium (16%), India (8%), Germany (7%)	56%
anise	China (24%), Vietnam (20%), Syria (16%), Turkey (16%), Germany (7%)	78%
coriander	Lithuania (17%), Germany (16%), Australia (14%), The Netherlands (11%), UK (9%)	11%
cumin	Syria (37%), Turkey (26%), The Netherlands (16%), Belgium (5%), Germany (5%)	71%
caraway	Egypt (33%), Spain (27%), The Netherlands (23%), Turkey (12%), Germany (3%)	46%
fennel	Chile (23%), Germany (19%), Macedonia (16%), Yugoslavia Fed. Rep. (10%)	61%
ginger	The Netherlands (28%), Thailand (15%), UK (13%), South Africa (10%), China (9%)	49%
saffron	Iran (74%), Spain (10%), Greece (6%), India (3%), Belgium (2%)	78%
turmeric	India (74%), Madagascar (12%), Germany (6%), The Netherlands (4%), UK (3%)	87%
thyme/bay	Poland (35%), Turkey (21%), Morocco (12%), Germany (10%), Spain (7%)	39%
curry	UK (31%), Germany (21%), Sri Lanka (19%), India (15%), Belgium (5%)	40%
mixtures	Tunisia (50%), Germany (23%), Belgium (16%), The Netherlands (6%)	51%
other spices	Germany (30%), Italy (20%), The Netherlands (9%), Belgium (7%), Spain (5%)	20%
spices & herbs	**Madagascar (16%), Indonesia (12%), Germany (11%), The Netherlands (7%), India (5%)**	**61%**

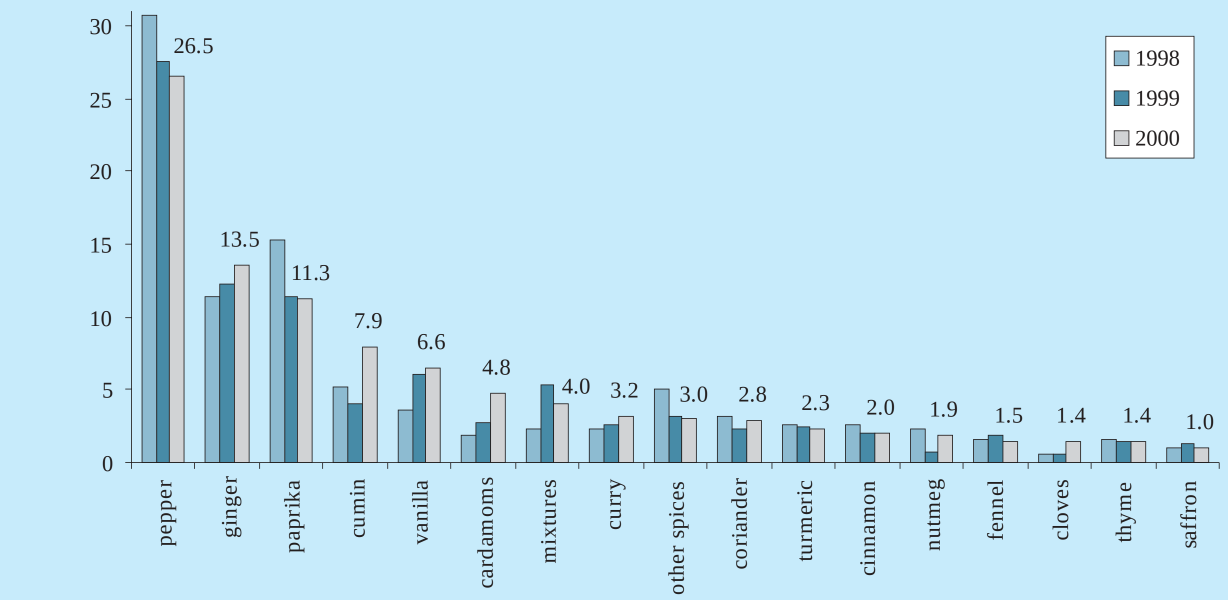
DC: Developing Countries

United Kingdom

After a 5 percent decrease in both value and volume between 1998 and 1999, imports of spices and herbs into the United Kingdom increased thereafter by 8 percent in value and by 10 percent in volume, amounting to US$ 96 or 42 thousand tonnes in 2000.

The United Kingdom dominates EU imports of ginger, accounting for 43 percent of total EU imports (in value) of this spice in 2000. This reflects the significant effect the large communities from India, Pakistan and Bangladesh have on sales of ginger in the United Kingdom. Because of the traditional popularity of Indian cuisine, the United Kingdom is also the largest EU importer of cumin seed, cardamoms, curry, coriander and turmeric. Mace, anise and caraway were the smallest groups imported into the United Kingdom, together accounting for just over 1 percent of the total imported value of spices and herbs in 2000. Except for paprika imports, the imported values of all leading product groups increased considerably between 1998 and 2000. In 2000, 70 percent of the imported products was supplied by non-EU countries, of which 86 percent by developing countries.

Figure 5.5 Imports of spices and herbs into the United Kingdom, 1998-2000, in US$ million



Source: Eurostat (2001)

The leading suppliers of spices and herbs to the United Kingdom (share of the imported value in 2000)		**share DC**
pepper	The Netherlands (30%), India (25%), Malaysia (10%), Indonesia (7%), Singapore (6%)	49%
paprika	Spain (23%), India (21%), USA (19%), Turkey (7%), Germany (6%), Jamaica (5%)	45%
vanilla	Madagascar (61%), Uganda (8%), Germany (7%), Comoros (7%), France (6%)	80%
cinnamon	The Netherlands (26%), China (20%), Germany (14%), Sri Lanka (13%), Seychelles (8%)	52%
cloves	Madagascar (36%), Sri Lanka (285), France 913%), The Netherlands (10%)	77%
nutmeg	The Netherlands (82%), India (6%), Grenada (3%), Sri Lanka (3%), St. Vincent (2%)	14%
mace	The Netherlands (86%), Grenada (12%), Sri Lanka (1%)	14%
cardamoms	Guatemala (66%), India (14%), Colombia (7%), The Netherlands (6%), USA (3%)	90%
anise	China (57%), The Netherlands (16%), Turkey (13%), Vietnam (3%)	77%
coriander	India (33%), Germany (14%), Bulgaria (12%), The Netherlands (9%), Romania (6%)	46%
cumin	India (48%), Syria (14%), Turkey (11%), Iran (11%), The Netherlands (4%)	89%
caraway	The Netherlands (53%), India (24%), France (12%), Germany 97%), Italy (3%)	26%
fennel	Germany (46%), India (27%), Egypt (13%), Italy (9%), The Netherlands (1%)	41%
ginger	Thailand (33%), Brazil (17%), Spain (13%), China (12%), India (5%), Australia (4%)	74%
saffron	Spain (69%), Italy (8%), United Arab Emirates (8%), India (6%), Iran (3%)	9%
turmeric	India (91%), The Netherlands (5%), Ireland (2%), Sri Lanka (1%)	93%
thyme/bay	Turkey (38%), Spain (25%), Belgium (14%), The Netherlands (6%), Germany (6%)	41%
curry	India (66%), Pakistan (9%), Thailand (6%), Sri Lanka (5%), Canada (3%)	89%
mixtures	Germany (23%), USA (21%), India (15%), Ireland (9%), China (7%), Spain (5%)	32%
other spices	India (19%), The Netherlands (14%), Thailand (13%), Israel (11%), China (9%)	52%
spices & herbs	**India (22%), The Netherlands (14%), Spain (7%), Germany (6%), Thailand (5%), Madagascar (5%)**	**60%**

DC: Developing Countries

Spain

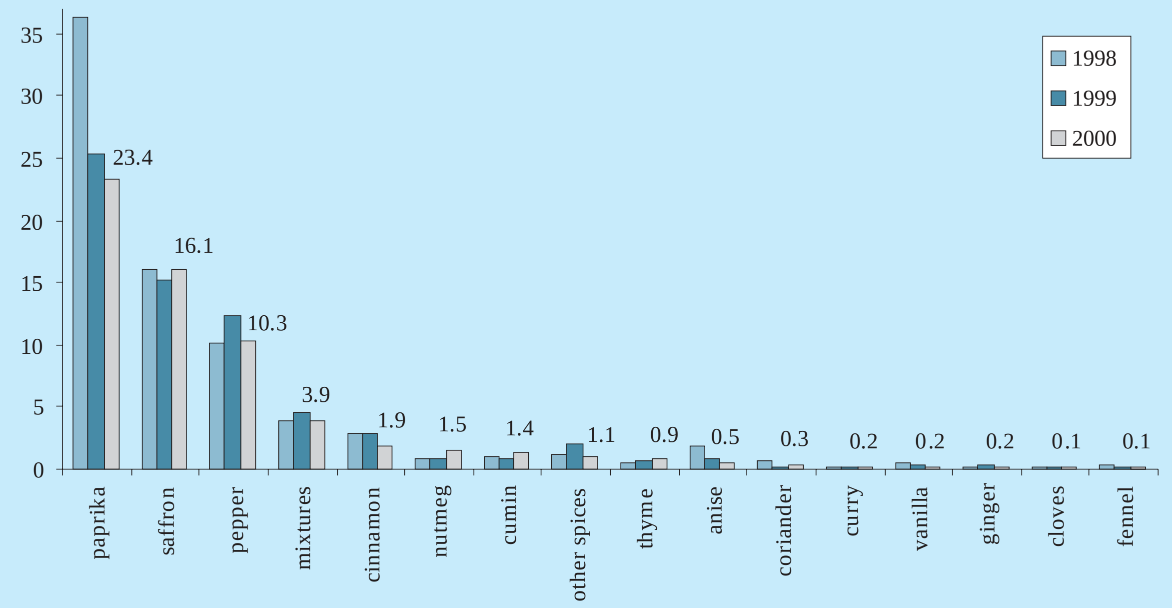
Spain ranks among the leading EU importers of spices and herbs, although imports decreased substantially between 1998 and 2000. In 2000, imports amounted to US$ 62 million or 21 thousand tonnes, representing a decrease of 19 percent in value and of 32 percent in volume since 1998.

Besides being a major producer of saffron, Spain is also the leading EU importer as well as leading (re-)exporter of this spice, although the traded volumes of this highly expensive product seem insignificant.

Between 1998 and 2000, the largest increases occurred in the imported values of nutmeg, cumin and thyme/bay. Cardamom, turmeric, mace and caraway were only small import products, together accounting for less than 1 percent of the total imported value of spices and herbs into Spain.

About 80 percent of the Spanish imported value of spices and herbs in 2000 was supplied by non-EU countries, of which 95 percent by developing countries.

Figure 5.6 Imports of spices and herbs into Spain, 1998-2000, in US$ million



Source: Eurostat (2001)

The leading suppliers of spices and herbs to Spain (share of the imported value in 2000)		share DC
pepper	Germany (18%), Malaysia (17%), Indonesia (16%), Singapore (10%), Vietnam (7%)	57%
paprika	Zimbabwe (43%), Peru (21%), South Africa (19%), Morocco (5%), Zambia (3%)	96%
vanilla	France (66%), Germany (18%), Belgium (12%), Mexico (2%)	2%
cinnamon	Sri Lanka (85%), France (5%), Madagascar (3%), Indonesia (3%), Germany (2%)	93%
cloves	Madagascar (67%), India (14%), Belgium (6%), Indonesia (6%), The Netherlands (5%)	87%
nutmeg	The Netherlands (32%), Indonesia (23%), Belgium (22%), France (19%), Germany (3%)	24%
mace	The Netherlands (66%), Indonesia (25%), Germany (9%)	25%
cardamoms	Germany (71%), India (23%), Belgium (5%), UK (1%)	23%
anise	Turkey (37%), Vietnam (32%), Syria (11%), Belgium (8%), Egypt (4%)	86%
coriander	Canada (84%), Bulgaria (6%), Germany (4%), The Netherlands (4%), India (1%)	1%
cumin	Turkey (33%), India (25%), Syria (21%), Iran (10%), France (5%)	94%
caraway	Egypt (95%), The Netherlands (5%)	95%
fennel	Egypt (35%), Yugoslavia Fed. Rep. (23%), Bulgaria (20%), Turkey (16%)	75%
ginger	The Netherlands (59%), France (23%), Germany (3%), UK (3%), India (3%)	7%
saffron	Iran (90%), Greece (9%), United Arab Emirates (1%)	90%
turmeric	India (63%), Peru (27%), Belgium (11%), France (1%)	89%
thyme/bay	Poland (51%), France (26%), Albania (9%), Morocco (8%), Turkey (2%)	20%
curry	India (58%), UK (18%), France (13%), Thailand (7%), Germany (1%)	66%
mixtures	France (95%), Germany (4%), UK (1%)	0%
other spices	Germany (27%), UK (24%), France (20%), Morocco (9%), India (5%)	19%
spices & herbs	**Iran (23%), Zimbabwe (16%), France (9%), Peru (8%), South Africa (7%), Germany (4%)**	**76%**

DC: Developing Countries

5.2 Imports by product group

As already mentioned, total imports of spices and herbs by EU member counties amounted to US$ 786 million or 261 thousand tonnes in 2000. Pepper and paprika were, by far, the leading product groups imported by EU member countries in 2000, in both terms of value and volume. As can be seen in Table 5.2, the value/ volume ratio for spices and herbs fluctuates considerably between the products, with vanilla, nutmeg, mace, cardamoms and saffron being relatively the most valuable spices.

Figure 5.7 shows an overview of EU imports and developments in terms of value, over the last three years, of spices and herbs falling under the broad-based product groups indicated in Section 1.1.

Please refer to Appendix 1 for detailed trade data for these product groups. The most eye-catching fluctuations are in the imported values of pepper, nutmeg, vanilla, cardamoms, cumin, cloves and fennel.

The specific spice and herb products are analysed in more detail below. Please keep in mind, however, that almost all the spice and herb imports are originally sourced outside the EU (mainly developing countries), but in many cases reach their final destinations through one (or several) EU member country (countries).

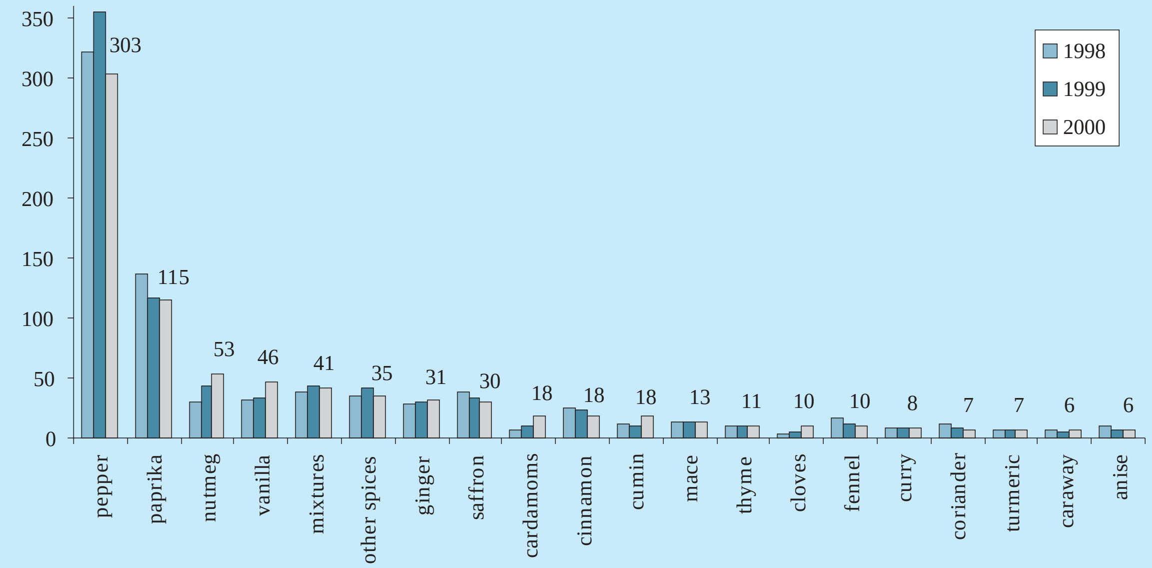
So in cases where it is reported that supplying countries are EU member countries, this mainly represents re-exports or transit export.

Table 5.2 Imports of spices and herbs by EU member countries, by product group, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total spices & herbs	786,689	247,946	814,794	768,674	255,737	786,096	854,452	260,759
Extra-EU	497,458	175,589	512,574	483,560	173,257	508,757	552,997	175,580
pepper	321,857	58,565	355,201	335,095	69,179	302,637	328,953	67,944
paprika	136,759	60,460	116,204	109,626	55,782	115,109	125,119	53,191
nutmeg	29,734	8,691	43,291	40,841	8,959	53,215	57,842	8,670
vanilla	30,918	1,743	33,163	31,286	1,898	46,006	50,007	1,847
mixtures	38,378	10,611	43,817	41,337	13,564	40,916	44,474	14,288
other spices	35,211	11,854	41,132	38,804	14,232	34,750	37,772	15,049
ginger	28,529	21,326	29,589	27,914	21,060	31,369	34,097	24,540
saffron	37,589	181	33,438	31,545	311	30,324	32,961	330
cardamoms	6,092	1,702	10,597	9,997	1,840	17,901	19,458	1,878
cinnamon	24,591	13,577	22,536	21,260	14,748	17,753	19,297	13,113
cumin	11,773	7,656	10,804	10,192	7,255	17,542	19,067	8,413
mace	12,793	1,505	13,847	13,063	1,510	12,550	13,641	1,452
thyme/bay	9,856	3,505	10,513	9,918	4,212	10,745	11,679	4,641
cloves	4,088	3,418	5,087	4,799	2,506	10,425	11,332	3,016
fennel	16,656	8,630	11,189	10,556	7,403	10,251	11,142	7,656
curry	7,664	3,651	7,567	7,139	3,994	7,816	8,496	4,453
coriander	11,147	12,363	7,843	7,399	12,977	7,382	8,024	14,775
turmeric	6,925	5,488	7,007	6,610	6,165	6,606	7,180	6,555
caraway	6,856	9,552	4,810	4,538	5,174	6,490	7,054	6,406
anise	9,276	3,468	7,160	6,755	2,968	6,308	6,857	2,542

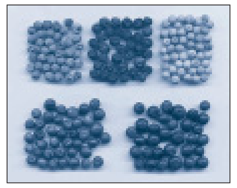
Source: Eurostat (2001)

Figure 5.7 Imports of spices and herbs by EU member countries, 1998-2000, US$ million



Source: Eurostat (2001)

Pepper



In 2000, pepper was the leading spice imported by EU member countries in terms of value, accounting for 38 percent of the total imported value of spices and herbs.

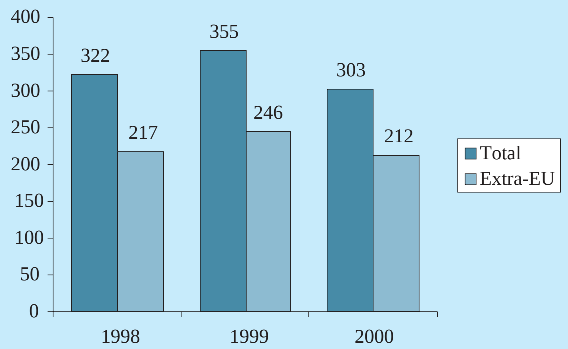
Between 1998 and 1999, imports of pepper by EU member states increased by 10 percent in value but decreased afterwards by 15 percent, amounting to nearly US$ 303 million in 2000. In terms of volume, imports increased by 16 percent between 1998 and 2000, amounting to 68 thousand tonnes in the latter year.

In 2000, 70 percent of the imported value of pepper by EU member countries was supplied extra-EU, almost entirely by developing countries.

Leading EU importers and suppliers of PEPPER (share of the imported value in 2000)

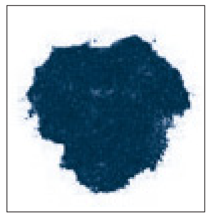
Leading EU importers	→	Germany (27%), The Netherlands (27%), France (12%), UK (9%), Italy (6%)
Leading suppliers	→	Indonesia (31%), The Netherlands (18%), India (11%), Vietnam (10%), Brazil (7%)

Figure 5.8 Imports of pepper by EU member countries, 1998-2000, US$ million



Source: Eurostat (2001)

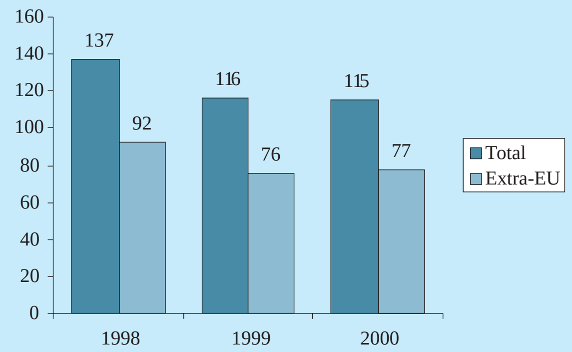
Paprika



Although paprika imports declined in both terms of value and volume, this product group remained the second leading spice imported by EU member countries, accounting for 15 percent of the total spice and herb imports (in value).

After 1998, paprika imports decreased by 16 percent in value and by 12 percent in volume, amounting to US$ 115 million or 53 thousand tonnes in 2000.

Figure 5.9 Imports of paprika by EU member countries, 1998-2000, US$ million



Source: Eurostat (2001)

The Netherlands and Austria were the only leading EU importers which increased their imports in both value and volume during the survey period.

In 2000, about two thirds of the total imported value of paprika originated in countries outside the EU. Developing countries represented almost 80 percent of these countries

Leading EU importers and suppliers of PAPRIKA (share of the imported value in 2000)

Leading EU importers	→	Germany (27%), Spain (20%), The Netherlands (14%), UK (10%), Austria (7%)
Leading suppliers	→	Spain (13%), Zimbabwe (10%), Germany (7%), Hungary (7%), Brazil (6%), China (6%)

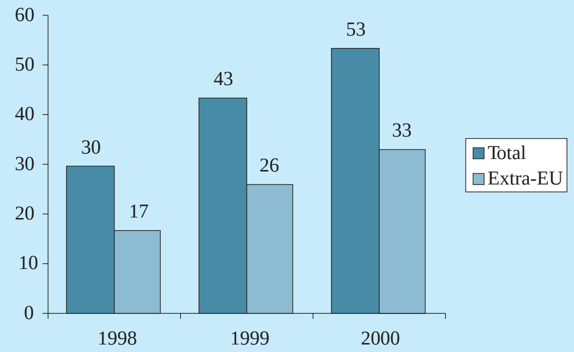
Nutmeg

Between 1998 and 2000, imports of nutmeg increased by about 80 percent in terms of value, amounting to US$ 53 million in the latter year. During the same period, nutmeg imports in terms of volume remained fairly stable, reaching 8.7 thousand tonnes in 2000.

Nearly all EU member countries increased their imports in terms of value during the survey period. The leading two EU importers of nutmeg, The Netherlands and Germany, even doubled their imported values of nutmeg.

In 2000, 62 percent of the imported value of nutmeg by EU member countries was supplied by extra-EU countries, almost entirely by developing countries.

Figure 5.10 Imports of nutmeg by EU member countries, 1998-2000, US$ million



Source: Eurostat (2001)

Leading EU importers and suppliers of NUTMEG (share of the imported value in 2000)

Leading EU importers	→	The Netherlands (39%), Germany (26%), France (11%), Belgium (8%), Italy (4%)
Leading suppliers	→	Indonesia (43%), The Netherlands (27%), Grenada (26%), France (3%), Germany (3%)

Vanilla

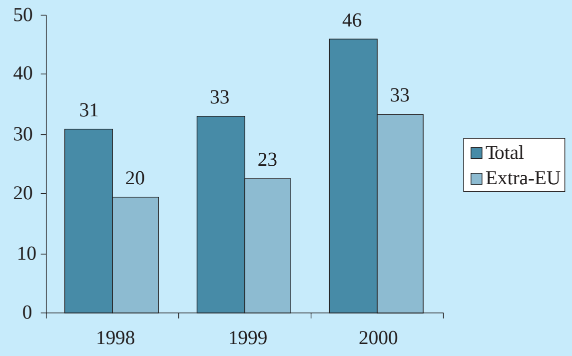
Between 1998 and 2000, vanilla imports by EU member countries increased by almost 50 percent in value, amounting to US$ 46 million in the latter year. In terms of volume, imports increased by 9 percent between 1998 and 1999, but decreased afterwards by 3 percent, amounting to more than 1.8 thousand tonnes in 2000.

The increase in value was mainly caused by the increasing demand for vanilla world wide and the fluctuations in annual production. This in turn also caused prices to fluctuate substantially, resulting in speculation by traders and intermediaries.

The Coca Cola company, for example, introduced a new drink flavour, called Vanilla Coke, in May 2002. The production of this drink means that the Coca Cola Company needs about 200-250 tonnes of vanilla annually, which equals almost 10 percent of the total global production of vanilla.

Although vanilla prices have already increased during the past five years, they are expected to increase even more because of this new drink.

Figure 5.11 Imports of vanilla by EU member countries, 1998-2000, US$ 1,000 / € 1,000 / tonnes



Source: Eurostat (2001)

With the exception of The Netherlands, all the leading EU importers of vanilla increased their imported value between 1998 and 2000.

In 2000, 72 percent of vanilla imports (in value) by EU member countries was supplied extra-EU, of which 93 percent originated in developing countries.

Leading EU importers and suppliers of VANILLA (share of the imported value in 2000)

Leading EU importers →	France (44%), Germany (24%), UK (14%), The Netherlands (5%), Denmark (3%)
Leading suppliers →	Madagascar (56%), Germany (11%), France (7%), Comoros (7%), UK (7%)

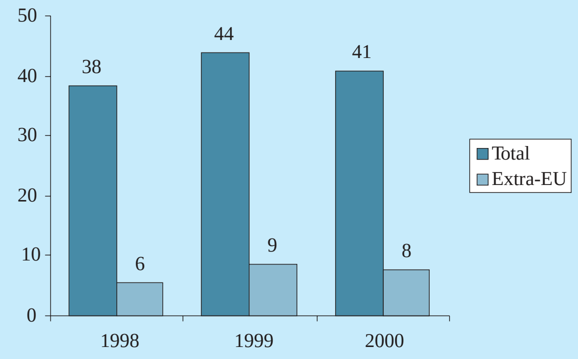
Mixtures

Between 1998 and 1999, imports of mixtures by EU member countries increased by 14 percent in value, but decreased by 7 percent between 1999 and 2000, amounting to US$ 41 million in the latter year.
In terms of volume, imports increased by over one third since 1998, reaching 14.3 thousand tonnes in 2000.

Of the leading EU importers of mixtures, only the United Kingdom showed an overall increase between 1998 and 2000, in both its value and volume imports.

In 2000, less than 20 percent of the imported value by EU member countries originated extra-EU, of which about three quarters came from developing countries.

Figure 5.12 Imports of mixtures by EU member countries, 1998-2000, US$ 1,000 / € 1,000 / tonnes



Source: Eurostat (2001)

Leading EU importers and suppliers of MIXTURES (share of the imported value in 2000)

Leading EU importers →	Belgium (19%), France (16%), Germany (14%), UK (10%), Spain (10%)
Leading suppliers →	Germany (24%), The Netherlands (23%), France (17%), Tunisia (8%), Belgium (4%)

Other spices

Between 1998 and 1999, imports of other spices by EU member countries increased by 17 percent in value, after which they decreased by 16 percent, amounting to US$ 35 million in 2000.

In terms of volume, imports by EU member countries increased by more than a quarter after 1998, reaching 15 thousand tonnes in 2000.

Of the leading EU importers of other spices, only The Netherlands and France increased their imports in both value and volume between 1998 and 2000.

In 2000, one quarter of the imported value of other spices was supplied extra-EU, of which 73 percent originated in developing countries.

Leading EU importers and suppliers of OTHER SPICES (share of the imported value in 2000)

Leading EU importers →	The Netherlands (25%), Germany (14%), France (14%), Belgium (11%), UK (9%)
Leading suppliers →	Germany (30%), The Netherlands (12%), France (10%), UK (9%), India (4%)

Ginger

In 2000, ginger imports by EU member countries amounted to US$ 31.4 million or 24.5 thousand tonnes, representing an increase by 10 percent in value and by 15 percent in volume since 1998.

Of the leading EU importers, the United Kingdom, The Netherlands and Ireland increased their imports in both value and volume during the survey period.

Most of the ginger imports were supplied by countries outside the EU: about 70 percent of the imported value in 2000 was supplied by non-EU countries, of which two thirds by developing countries.

Leading EU importers and suppliers of GINGER (share of the imported value in 2000)

Leading EU importers →	UK (43%), The Netherlands (24%), Germany (13%), France (6%), Ireland (3%)
Leading suppliers →	Thailand (22%), China (15%), Brazil (14%), The Netherlands (11%), Nigeria (6%)

Saffron

Although saffron imports by EU member countries decreased by 19 percent in terms of value since 1998, in terms of volume imports increased by 82 percent, amounting to US$ 30.3 million or 330 tonnes in 2000.

Spain was the only leading EU importer that increased its imports of saffron in both terms of value and volume between 1999 and 2000. About three quarters of the total imported value of saffron originated extra-EU, almost entirely represented by Iran.

Leading EU importers and suppliers of SAFFRON (share of the imported value in 2000)

Leading EU importers →	Spain (53%), Italy (20%), France (11%), Sweden (5%), UK (3%), Germany (3%)
Leading suppliers →	Iran (72%), Spain (12%), Greece (8%), France (4%), Germany (1%)

Cardamoms

As from 1998, cardamom imports by EU member countries almost tripled in terms of value, amounting to US$ 18 million in 2000. In terms of volume, imports increased by only 10 percent during the same period, amounting to nearly 2 thousand tonnes in 2000.

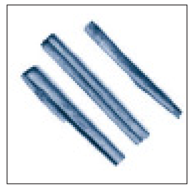
Between 1998 and 2000, nearly every EU member country increased its imports in terms of value, in some cases even considerably.

In 2000, about two thirds of the total cardamom imports (in value) by EU member countries were supplied extra-EU. Developing countries accounted for nearly this entire share.

Leading EU importers and suppliers of CARDAMOMS (share of the imported value in 2000)

Leading EU importers →	UK (27%), Sweden (22%), Finland (14%), The Netherlands (13%), Germany (13%)
Leading suppliers →	Guatemala (53%), The Netherlands (13%), India (7%), UK (7%), Sweden (6%)

Cinnamon



In 2000, the imports of cinnamon by EU member countries amounted to almost US$ 18 million, which represented a decrease by 28 percent in value. In terms of volume, imports increased by 9 percent between 1998 and 1999, but decreased by 11 percent between 1999 and 2000, amounting to 13 thousand tonnes in the latter year.

Between 1998 and 2000, all the leading EU importers of cinnamon decreased their imports in terms of value. Almost 70 percent of 2000 imports (in value) by EU member countries originated in countries outside the EU, almost entirely represented by developing countries.

Leading EU importers and suppliers of CINNAMON (share of the imported value in 2000)

Leading EU importers	→	The Netherlands (27%), Germany (20%), UK (11%), Spain (11%), France (6%)
Leading suppliers	→	Indonesia (35%), Sri Lanka (21%), The Netherlands (19%), Germany (5%), China (4%)

Cumin seeds

As from 1998, imports of cumin by EU member countries increased by almost 50 percent in value and by 10 percent in volume, amounting to US$ 17.5 million or 8.4 thousand tonnes in 2000. All the leading EU importers increased their imports in both terms of value and volume during the survey period.
In 2000, 86 percent of total cumin imports (in value) by EU member countries originated in extra-EU countries, of which more than 90 percent in developing counties.

Leading EU importers and suppliers of CUMIN (share of the imported value in 2000)

Leading EU importers	→	UK (45%), The Netherlands (18%), France (12%), Spain (8%), Germany (7%)
Leading suppliers	→	India (26%), Syria (23%), Turkey (16%), Iran (8%), The Netherlands (6%)

Mace

After increasing by 8 percent between 1998 and 1999, mace imports by EU member countries decreased by 9 percent between 1999 and 2000, amounting to US$ 12.6 million in the latter year. In terms of volume, imports by EU member countries decreased by 4 percent after 1998, amounting to almost 1.5 thousand tonnes in 2000.

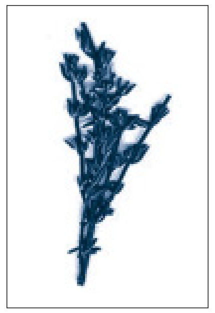
Of the leading EU importers, The Netherlands, France and the United Kingdom increased their mace imports in both terms of value and volume during the survey period.

In 2000, 72 percent of mace imports (in value) by EU member countries was supplied extra-EU, almost entirely represented by developing countries.

Leading EU importers and suppliers of MACE (share of the imported value in 2000)

Leading EU importers	→	The Netherlands (50%), Germany (26%), Belgium (6%), France (5%), UK (5%)
Leading suppliers	→	Indonesia (56%), The Netherlands (21%), Grenada (12%), Germany (3%)

Thyme/Bay leaves



In 2000, total imports of thyme/bay by EU member countries amounted to almost US$ 11 million or 4.6 thousand tonnes, representing an increase of 9 percent in value and of 32 percent in volume since 1998. About one third of the total imported value consisted of bays leaves, the rest was thyme.

France and Spain were the only leading EU importers of thyme/bay which increased their imports in both value and volume between 1998 and 2000.

In 2000, countries outside the EU supplied 56 percent of the total value of thyme/bay imported by EU member countries. Developing countries represented almost 60 percent of this share.

Leading EU importers and suppliers of THYME/BAY (share of the imported value in 2000)

Leading EU importers	→	Germany (25%), France (15%), United Kingdom (13%), Belgium (9%), Spain (8%)
Leading suppliers	→	Turkey (25%), Poland (18%), France (9%), Germany (9%), Spain (7%), Belgium (7%)

Cloves

Between 1998 and 2000, clove imports by EU member countries more than doubled in terms of value, amounting to US$ 10.4 million in 2000. In terms of volume, imports decreased by 27 percent between 1998 and 1999, after which they increased by 20 percent, amounting to 3 thousand tonnes in 2000.

In 2000, 70 percent of the imported value of cloves by EU member countries was supplied extra-EU, entirely represented by developing countries.

Leading EU importers and suppliers of CLOVES (share of the imported value in 2000)

Leading EU importers	→	The Netherlands (28%), France (21%), Germany (14%), UK (14%), Italy (5%)
Leading suppliers	→	Madagascar (30%), Comoros (21%), The Netherlands (15%), Sri Lanka (9%), Indonesia (6%)

Fennel seeds or juniper berries

In 2000, fennel/juniper berries imports by EU member countries amounted to US$ 10.3 million or 7.7 thousand tonnes, representing a decrease by 28 percent in value and by 11 percent in volume compared to 1998. Of the leading importers, only Greece increased its imports (considerably) in both terms of value and volume during the survey period. The United Kingdom and Italy also increased their imports, although only in terms of volume.

In 2000, 68 percent of the total imported value of fennel/ juniper berries was supplied extra-EU, of which 78 percent originated in developing countries.

Leading EU importers and suppliers of FENNEL/ JUNIPER BERRIES (share of the imported value in 2000)

Leading EU importers	→	Germany (43%), UK (14%), Italy (14%), France (9%), Austria (6%), Greece (4%)
Leading suppliers	→	Germany (15%), China (12%), France (10%), Turkey (9%), Yugoslavia Fed. Rep. (8%)

Curry

Although curry imports by EU member countries increased by a considerable 22 percent between 1998 and 2000, in terms of value imports remained more or less stable, amounting to 4.5 thousand tonnes or US$ 7.8 million in 2000.

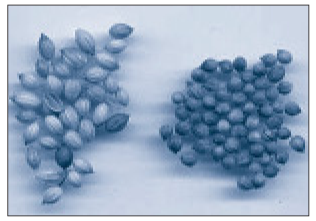
Of the leading EU importers, only the United Kingdom and Ireland increased their imports in terms of value as well as in terms of volume during the survey period.

Almost 60 percent of curry imports (in value) in 2000 originated extra-EU, almost entirely represented by developing countries.

Leading EU importers and suppliers of CURRY (share of the imported value in 2000)

Leading EU importers	→	UK (41%), Germany (12%), France (11%), Belgium (8%), Ireland (6%), Denmark (4%)
Leading suppliers	→	India (40%), UK (22%), Sri Lanka (6%), Germany (6%), The Netherlands (5%)

Coriander seeds



As from 1998, imports of coriander by EU member countries decreased by 34 percent in value but increased by 20 percent in volume, mounting to US$ 7.4 million or almost 15 thousand tonnes in 2000.

In 2000, 70 percent of the total imported value was supplied by non-EU countries, of which 40 percent originated in developing countries.

Leading EU importers and suppliers of CORIANDER (share of the imported value in 2000)

Leading EU importers	→	UK (38%), Germany (19%), The Netherlands (15%), France (7%), Spain (5%)
Leading suppliers	→	India (14%), The Netherlands (12%), Germany (10%), Bulgaria (9%), Egypt (8%)

Turmeric

While turmeric imports by EU member countries decreased by 5 percent in terms of value between 1998 and 2000, in terms of volume imports increased by 19 percent during the same period, amounting to US$ 6.6 million and 6.6 thousand tonnes in 2000.

The Netherlands and France were the only leading EU importers, which increased their imports in terms of value as well as volume during the survey period.

In 2000, more than 80 percent of the total imported value was supplied extra-EU, almost entirely originating in developing countries.

Leading EU importers and suppliers of TURMERIC (share of the imported value in 2000)

Leading EU importers	→	UK (34%), The Netherlands (21%), Germany (20%), France (12%), Belgium (3%)
Leading suppliers	→	India (75%), The Netherlands (9%), Germany (4%), UK (2%), Madagascar (2%)

Caraway seeds

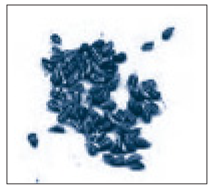
After decreasing by 30 percent in value and by 46 percent in volume between 1998 and 1999, imports of caraway seeds increased thereafter by 35 percent in value and by 24 percent in volume, amounting to US$ 6.5 million and 6.4 thousand tonnes in 2000.

In 2000, more than half of the total imported value of caraway was supplied extra-EU, of which 30 percent originated in developing countries.

Leading EU importers and suppliers of CARAWAY (share of the imported value in 2000)

Leading EU importers	→	Germany (50%), The Netherlands (20%), Austria (11%), France (4%), Belgium (2%)
Leading suppliers	→	The Netherlands (19%), Germany (16%), Canada (13%), Poland (13%), Turkey (6%)

Anise or badian seeds



As from 1998, anise/badian seed imports by EU member countries decreased by 32 percent in value and by 27 percent in volume, amounting to US$ 6.3 million and 2.5 thousand tonnes in 2000.

Germany was the only leading importer which slightly increased its imports during the survey period, although only in terms of volume.
Spain, in particular, decreased its imports considerably, from US$ 1.8 million and 713 tonnes in 1998, down to US$ 0.5 million and 233 tonnes in 2000.

In 2000, 77 percent of total anise and badian seed imports (in value) by EU member countries was supplied extra-EU, of which 94 percent originated in developing countries.

Leading EU importers and suppliers of ANISE / BADIAN (share of the imported value in 2000)

Leading EU importers	→	Germany (30%), The Netherlands (14%), France (14%), Spain (8%), Italy (8%)
Leading suppliers	→	Turkey (38%), Vietnam (13%), China (12%), Syria (7%), The Netherlands (7%)

5.3 The role of the developing countries

Imports of spices and herbs originating in developing countries increased by 8 percent in value during the survey period, amounting to more than US$ 461 million in 2000. In terms of volume, imports remained more or less stable, reaching 148 thousand tonnes in 2000.

The total share of imports (in value) of spices and herbs supplied by developing countries increased from 54 percent in 1998 to 59 percent in 2000. Developing countries played a relatively more important role in imports into The Netherlands and Spain than in imports into the other EU member countries, which mainly reflects the transit and distributing functions of these nations. Of the selected EU member countries, the share of developing countries in imports increased continuously in The Netherlands, Germany and France during the period 1998 to 2000.

Developing countries play a major role in the supply of nearly all spices and herbs, particularly turmeric, cumin, saffron and anise or badian seeds, to the EU. These countries supplied more than 70 percent of total 2000 imports (in value) of these products directly to the EU member countries.

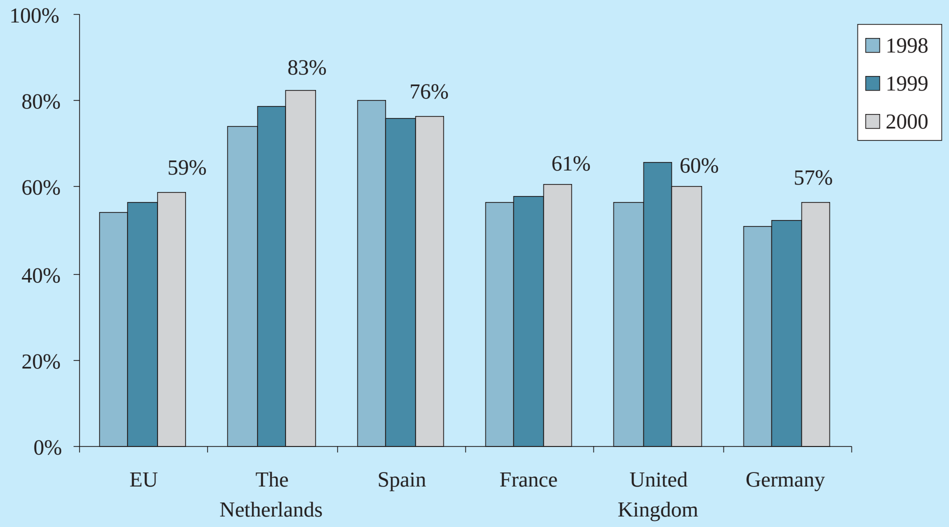
Other important groups were cloves, mace, cinnamon, vanilla, pepper, ginger, cardamoms and nutmeg, all of which more than half of the imported values was supplied directly by developing countries in 2000. As already mentioned, most of the spice and herb imports originate entirely in developing countries, but are re-exported by other (EU member) countries, which largely blurs the import statistics for spices and herbs.

Table 5.3 EU imports of spices and herbs originating in developing countries, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total DC	427,064	145,259	460,534	434,466	149,353	461,452	501,578	148,211
pepper	194,924	36,727	230,847	217,780	46,192	202,509	220,119	45,658
paprika	66,359	36,799	58,404	55,098	33,297	60,346	65,594	29,562
nutmeg	15,844	4,828	25,302	23,870	5,370	32,361	35,175	5,016
vanilla	17,058	704	20,124	18,985	895	31,058	33,759	705
saffron	25,551	50	22,654	21,372	48	22,074	23,993	69
ginger	21,277	17,288	20,105	18,967	15,521	20,722	22,524	18,583
cumin	8,411	5,381	7,301	6,888	5,257	13,993	15,210	6,629
cinnamon	17,432	10,621	16,511	15,576	11,814	12,090	13,141	10,057
cardamoms	4,374	1,287	7,498	7,074	1,170	11,820	12,848	1,172
mace	7,538	853	8,916	8,411	986	8,820	9,587	1,015
cloves	2,846	2,815	2,986	2,817	1,812	7,339	7,977	2,298
other spices	7,085	3,847	7,010	6,613	3,519	6,309	6,858	3,725
mixtures	4,305	1,780	5,337	5,035	2,132	5,674	6,167	2,527
fennel/juniper	8,980	6,252	5,377	5,073	4,779	5,457	5,932	4,884
turmeric	5,653	4,816	5,744	5,419	5,512	5,364	5,830	5,810
anise/badian	6,821	2,649	5,299	4,999	2,353	4,571	4,968	2,037
curry	3,911	2,474	4,065	3,835	2,819	4,401	4,784	3,217
thyme/bay	3,938	1,860	4,087	3,856	2,233	3,470	3,772	1,791
coriander	3,977	3,605	2,472	2,332	3,248	2,075	2,255	2,843
caraway	783	623	494	466	396	998	1,085	613

Source: Eurostat (2001)   DC: Developing Countries

Figure 5.13 Share of developing countries in imports of spices and herbs into the selected EU member countries, 1998-2000, % of imported value



Source: Eurostat (2001)

Leading supplying developing countries of spices and herbs to the EU (share of imported value supplied by developing countries in 2000			Total share DC
turmeric	→	India (93%), Madagascar (2%), Indonesia (1%), Sri Lanka (1%)	81%
cumin	→	India (33%), Syria (29%), Turkey (20%), Iran (10%), United Arab Emirates (5%)	80%
saffron	→	Iran (99%), United Arab Emirates (1%)	73%
anise/badian	→	Turkey (53%), Vietnam (18%), China (17%), Syria (10%), Egypt (2%)	72%
cloves	→	Madagascar (42%), Comoros (30%), Sri Lanka (13%), Indonesia (9%), Tanzania (3%)	70%
mace	→	Indonesia (70%), Grenada (17%), Sri Lanka (1%), Papua New Guinea (1%)	70%
cinnamon	→	Indonesia (51%), Sri Lanka (31%), China (6%), Vietnam (5%), Madagascar (3%)	68%
vanilla	→	Madagascar (83%), Comoros (10%), Uganda (2%), Indonesia (2%)	68%
pepper	→	Indonesia (46%), India (16%), Vietnam (14%), Brazil (11%), Malaysia (8%)	67%
ginger	→	Thailand (34%), China (23%), Brazil (21%), Nigeria (9%), India (6%)	66%
cardamoms	→	Guatemala (81%), India (10%), Colombia (3%), Indonesia (3%)	66%
nutmeg	→	Indonesia (71%), Grenada (27%), Sri Lanka (1%), India (1%)	61%
curry	→	India (60%), Sri Lanka (36%), Jamaica (2%), Vietnam (2%)	55%
fennel/juniper	→	China (22%), Turkey (16%), Yugoslavia Fed. Rep. (15%), Egypt (15%)	53%
paprika	→	Zimbabwe (18%), Brazil (11%), China (11%), Turkey (9%), India (9%)	52%
thyme/bay	→	Turkey (77%), Morocco (11%), Albania (8%), India 1%)	32%
coriander	→	India (48%), Egypt (28%), Morocco (9%), Thailand (3%), Turkey (3%)	28%
other spices	→	India (24%), Thailand (23%), Turkey (9%), China (9%), Brazil (6%)	18%
caraway	→	Turkey (36%), Syria (27%), Egypt (22%), India (6%), Iran (5%), Ethiopia (2%)	15%
mixtures	→	Tunisia (57%), India (12%), China (7%), Turkey (6%), Sri Lanka (4%)	14%
spices & herbs	→	**Indonesia (29%), India (13%), Brazil (7%), Madagascar (7%), Vietnam (7%)**	**59%**

DC: Developing Countries

6 EXPORTS

In 2000, the EU member states together exported about US$ 403 million of spices and herbs, representing a decrease of 4 percent compared to 1998. In terms of volume, exports by EU member countries more than doubled between 1998 and 1999, after which exports decreased to nearly its 1998 level, amounting to about 121.5 million tonnes in 2000.

Please note that, although the US$ is the basic currency unit used to indicate the exported values, Eurostat trade statistics are expressed in € and transferred into US$. Hence the developments in the exported values are also influenced by the € / US$ exchange rate. So while the total imported value in US$ declined during the survey period, in terms of € the imports increased. For more information about the exchange rate, please refer to Chapter 2 of this survey.
Please also refer to Appendix 2 for detailed trade statistics (including the € values) of the EU and of the major national trade markets within the EU.

The largest exporter of spices and herbs in the EU was The Netherlands, accounting for 30 percent of the total exported value by EU member countries in 2000. Other key exporting countries were Spain (19%), Germany (17%), France (10%) and the United Kingdom (7%).

In 2000, the leading destinations for spices and herbs were Germany, the United Kingdom, France, the USA, Belgium and The Netherlands, together receiving 52 percent of total exports (in value) by EU member countries. Most of the trade was intra-EU oriented (65% of total value exports). Leading extra-EU destinations were, next to the USA, Switzerland, Poland, Norway, the Czech Republic and Algeria.

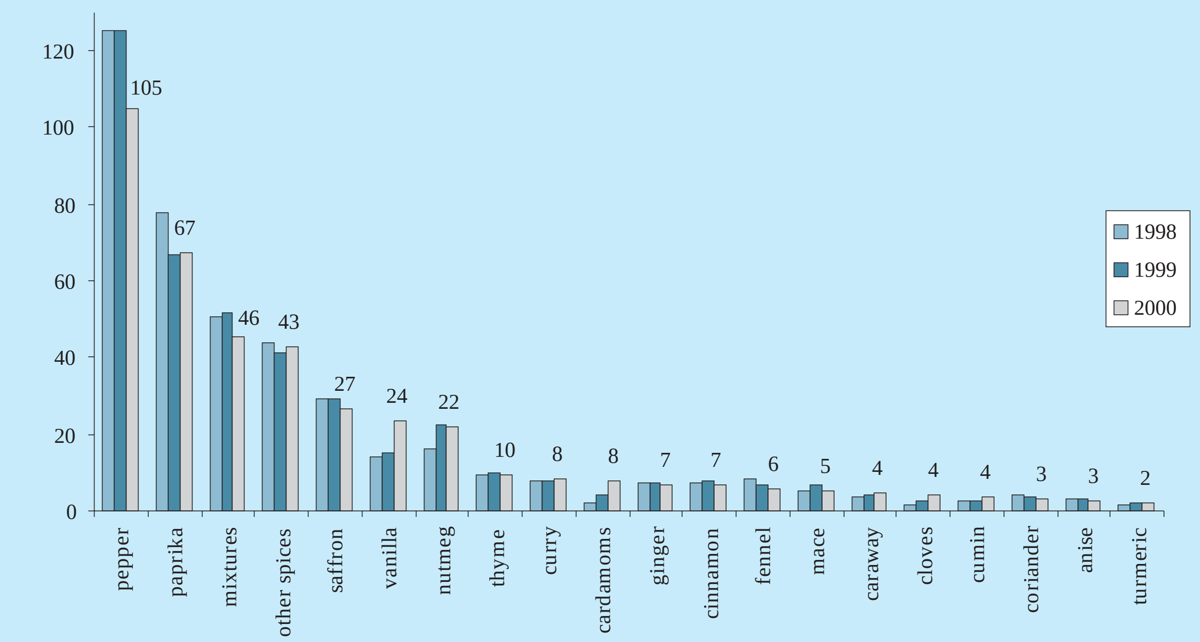
The main export products in 2000, in order of their share in total spice and herb exports (in value) were: pepper (26%), paprika (17%), mixtures (11%), other spices (11%), saffron (7%), vanilla (6%) and nutmeg (5%).

Table 6.1 Exports of spices and herbs by EU member countries, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	420,497	108,010	419,913	396,144	225,914	403,414	438,494	121,490
Extra-EU	145,906	36,632	135,709	128,027	34,883	142,189	154,553	39,901
The Netherlands	115,989	31,402	134,885	127,250	37,189	120,901	131,414	36,334
Spain	84,576	27,162	74,691	70,463	24,700	78,026	84,811	28,531
Germany	85,987	16,408	80,746	76,175	16,370	70,374	76,494	14,673
France	40,139	7,006	41,785	39,420	7,477	41,068	44,639	10,654
United Kingdom	30,480	6,486	25,109	23,688	117,619	29,446	32,006	12,809
Belgium	n.a.	n.a.	21,511	20,293	12,725	18,537	20,149	4,933
Austria	14,584	3,348	15,208	14,347	3,811	15,911	17,295	4,984
Italy	8,891	2,521	8,537	8,054	2,508	10,078	10,954	4,643
Denmark	5,187	763	6,372	6,011	1,439	7,539	8,195	1,869
Sweden	4,250	653	4,111	3,878	625	4,781	5,197	597
Greece	5,631	468	4,207	3,969	429	4,578	4,976	423
Finland	1,618	697	1,341	1,265	558	790	859	542
Ireland	545	186	862	813	263	759	825	305
Portugal	765	164	538	508	200	566	615	187
Luxembourg	n.a.	n.a.	23	22	1	59	64	6
Belgium & Luxembourg	21,852	10,746	–	–	–	–	–	–

Source: Eurostat (2001)

Figure 6.1 **EU exports of spices and herbs, 2000, in US$ million**



Source: Eurostat (2001)

It should be noted that a large part of the EU export trade consists of spices and herbs which have been imported in bulk or in crude form and which, following grinding, processing and/or repackaging, are re-exported to other EU and overseas markets. The only spices which originate in large quantities within the EU are paprika, saffron and caraway seed.

The Netherlands, in particular, has a long history as one of the world's leading traders of spices & herbs, importing and re-exporting large amounts of these products. In 2000, about 85 percent of the total exported value was destined for the other EU member states, mainly to Germany (40%), the United Kingdom (16%) and Belgium (9%). A large part of these re-exports is further redistributed to other countries inside and outside the EU.

7 TRADE STRUCTURE

7.1 EU trade channels

Spices and herbs normally have the same trade structure and distribution channels and very few traders deal exclusively in herbs. The bulk of the trade enters the EU through a small number of major brokers and trader/importers. In the past few years, direct trade between medium-sized and large producers / exporters in developing countries and grinders / manufacturers in consuming markets has become more prevalent. Manufacturers / importers increasingly move away from dealing with many small growers, choosing instead choose to deal with whoever can give them a high quality, high volume, and consistent product.

Typically the main parties involved in the distribution of spices and herbs are:

- **Agents / brokers**

These are independent companies which negotiate and settle business on the instructions of their principals and which act as intermediary between buyer and seller. They do not buy and sell on their own account.

- **Traders/importers**

These specialised traders import on their own account and sell to grinders/processors and to major end users. They mainly buy bulk quantities of unground spices and resell them at an increased price. The importer is responsible for all costs associated with the importation, such as duty, terminal fees, unloading charges, local delivery and warehouse costs. Larger importers clean and grind spices and herbs before exporting them to other EU and North American markets. Smaller traders import some herbs and spices directly, but they also buy from larger traders who can offer them better conditions and delivery terms on small quantities of more specialised items. These smaller traders distribute spices and herbs to blenders, packers and end users in the food trade. The major international trading centres for spices are New York, Rotterdam, London, Hamburg and Singapore.

- **Grinders/processors**

They purchase the raw spices and perform cleaning, grinding and packaging. They have central warehouses for distribution throughout a specific area or they deliver directly to the distribution centres of supermarkets.

Large blenders and packers are increasing their direct purchases of spices and herbs from producers / exporters, but purchasing through importers/traders is also very significant. This latter channel ensures that they can buy and receive supplies of specific spices throughout the year. They tend to hold only small stocks and, although they place orders covering their requirements over a long period, they expect deliveries against these orders to be spread over short and frequent intervals.
Purchasing from an intermediary reduces the risk of late deliveries, poor harvest/supply from individual sources and quality problems. In addition, the services of specialised traders are important for obtaining small consignments of very special requirements at short notice and at competitive prices.

- **End users**

The largest user group is the industrial sector in which the meat and food-processing industries take the largest volumes. Requirements are purchased either from blenders and packers or directly from importing/trading companies.
Some industries have joint arrangements with producers to ensure regular supplies and maintain quality standards and specifications of the spices concerned. Another user group is the catering sector: restaurants/ hotels and institutions (hospitals, schools etc.).

Spice grinders/processors persuade supermarkets to display more spices and herbs on the usual shelf, which is near the sauces and soups, though recently they have begun to recommend display along with other spice/herb related products. Examples of this are salad seasonings, displayed with salad vegetables, or chicken seasoning with chicken or near the fresh meat. This method of displaying complementary products near each other is also used by suppliers of wet and dry cooking sauces, with the result that such sales "hot spots" in supermarkets are keenly sought-after.

Independent grocers, delicatessens, speciality shops (butchers, bakers, spice shops, Indonesian food shops etc.) have a small share. They are important suppliers to large ethnic communities. Even if they have a small market share, they are important for grinders, since they offer higher profit margins and do not compete with the private labels of supermarkets.
Spices and herbs can also be also found at open markets.

The functional distinctions between the different types of traders described above have become blurred in recent years because of structural changes in the trade and a decline in the number of brokers and traders in Western Europe as a whole. Different types of trading activity are often carried out at the same time within one company.

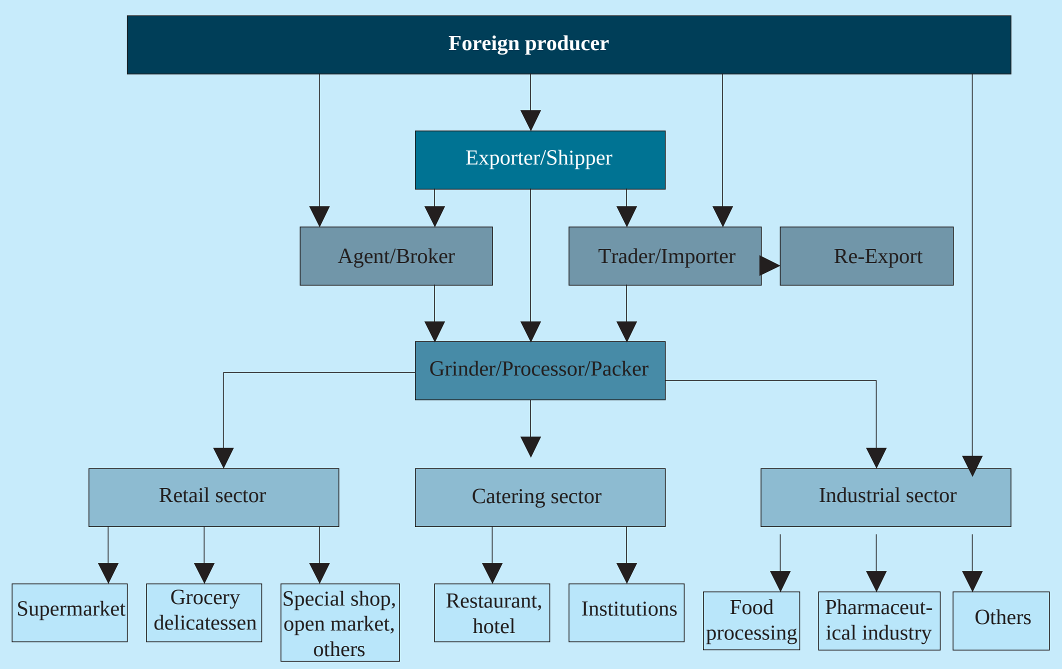
The major EU retail markets are Germany, France, United Kingdom, Spain and Italy, because of their large population sizes.

Within the European spice and herb market, the German Fuchs is the market leader, holding 10 percent of the total market, followed by Unilever (9%) and Mc Cormick. By far the leading spices and herbs company world-wide is McCormick & Co, Inc., whose head office is in Hunt Valley, USA.

This multinational company carries out "global sourcing" of spices and herbs by having subsidiary affiliated companies in the countries of origin. McCormick has operations in several EU member countries.

Major spice and herb companies in the EU are:
- British Pepper & Spice (United Kingdom)
- Sillevoldt (The Netherlands)
- Euroma (The Netherlands)
- Karl Ostmann (Germany)
- Fuchs-Gewürze (Germany)
- Gewürzmühle Nesse (Germany)
- Ferruzzi (Italy)
- Paulig (Finland)
- Nordfalks (Sweden /Norway)
- Dirach, Danske Krydderie (Denmark)
- Kotanyi (Austria).

Figure 7.1 Distribution channel for spices and herbs



Purchasing policies of traders, grinders and processors

Although spices and herbs are traded in a variety of forms, it is estimated that 85 percent are marketed in the whole, unground state. The remainder is sold in ground form or as spiced essential oils and oleoresins. The only ground spices which are traded in any volume are paprika, curry powder and spice mixtures.

There are several major reasons for the low demand for spices which are processed and packed in the country of origin:

distinctive national taste **–** the individual countries and regions within the EU have traditional and distinctive recipes, which demand different flavours and combinations of spices and herbs. Local companies, familiar with these needs, are best placed to prepare and blend the appropriate spices and mixtures.

ever stricter quality regulations **–** the phytosanitary regulations for processed spices are stricter than those for spices in raw dried form. It is, moreover, far more costly and more difficult to clean contaminated ground spices than contaminated unground spices. Increasingly strict governmental regulations and the extremely high quality standards demanded by the food industry are such that few supplying countries can offer cleansed bacteria-free product to meet these requirements;

key service role of major dealers **–** because of the above, spice traders/importers with processing facilities are a key link in the trade and are increasing their business. Their processing plants recondition original import material into ready-to-use single spices and mixtures as strictly specified in recipes from their customers in the food industry and catering and retail packing trade;

requirements of industrial users **–** big end-users (the food industry, butchers, bakers, and retail packers) demand guarantees of constant quality, taste, aroma, colour and delivery reliability. They cannot risk "no stock" situations and therefore prefer to buy spices and spice mixtures prepared for them by EU processors and blenders. These processing companies are rarely dependent on one type or source of a specific spice in order to deliver a consistent supply of that particular spice to their customers;

retail sector controlled by major brands **–** import of consumer packaged spices and herbs is rare because of the strong control exercised on the retail sector by companies with long established and heavily promoted brands. The control of supply to supermarkets is highly computerised. The main brands use service merchandising, which is essential with fast changing assortments of spices, herbs and ready-to-use spice mixtures in every season;

offers to buyers need to be professional **–** occasionally, specific spices and herbs are packed in the branded consumer packing by a foreign supplier under contract to an EU or multinational promoter of that brand. Exporters need to have a good knowledge of the EU market, be consistent in delivery and be prepared to offer service locally. However, the volume of consumer-packed spices and herbs entering international trade is tiny compared to the total trade in spices and herbs.

Germany

Germany is a major trader, processor and re-exporter of spices. Hamburg, along with New York, Rotterdam, Singapore and London, is one of the key world trading centres.

The largest grinder/blender/packer Fuchs-Gewürze (brand: Fuchs) merged in 1998 with Karl Ostmann. Another significant blender/packer in Germany is Ubena.

Large food processors in Germany are Nestlé and Kraft Jacobs Suchard. Moksel Concern and Hermann Laue (of the brand Hela) are important processors of spices for the meat industry.

Ethnic foods are very popular and are sold in sufficient quantities to encourage the German food-processing industry to include them in their product range, adapted to local tastes.

In the ethnic spice and herb segment, the brand Vegeta (Podravka) has already been introduced in the supermarkets of Metro and Edeka.

In the distribution of spices and herbs, supermarkets account for approximately 50 percent of retail sales. In-store promotions on international themes, such as a "Mexican week" or a "Chinese week", are organised increasingly more often.

Almost 20 percent of total sales occurs in discount stores, whose numbers are still growing in Germany; 14 percent is sold in small supermarkets and the remaining 16 percent in delicatessen stores or in other retail outlets.

The Netherlands

Leading Netherlands processors/packers include Van Sillevoldt Specerijen BV (with the brands Golden Start, Silvo, Ster, Taste of Azia, Terra), Verstegen BV, Euroma Netherlands BV, Unifine Industry BV and Huijbregts Groep BV.

The most important Netherlands spice and herb trading companies are Man Produkten Rotterdam BV, Catz International BV, Holland Produce BV, Verstegen International BV and Van Eeghen International BV (especially for herbs). In addition, The Netherlands company Euroherb is a major international trader in organic spices and herbs.

Supermarkets dominate the Netherlands retail sector with around 85 percent of the total market.

France

An apparent trend can be observed within the French distribution channels for products like spices and herbs: innovation, merchandising and promotion have become key words for many of the major producers.

The largest grinder/blender/packer is Eridania-Begin-Say with the brand Ducros, which had 53 percent of the French retail market for spices and herbs in 2000. The second largest blender/packer in France was Amora Maille (Unilever), whose Amora brand had 17 percent. Other brands such as Albert Menes, La Cie des Epices and Gyma together held 16 percent of the French market, while private labels accounted for 14 percent.

United Kingdom

The food industry dominates the use of spices and accounts for an estimated 60 percent of total demand. Large food processors in the United Kingdom are Master Foods (Mars), Unilever and Campbells. Sharwood's, Patak and Master Foods are important brands for ethnic foods, which mainly comprise a fast growing variety of sauces for cooking, stirring and marinating for use in dishes from many different countries. The major UK spice-grinders/blenders, like McCormick and Lion Foods have a major presence in the dry cooking sauce market.

The largest grinder/blender/packer is McCormick (brand: Schwarz), a subsidiary of McCormick of the USA, holding a share of more than 50 percent of the dried spices and herbs market segment in the United Kingdom. Another important grinder/packer is the British Pepper & Spice. All UK grinders/packers supply private labels in addition to their own brand.

In 1996, the distribution of spices and herbs, by grocery multiples accounted for around 73 percent of retail sales. Large British retailers have actively promoted ethnic foods through in-store displays. These mainly took the form of spices being placed in the supermarkets in a related display alongside the food with which they would normally be used, as in having a display of ready-to-use barbecue spices near the meats, or salad seasonings near the salad vegetables.
In these promotional "hot spots", a range of six spices, which were brought together by a common theme, were introduced, often in combination with recipe leaflets, to encourage consumer interest and stimulate impulse purchasing.
Almost 12 percent of spices and herbs was sold in independent grocers, who retained a small but significant share; 9 percent was sold in co-ops and the remaining 6 percent in other retail outlets.

Spain

The food industry uses about 60 percent of all the spices consumed. Large food processors in Spain are Nestlé Spain, Gallina Blanca and Sanboz Nutrition. A large grinder/blender/packer for paprika is Jose Martinez y Cia with the brand Titan and J. Navarro Garcia is a large packer of pepper with the brand Carmencita. Other significant grinders are Albarracin, S.A., Angel Jobal S.A. and Matencio Lopez S.A.

7.2 Distribution channels for developing country exporters

The trade channels most open to new exporters are those for the bulk sale of non-ground spices and herbs to importers/traders. There are several major reasons for the low demand for spices, which are processed and packed in the country of origin. Local importers, processors and packers have long-established links with their customers and are in a better position than distant processors to know the requirements and fluctuations of the local market and the needs of end users.
In The Netherlands market, for example, there has been an expertise in the "gathering" of spices and herbs for many years by the major grinders/processors and packers. They supply supermarket chains directly and are financially able to support exclusive contracts and advertising campaigns or to service in store racks and stock control for spices and herbs. For these reasons, the prospects for exporting processed consumer packed spices directly from the countries of origin are low, however a very high percentage of imported spices and herbs has been dried and cleaned but not otherwise processed.
Importers represent interesting distribution channels for developing country exporters of spices and herbs. Importers not only have experience and knowledge of the international market, they also have strong relationships with suppliers and buyers all over the world. Please refer to Appendix 11 for a list of EU importers of spices and herbs. Some of the importers have an Internet site, where interested parties can find more information on the field in which these importers are active.

The Internet site www.europages.com is another good source for finding contact details and information on the activities of importers. The most interesting contacts at Europages can be found under the category Food and Related Products, subcategory Spices, Sauces, Condiments and Food Extracts.

Trade fairs are also important meeting points for developing countries' exporters and EU importers. A trade fair is a good opportunity for personal contact between business partners.

Please refer to Appendix 6 for contact details of trade fairs. More information on trade fairs is provided in Section 2.2.1 of the EU Strategic Marketing Guide "Spices and Herbs."

8 PRICES AND MARGINS

8.1 Prices and margins

8.1.1 Prices

In the past, speculation by major buyers has been a feature of the trade in spices. In the mid-1980s pepper prices reached a peak. These high prices encouraged additional planting by pepper growers, leading to an oversupply. There has been world-wide over-production in recent years and a stagnating demand for many items in the spice range. This has caused price levels to decrease steadily, with prices reaching an absolute minimum in 1991, when in some cases the market price descended below the cost of production.
These low prices caused producers to lower their production, which in turn reduced the available supply in world markets, so that price levels increased again.

In the case of pepper, the price rose very quickly through 1993 and 1994 but poor demand caused a decline in 1995. After 1996 the price of pepper increased again, because of poor harvests caused by bad weather conditions. In November 1997 both black and white pepper prices reached a record level because of a depletion of world pepper stocks. The prices of cumin and coriander also rose, for reasons similar to those of pepper. After January 1998, prices in most trading markets world-wide eased and, despite a fall in demand, a complete liquidation of stock in both producing and importing countries was necessary to match supply with demand. As from 1998, traders operated on a hand-to-mouth basis and were not willing to take any risks in their trading activities by replenishing their stocks of pepper.

The price of herbs is rising as a result both of increased supply costs (production, processing, and freight) and increased demand. Unlike mint, parsley, oregano, thyme and sage, few herbs are in sufficient demand to encourage their widespread commercial cultivation. The cultivation of most herbs can be expanded fairly quickly. Therefore, even if supplies in the short term are relatively static (with generally only one harvest per year), they are much more elastic over the long term. It is unusual for the price of herbs to remain high for several successive seasons.

In supermarkets, the pack sizes of spices and herbs from suppliers tend to be uniform, but pack contents vary enormously in weight. However, consumers are much more interested in buying specific ingredients for the recipe they are trying to follow than in comparing the pack contents to price ratio. They are likely to assume that similar pack sizes contain similar contents, though this is far from the truth.

Typically the rate at which consumers use herbs and spices is slow and therefore price does not have a high level of influence on the decision to purchase.
There is often little or no difference between retail prices for the same items in different supermarkets or in other retail outlets.

The table on the next pages provides indications for market prices of selected spices and herbs:

8.1.2 Margins

The margins charged by different intermediaries in the spice and herb trade are influenced by many different factors. These include the type of spice or herb, the current and expected future harvest situation, the availability or number of sources for the particular spice, the level of demand and the trend in prices.
All these factors make it extremely difficult to provide information on typical margins in the trade.
The following are very rough guidelines on the mark-up added to the buying price by each type of trader:

• Agent/broker	2-5 percent
• Importer/trader	10-15 percent
• Grinder/processor/packer	20-25 percent (this includes packing but may be much higher depending on the costs of marketing , e.g. for a consumer retail spice brand)
• Retailer	30-40 percent (excl. VAT)

Spices and herbs are particularly attractive products for retailers because of their direct product profitability (gross profit less handling and display costs).
The shelves from which they are sold hold a large amount of stock, which is only depleted slowly for an average retail price € 0.70 per item. The cost of staff to keep the shelf filled is minimal since merchandisers, who are employed by the supplier, undertake this task.

Table 8.1 CIF and shipments quotes on main European port basis, June 2002, $/mt unless otherwise stated

Cardamoms	**Settlement/closing price**	**2002 High**	**2002 Low**
• Guatemala bold green	15,000	15,000	15,000
• Guat. seeds	13,000	14,000	13,000
• Guat. sundried	9,000	9,000	9,000
Caraway seed			
• Dutch ex-store	1,400	1,425	1,250
• East Europe for Rotterdam	1,250	1,275	1,125
Cinnamon bark			
• Seychelles cif	1,400	1,400	1,400
• Madagascar cif	1,150	1,150	1,150
• Sri Lanka 3/6 inch sticks	6,800	6,800	6,800
• Sri Lanka chips	530	550	530
Cloves			
• Madagascar cif Singapore	5,000	7,800	5,000
• Madagascar cif European ports (€/ton)	7,000	9,050	7,000
• Sri Lanka stems cif	850	1,150	850
Coriander seed			
• Australia cif whole	950	950	950
• Bulgaria cif whole	600	600	410
• Egypt cif whole	800	800	800
• India cif whole	750	750	750
• Morocco cif whole	675	675	530
• Romania cif whole	600	600	420
• Russia cif whole	575	575	510
Cumin seed			
• India cif	2,000	2,300	2,000
• Iran cif	1,550	2,500	1,550
Fennel seed			
• India cif	1,200	1,200	1,200
• Egypt cif	1,100	1,100	1,100
Ginger			
• Nigeria split cif	975	975	900
• Cochin cif	1,100	1,250	1,100
• China whole cif	1,000	1,100	1,000
• China sliced cif	750	850	750
• China dry (bleached) cif	1,120	1,120	1,120
Pepper (black)			
• *Sarawak, black label*			
spot	1,700	1,800	1,500
shp May 02/Jun 02	1,600	1,700	1,300
• *Brazil, grade 1*			
spot	1,750	1,800	1,450
shp May 02/Jun 02	1,700	1,700	1,400
• *India, MG 1*			
spot	1,850	2,200	1,650
shp May 02/Jun 02	1,700	2,100	1,400
• *Lam Pong, min 500 g/l*			
spot	1,650	1,800	1,500
shp May 02/Jun 02	1,550	1,700	1,400
Pepper (white)			
• *Sarawak/Muntok, white faq*			
spot	2,100	2,025	1,800
cif Jun 02/Jul 02	1,950	1,950	1,650
• *China cif*	2,200	2,200	2,200

continued

Table 8.1 *continue*

Saffron	Settlement/closing price	2002 High	2002 Low
• Iran c+f Europe Sargol $/kg Jan 02/Feb 02	430	430	430
• Iran c+f Europe Sargol Jan 02/Feb 02	440	440	440
Turmeric			
• Madras fingers cif	575	575	575
Vanilla			
• Madagascar type, extract grade, delivered US ($/kg)	180	180	180
• Madagascar origin standard grade, cif Europe ($/kg)	180	180	180

Source: Public Ledger (June 2002)

8.2 Sources of price information

In general, exporters should receive regular information from their business partner in the EU. Major brokers and traders publish regular market reports to advise their customers about supply, demand and price developments.

Many factors, such as the type of spice or herb, its origin, its quality, the method of drying or cleaning and predictions about the forthcoming harvest(s), can cause considerable fluctuations in both the physical and the futures market for different spices. It is essential that the exporter obtains regular information on prices and market trends.

An on-line computer connection to all countries, through the Internet, makes it possible to follow the latest news and find the best offers on a daily basis. The Market News Service of the ITC (International Trade Centre) is in direct contact with one central reception point in all supplying countries and publishes up-to-date price information in a regular bulletin.

This service was established to assist exporters in developing countries by providing the latest news on prices and trends, as well as details of supply and demand in the importing markets of herbs and spices.

The MNS, located in Geneva, collects the information by telephone, fax and e-mail. The information is gathered, analysed, then transmitted immediately to all participating developing countries.
Exporters who wish to subscribe to this service should contact the ITC. In order to obtain information on the MNS locally, exporters can contact either their export/trade promotion organisation or their exporters' association.

Price information on spices and herbs can be obtained from:

- ITC - International Trade Centre Market News Service (MNS), fortnightly bulletin
- The Public Ledger Weekly publication on commodities with overviews of global market prices
- International Pepper Community Publishes the International Pepper News Bulletin

Please refer to Appendix 4 of this survey for contact details of the published sources of information listed above.

The Indian Spices Board also offers domestic and international prices for spices on its Internet site: *www.indianspices.com*

9 OPPORTUNITIES FOR EXPORTERS

Competition in the food sector is strong and quality requirements are high. Most of the spices and herbs are imported for industrial use and will be further processed and packaged in consumer or catering packs by the European food-processing industry.

Small and medium-sized developing country exporters should seek markets segments in which small amounts of the product can be traded and in which developing country exporters are more equipped to compete.
In this sense, market opportunities in the EU for developing country exporters lie in the production of spices and herbs which are hardly grown in Europe, and in the production of organically grown products.

The advice we can give in order to be successful in the competitive food market is:

- ***Offer a 'concept'***

A general trend in the spices and herbs sector is that importers and food-processing manufacturers in the EU do not simply ask for a spice or herb as such, but for a concept. This means that a product should include complete product specifications, suggestions for application, instructions on how to store and to process, proposals for product presentation, information on quality assurance (e.g. HACCP) or even ISO certification. An exporter capable of meeting these requirements, will have an improved competitive position in the EU market for spices and herbs.

- ***Go 'organic'***

Healthy, natural and organic products are occupying an increasingly stronger position in the EU. This applies to the consumer market as well as to the food-processing industry. Organic production is particularly attractive for growers in developing countries, since much of their food production is already organic or can easily be changed to organic (see Section 3.3). However, going organic is not a panacea. It is not only a question of obtaining the certificate, which involves a lot of personnel efforts and costs, but substantial follow-up efforts are also needed in order to maintain the certificate. Moreover, while margins are currently high, they will decrease if too many producers and exporters go organic.

- ***Adopt HACCP***

Although exporters to the EU are not obliged to apply an HACCP system and their system will not be subject to control by the food inspection service in the importing country, adopting an approved HACCP system, or working following a similar principle of quality control, will be a very positive argument in export business.

More information on HACCP and its adoption is provided in Section 1.1 of the EU Strategic Marketing Guide "Spices and Herbs."

- ***Adopt GAP***

Using Good Agricultural Practices can be used as a marketing instrument. The underlying theme of GAP is knowing, understanding, planning, measuring, recording, and of managing according to identified social, environmental and production goals.
This requires a sound and comprehensive management strategy and the capability for responsive tactical adjustments as circumstances change.
For more details on GAP please refer to *http://www.fao.org/prods/GAP/FAO-GAP.doc*

Market prospects

The usage of spices and herbs by consumers is increasing because these products are appreciated as completely natural ingredients, rather than artificial additives. Apart from being directly used by the industrial and catering sectors as well as consumers, they are also the starting points for the production of many flavours and components of flavours.
This implies that there is a growing market, although the retail market for spices and herbs will be restrained by the growing popularity of wet and dry cooking sauces, which already contain spices and herbs.
Also, the ready-to-use segment will take a larger share in the retail market. In some EU markets there may be opportunities for private brands, but most opportunities should be sought in the industrial sector.

Consumption of convenience and ethnic foods is expected to increase because more and more people are eager to try the new and varied taste of foreign foods. On the other hand, in some EU countries there will still be public resistance to strong new flavours.
Despite the gradual move towards a unified Europe, national dishes remain unique and provide people with a point of difference in which they take a pride.

Also, wide regional differences in taste may limit the rate of growth of the market. Competitive issues in this market are quality and consistency of quality, followed by strong research and development in order to provide innovation and a variety of flavours. This emphasis on quality has led to a higher degree of customer loyalty. Food and drink manufacturers demand consistently high quality and so tend to stick with preferred suppliers who have proved themselves to be reliable. Since dosages of application of spices and herbs in food products are usually low, price has been of secondary importance to quality but may become more important in the future, particularly in the industrial sector.

As with any industry, blenders and packers are under pressure from food manufacturers to keep prices as low as possible. The food-processing industry is extremely competitive, as is the distribution of food products through supermarkets. At the same time, there is continual pressure to develop more and more products to give a wider variety of flavours, with a relative low increase in production costs. New authentic varieties of mixed spices and herbs, e.g. pimento, chillies, allspice (Jamaican pepper) etc., can be introduced in the EU by exporters from developing countries.

The health food sector is also a growing market, as industry and consumers focus more on healthy food and natural flavours as substitutes for sugar, salt and artificial products. Growing public concern over health and the increasing number of food scares may have a positive effect on the growth of the market for spices and herbs. Health problems associated with the excessive consumption of caffeine in coffee and tea are stimulating the market for herbal teas.

There is growing demand for organic spices and herbs in the EU, although Netherlands consumption is still low relative to that in countries like Germany and Austria. Consumer sales of organic food products now amount to about 1.5 percent of total EU sales of food products.

Constraints
Competitive issues in the industrial sector are quality and consistency of quality, followed by strong research and development in order to provide innovation and a variety of flavours. This emphasis on quality has led to a higher degree of customer loyalty. Food and drink manufacturers demand consistently high quality and so tend to stick with preferred suppliers who have proved themselves to be reliable. Partnershipping has led to joint developments of new products and price has been of secondary importance to quality, but may become more important in the future.

The degree of specialisation needed to be a successful flavour supplier and the barriers to be overcome before entering the EU market are making it difficult for other companies to compete.

If the food-processing industry has taught the spices and herbs suppliers anything in the past years, it is that there is only enough room for a limited number of suppliers and, to succeed, one needs to be a technically knowledgeable partner. Although in most developing countries, low priority is given to research programmes on spices and herbs, countries like Indonesia and India have undertaken several successful initiatives.

APPENDIX 1 DETAILED HS CODES AND NOMENCLATURE

HS CODES SPICES AND HERBS

HS CODE		DESCRIPTION
0904		**Pepper of the genus Piper: dried of crushed or ground fruits of the genus Capsicum and Pimenta**
	11	*Pepper of the genus Piper, neither crushed nor ground*
	11 10	Pepper for industrial manufacture of essential oils or resinoids (excluding crushed or ground)
	11 90	Other pepper (excluding crushed or ground and for manufacture of oils or resinoids)
	12	Pepper of the genus Piper, crushed or ground
	20	*Fruits of the genus Capsicum or the genus Pimenta, dried or crushed or ground*
	20 10	Dried sweet peppers (excluding crushed or ground)
	20 31	Dried fruits of genus Capsicum for manufacture of capsicin or capsicum oleoresin dyes (excluding crushed or ground)
	20 35	Dried fruits of genus Capsicum or Pimenta, for industrial manufacture of essential oils or resinoids (excluding crushed or ground)
	20 39	Other dried fruits of genus Capsicum or Pimenta (excluding crushed or ground)
	20 90	Crushed or ground fruits of genus Capsicum or Pimenta
0905		**Vanilla**
0906		**Cinnamon and cinnamon-tree flowers**
	10	Cinnamon and cinnamon-tree flowers (excluding crushed or ground)
	20	Crushed or ground cinnamon and cinnamon-tree flowers
0907		**Cloves: whole fruit, cloves and stems**
0908		**Nutmeg, mace and cardamoms**
	10	*Nutmeg*
	10 10	Nutmeg for industrial manufacture of essential oils or resinoids (excluding crushed or ground)
	10 90	Nutmeg, whether or not crushed or ground (excl. 0908 10 10)
	20	*Mace*
	20 10	Mace (excluding crushed or ground)
	20 90	Crushed or ground mace
	30	Cardamoms
0909		**Seeds of anise, badian, fennel, coriander, cumin, caraway or juniper**
	10	*Seeds of anise or badian*
	10 10	Anise seeds
	10 90	Badian seeds
	20	Coriander seeds
	30	*Cumin seeds*
	30 11	Cumin seeds for industrial manufacture of essential oils or resenoids (excluding crushed or ground)
	30 19	Other cumin seeds (excluding crushed or ground)
	30 90	Crushed or ground cumin seeds
	40	*Caraway seeds*
	40 11	Caraway seeds for industrial manufacture of essential oils or resinoids (excluding crushed or ground)
	40 19	Other caraway seeds (excluding crushed or ground)
	40 90	Crushed or ground caraway seeds
	50	*Seeds of fennel; juniper berries*
	50 11	Fennel seeds or juniper berries for industrial manufacture of essential oils or resinoids (excluding crushed or ground)
	50 19	Other fennel seeds or juniper berries (excluding crushed or ground)
	50 90	Crushed or ground fennel seeds or juniper berrie

continued

HS CODE	DESCRIPTION *continue*
0910	**Ginger, saffron, turmeric (curcuma), thyme, bay leaves, curry and other spices**
10	*Ginger*
10 11	Ginger, whole roots, pieces or slices, for the industrial manufacture of essential oils or resinoids
10 19	Ginger, whole roots, pieces or slices (excl. 0910 1011)
10 90	Ginger (excl. whole roots, pieces or slices)
20	*Saffron*
20 10	Saffron (excluding crushed or ground)
20 90	Crushed or ground saffron
30	Turmeric – curcuma
40	*Thyme and bay leaves*
40 11	Wild thyme (excluding crushed or ground)
40 13	Other thyme (excluding crushed or ground)
40 19	Crushed or ground thyme
40 90	Bay leaves
50	Curry
91	*Mixtures of different types of spices*
91 10	Mixtures of different types of spices (excl. crushed or ground)
91 90	Crushed or ground mixtures of different types of spices
99	*Other spices*
99 10	Fenugreek seed
99 91	Other spices (excluding crushed or ground or 0910 91)
99 99	Other crushed or ground spices (excluding 0910 91)

PRODUCT EXPLANATION OF SPICES AND HERBS

SPICES

Anise seed
Pimpinella anisum is a native of the Middle East. The leaves have a more delicate flavour than the seeds and can be used fresh in salads and with vegetables, soft cheese and yoghurt dishes. The seeds are widely used for flavouring sweets, cakes, liqueurs, sauces and toothpaste, as well as in mouse poison.

Caraway seed
This is a member of the parsley family and a dried fruit of the biennial herb. It grows well in temperate climates and has been used in Europe for a long time. It has a warm, pungent, slightly bitter flavour with aniseed overtones. It is used in rye breads, coffee cakes, seed cake, cheese spreads, goulash, sauerkraut and with vegetables.

Cardamom
Cardamom is the dried fruit of the Elettaria cardomomum matasw. It is used in domestic cookery. In ground form it is used in industry for baked goods, curry powder, sausages, soups and tobacco flavouring. Its oil and oleoresin is used for canned soups and meat products.

Chillies/Paprika/Capsicum
Paprika is used both as a vegetable and as a spice. The mildly purgent chillies are used mainly as spices. Paprika powder is used as a colouring agent both in domestic cookery and in industrial food preparation. Blends of chillies and capsicum give cayenne pepper that is used in prepacked instant food and spicy sauces. Ground capsicum is used for sausages, meat, spaghetti and pizza.

Clove
Cloves are the dried unopened flower buds of the Syzigium aromaticium. They are used for domestic cooking, in the food industry for sauces and pickles and in the distillation of clove bud oil.

Cinnamon/Cassia
Cinnamon is the dried bark of the Cinnamomum verum. Cassia is the dried bark of other species of the Cinnamomum and is considered to be somewhat inferior to cinnamom. Cinnamon is used mainly in the food industry (puddings, sauces, pickles, beverages, biscuits, cakes, curry mixes, candies, chewing gum, confectionery) as well as domestic cooking. The oil is used in bin spice mixes, pickles, ketchups and coca-cola type beverages.

Coriander
Coriander is an annual herb, native of the Mediterranean region. Both the leaves (herbs) and the dried native seeds (spices) are used. The leaves are used for soups and other foods. The seed is an important ingredient in curry powder, pickles, sausages and pastries as well as a flavour for gin. The seed is also the basis for coriander oil and oleoresin.

Cumin seed
Cumin is the aromatic seed of an umbelliferous (umbrella-shaped) plant similar to cow parsley. Originally from the Middle East, it is now a popular spice throughout the East, Mexico, North Africa and India. It has an earthy, pungent, aromatic flavour which is slightly bitter but not hot.
It is used in curries, Mexican dishes, minced meat, meat loaf, pickles, marinades, chutneys, cream cheese dips, cabbage and sauerkraut dishes.

Fenugreek
Seed of the annual herb, belonging to the pea and bean family. It is grown in warm climates such as the Mediterranean, Morocco, France and India. Fenugreek's strong, pungent, aroma has a strong and bitter flavour which often dominates curry powders. It is used in a variety of mixes (Indian shambar powder), hot seasonings for stews (Ethiopian berbere) and in mixes for chutneys and pickles.

Fennel seed
Fennel seeds are the dried ripe fruit of a graceful, feathery leafed, perennial belonging to the parsley family. Once native to the Mediterranean, it is now grown world-wide, especially in Egypt, India and South-East Asia. The oval, yellowish brown seeds have a subtle, sweet anise-like flavour.
It is used in bouillon for fish, fish sauces, sausages, breads, rolls and apple dishes.

Ginger
Ginger is the rhizome of the Zingiber officinale rose.
It is traded in three forms: fresh (green) ginger, preserved ginger (candied in sugar syrup) and dried ginger.
Both preserved and dried ginger are used for domestic culinary purposes as well as for the food-processing industry, notably for jams, marmalades, cakes, confectionery and desserts. Dried ginger is also used for oil extraction.
The oil is mixed in beverages, confectionery and perfumery.

Juniper berries
These are the deep purple fruit of the Juniper bush found growing across the northern hemisphere. They have a bitter sweet, pine flavour with a peppery aftertaste.
They are traditionally used to flavour sauerkraut, and can be used in rich beef stews, marinades, pâtés, veal, venison or pork meats. They are also used in drink manufacturing (gin and liquors).

Nutmeg/Mace
Nutmeg is the kernel of the seed of the Myristica fragrans. Mace is the dried aril that surrounds the single seed within the fruit. Graded nutmeg flavours milk dishes, cake and punches. Mace is used for savoury dishes, pickles and ketchup.
Both nutmeg and mace are also used for oleoresin and oil extraction.

Pepper
Black and white pepper are the dried fruits of the Pepper nigrum L.White pepper is the fruit from which the mesocarp has been removed.
Black pepper is used directly as a spice as well as for the preparation of oleoresin and oil. White pepper is only used directly as a spice. Both are important ingredients in domestic cooking and in the food industry. A third variation, green pepper, is a speciality item used only for luxury foods.

Pimento
Pimento is the dried unripe fruit of the Pimento dioica.
It is also called "Allspice" as the flavour is said to resemble a mixture of cinnamon, clove and nutmeg. The ground berries are used for flavouring and curing processed meat and canned meat as well as bakery products. Ground berries are also used for domestic cooking. The oil of the berries is used in the food industry for meat and fruit flavouring, while in perfumery it is used to create men's fragrances.
The oil of pimento leaves is cheaper than that of the berries but less suitable for flavouring.

Saffron
This, the world's most expensive spice, is the dried red stigmas of the autumn-flowering crocus. It is known as much for its properties as a dye as for its unique and distinctively pungent, honey-like flavour and aroma.
It used to come from Greece and Asia and now it comes from Spain and Portugal. Spanish saffron from La Mancha is now considered to be the best quality. Saffron is used for colouring and flavouring rice for Spanish (paëlla) and Italian dishes, cakes and Mediterranean fish soups.

Turmeric
Turmeric is the dried rhizome of the Curcuma domestica val, valued for its yellow-orange colouring power but also its aroma and flavour. Turmeric is used for domestic cookery and is also an important ingredient of curry powder.
Ground turmeric is used extensively in a wide range of processed food and sauces as well as for dyes. The oleoresin is used like the ground spice in industrial applications.

Vanilla
Vanilla is the fully grown fruit of the orchid Vanilla fragrans, harvested before it is fully ripe after which it is fermented and cured in the producer country. It is used by households and the food industry to flavour ice cream, chocolate, beverages, cakes, custards and puddings. It is also used in certain perfumes.

HERBS

Basil
The two main varieties of basil traded are sweet or common basil Ocinum basilicium L. and bush basil O. Minimum. Because of its larger leaves and richer fragrance, sweet basil is commonly used as a culinary herb while bush basil is used mainly for decorative purposes and as an insect repellent. Basil is used extensively in French, Greek and Italian cooking and also as an ingredient in industrial production/processing of prepared meats, baked goods, sauces, vinegar and liqueurs.

Bay (laurel) leaves
The leaves of the bay tree Laurus mobilis are used to flavour a wide range of domestic dishes and also various types of commercially canned and preserved vegetables, meat and fish. They are a traditional ingredient of curry and of the bouquet garni. Bay berries are pressed or distilled to give a thick greenish oil used in some liqueurs.

Dill
Two species of dill are traded internationally: the leaves of the European dill Anethum graveolens and the fruit (seed) of the Indian dill Anethum sowa. Both are used for food flavouring but are not interchangeable: dill weed is herb-like and bitter, whereas dill seed is herb-like but slightly spicy. Dill seed and oils have many commercial applications in compound seasonings and pickling flavouring for food products, as well as in the perfume and soap industries.

Marjoram
Marjoram Majorama hortensia is a perennial herb of the mint family used widely in European cooking. The dried herb faces competition from oleoresin in the production of some prepared meats and cheese. The essential oil is an ingredient in compound oils for flavouring sauces, canned meats and other food products. Marjoram also has medicinal uses.

Mint
Peppermint Mentha piperata and spearmint Mentha spicata are commercially cultivated. Mint is probably the world's most important flavour after vanilla and citrus. The essential oils meet a large part of the demand for mint flavouring and the leaves are one of the world's most important herbs. Spearmint is the variety in highest demand for culinary purposes and peppermint is used mainly for medicinal applications. Mint tea is prepared from peppermint, the most extensively consumed of the herbal teas, and mint also goes into other beverages including liqueurs. Mint oils and menthol are aromatic agents in toothpaste, mouthwashes and chewing gums.

Oregano
Oregano Origanum vulgare is very important in Italian and other European cooking and is also used by food processors as an anti-oxidant to curb rancidity in foods with high fat content, such as sausages. The dried herb, tincture and essential oil have applications in food flavourings and certain liqueur formulations.

Parsley
Parsley is one of the best known and most used cooking herbs, grown world-wide and used primarily as a fresh herb. The top part of the plant is used as a flavour and a garnish in cooking, while the stems in dried and powdered form serve as a food colour and a dye. The essential oils and oleoresin are used to flavour canned and cured meats and as condiments for compound aromas.

Rosemary
Rosemary (Rosemarinus officinalis) is a vegetable herb used in cooked dishes. Because of its anti-oxidant properties it also goes into the manufacture of meat-based products. The essential oil of the leaves is an ingredient in cosmetics, perfumes and insect repellents.

Sage
The most commonly traded sage herb is Salvia officinalis. The dried herb is used widely both in home cooking and in commercial meat processing and packing. It also goes into herbal teas and medicinal preparations. Sage oils are used to flavour liqueurs, bitters, condiments and cured meats and are an ingredient in perfumery formulations. Sage oleoresin, probably the second leading oleoresin after celery seed, is a substitute for the dry herb as a flavouring agent in industrial meat processing.

Savory
Two species of savory, Satureia Hortensis and Satureia montana are generally commercialised. The herb is used as flavouring in home cooking in Northern Europe in particular. The dried form and tincture are also ingredients in vermouths and bitters. Very small quantities of the essential oil serve as a flavouring in the food industry and as a perfume ingredient.

Tarragon
The fragrant leaves of tarragon Artemisia dracurculus are used, fresh or dried, as a gourmet herb in French cooking and as a popular herb in other European countries. It is an ingredient in commercial preparations including vinegar, mustard, liqueurs and perfumes. The essential oil of tarragon goes into similar commercial products.

Thyme
Thyme is a common kitchen herb. The type traded internationally is derived mainly from the flowering tops of garden thyme and white thyme. Thyme has a wide range of culinary, medicinal and decorative uses. It is commonly used in stuffings and is an essential component of bouquet garni and mixed herbs. It is widely used as a flavouring in both domestic and industrial food preparations.
The essential oil goes primarily into medicinal and germicidal products and also has applications in perfumes, bath preparations and other toiletries. The meat industry uses small quantities of thyme oleoresin as flavouring.

APPENDIX 2 DETAILED IMPORT/EXPORT STATISTICS

The source of the data presented below is Eurostat COMEXT 2001.

IMPORTS

Imports of SPICES AND HERBS by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	786,689	247,946	814,794	768,674	255,737	786,096	854,452	260,759
Extra-EU	497,458	175,589	512,574	483,560	173,257	508,757	552,997	175,580
Developing countries	427,064	145,259	460,534	434,466	149,353	461,452	501,578	148,211
Of which from:								
Indonesia	106,513	25,267	114,622	108,134	27,291	131,697	143,149	32,997
The Netherlands	108,328	27,661	119,970	113,179	32,143	106,981	116,284	30,472
Germany	64,399	15,001	70,538	66,545	19,648	63,638	69,172	21,060
India	55,543	24,383	62,542	59,002	26,430	57,806	62,833	25,974
Brazil	36,436	11,171	43,887	41,403	14,355	33,820	36,761	12,551
Madagascar	17,534	2,927	21,124	19,928	2,656	32,159	34,955	2,685
Vietnam	11,215	3,147	29,021	27,378	7,314	30,415	33,060	7,434
France	32,455	5,650	32,837	30,978	5,829	29,915	32,516	6,087
Spain	30,411	9,783	27,809	26,235	10,038	24,717	26,866	10,530
Iran	27,293	1,566	24,325	22,948	1,550	23,389	25,423	947
United Kingdom	20,101	4,792	19,111	18,029	4,763	21,407	23,269	6,303
China	17,905	9,097	20,150	19,009	8,782	17,143	18,634	11,063
Malaysia	28,693	5,073	31,133	29,371	5,816	16,846	18,311	3,616
Turkey	19,853	7,922	15,825	14,929	6,648	16,267	17,681	7,001
Zimbabwe	18,847	11,250	15,394	14,523	10,762	11,076	12,039	6,208
Belgium	n.a.	n.a.	12,102	11,417	2,899	10,977	11,931	2,653
Guatemala	3,924	1,306	6,854	6,466	1,118	10,562	11,480	1,107
Grenada	6,425	1,775	10,841	10,227	1,962	10,183	11,069	1,380
Thailand	8,777	6,558	9,922	9,360	6,474	10,131	11,012	7,343

Imports of PEPPER by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	321,857	58,565	355,201	335,095	69,179	302,637	328,953	67,944
Extra-EU	216,535	40,529	245,974	232,051	48,843	211,989	230,423	47,717
Developing countries	194,924	36,727	230,847	217,780	46,192	202,509	220,119	45,658
Of which from:								
Indonesia	78,966	13,041	81,545	76,929	13,405	93,190	101,294	20,354
The Netherlands	64,000	10,945	67,197	63,393	12,683	55,101	59,892	12,247
India	33,372	7,284	40,057	37,790	9,139	32,511	35,338	7,164
Vietnam	10,050	2,193	27,747	26,176	6,508	28,887	31,399	6,555
Brazil	29,011	6,098	33,105	31,231	7,721	22,037	23,953	5,590
Germany	20,386	3,854	22,992	21,691	4,211	17,999	19,564	3,749
Malaysia	28,581	5,037	30,988	29,234	5,733	16,744	18,200	3,577
Singapore	20,073	3,581	13,670	12,896	2,415	8,153	8,862	1,771
France	7,558	865	7,070	6,670	978	6,282	6,828	1,103
United Kingdom	3,982	693	3,043	2,871	582	3,746	4,072	809
Madagascar	3,470	785	3,522	3,323	900	2,796	3,039	823
Belgium	n.a.	n.a.	3,299	3,112	484	2,455	2,668	522
China	3,011	483	7,953	7,503	1,367	1,741	1,892	387
Sri Lanka	4,808	899	2,371	2,237	470	1,682	1,828	374

Imports of PAPRIKA by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	136,759	60,460	116,204	109,626	55,782	115,109	125,119	53,191
Extra-EU	92,427	44,891	75,744	71,457	40,166	77,127	83,834	36,494
Developing countries	66,359	36,799	58,404	55,098	33,297	60,346	65,594	29,562
Of which from:								
Spain	20,773	8,162	17,837	16,827	7,969	15,317	16,649	8,222
Zimbabwe	18,725	11,208	15,309	14,442	10,750	11,021	11,979	6,197
Germany	10,510	2,491	9,539	8,999	2,849	8,479	9,216	3,069
Hungary	10,594	3,421	8,541	8,058	3,955	7,483	8,134	3,552
Brazil	3,063	1,251	6,048	5,706	2,667	6,939	7,542	3,002
China	6,840	2,941	6,075	5,731	2,948	6,527	7,095	3,547
Turkey	6,797	1,459	5,993	5,654	1,592	5,606	6,094	1,389
India	4,567	3,247	5,347	5,044	3,678	5,560	6,043	4,080
South Africa	11,280	8,162	6,990	6,594	5,314	5,125	5,571	2,763
Peru	232	191	784	740	477	5,043	5,482	2,630
The Netherlands	5,214	1,652	5,684	5,362	1,867	4,925	5,353	1,528
Mexico	1,350	700	2,021	1,907	779	4,495	4,886	1,326

Imports of NUTMEG by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	29,734	8,691	43,291	40,841	8,959	53,215	57,842	8,670
Extra-EU	16,546	5,064	25,997	24,525	5,509	32,863	35,721	5,108
Developing countries	15,844	4,828	25,302	23,870	5,370	32,361	35,175	5,016
Of which from:								
Indonesia	10,073	3,079	15,245	14,382	3,415	22,832	24,817	3,661
The Netherlands	7,978	1,998	12,317	11,620	2,531	14,390	15,641	2,234
Grenada	5,620	1,680	9,314	8,787	1,787	8,650	9,402	1,206
France	2,550	992	1,294	1,221	212	1,639	1,782	282
Germany	1,155	253	1,574	1,485	271	1,498	1,628	245
Belgium	n.a.	n.a.	1,097	1,035	220	1,494	1,624	237
United Kingdom	153	31	303	286	58	571	621	72
Italy	48	15	461	435	104	518	563	414
Singapore	683	227	606	572	118	471	512	84
Sri Lanka	86	25	350	330	66	449	488	72
India	19	22	319	301	62	366	398	62

Imports of VANILLA by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	30,918	1,743	33,163	31,286	1,898	46,006	50,007	1,847
Extra-EU	19,574	852	22,556	21,279	1,052	33,352	36,252	883
Developing countries	17,058	704	20,124	18,985	895	31,058	33,759	705
Of which from:								
Madagascar	11,798	496	15,943	15,041	719	25,720	27,957	588
Germany	3,268	368	3,445	3,250	339	4,872	5,296	553
France	2,292	200	2,722	2,568	212	3,231	3,512	135
Comoros	3,680	133	3,140	2,962	109	3,169	3,445	56
United Kingdom	4,874	243	3,558	3,357	221	3,028	3,291	207
Canada	1,464	72	1,466	1,383	76	1,081	1,175	62
USA	638	73	559	527	75	883	960	109
Belgium	n.a.	n.a.	66	62	7	651	708	11
Uganda	221	9	31	29	2	638	693	12
Indonesia	976	47	545	514	24	605	658	11
The Netherlands	450	33	356	336	19	458	498	17
Tanzania	0	0	2	2	0	278	302	2

Imports of MIXTURES by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	38,378	10,611	43,817	41,337	13,564	40,916	44,474	14,288
Extra-EU	5,525	2,029	8,674	8,183	2,982	7,762	8,437	3,132
Developing countries	4,305	1,780	5,337	5,035	2,132	5,674	6,167	2,527
Of which from:								
Germany	10,492	2,276	10,327	9,742	2,997	9,901	10,762	3,534
The Netherlands	10,051	3,403	10,281	9,699	3,691	9,241	10,045	3,820
France	6,159	1,151	7,481	7,058	1,597	6,936	7,539	1,430
Tunisia	2,639	1,026	3,375	3,184	1,329	3,262	3,546	1,567
Belgium	n.a.	n.a.	2,381	2,246	595	1,780	1,935	532
United Kingdom	2,160	595	1,897	1,790	580	1,754	1,906	522
USA	741	124	2,780	2,623	718	1,303	1,416	355
Sweden	459	98	723	682	150	1,282	1,393	323
India	382	320	550	519	244	688	748	313

Imports of OTHER SPICES by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	35,211	11,854	41,132	38,804	14,232	34,750	37,772	15,049
Extra-EU	8,277	4,216	8,514	8,032	4,005	8,675	9,429	4,733
Developing countries	7,085	3,847	7,010	6,613	3,519	6,309	6,858	3,725
Of which from:								
Germany	8,574	2,662	12,788	12,064	5,053	10,438	11,346	5,394
The Netherlands	3,777	1,401	5,770	5,443	1,678	3,997	4,345	1,069
France	5,732	952	5,293	4,993	995	3,530	3,837	813
United Kingdom	2,243	590	3,483	3,286	895	3,069	3,336	1,326
India	1,241	1,529	1,868	1,762	1,845	1,535	1,668	1,774
Italy	1,641	535	1,296	1,223	387	1,441	1,566	312
Thailand	1,908	504	1,796	1,694	509	1,425	1,549	466
Israel	25	4	124	117	56	1,148	1,248	201

Imports of GINGER by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	28,529	21,326	29,589	27,914	21,060	31,369	34,097	24,540
Extra-EU	22,739	17,899	21,382	20,172	15,983	22,329	24,271	19,151
Developing countries	21,277	17,288	20,105	18,967	15,521	20,722	22,524	18,583
Of which from:								
Thailand	4,574	4,916	4,954	4,674	4,960	6,952	7,557	5,941
China	3,643	2,334	3,119	2,942	2,422	4,734	5,146	4,719
Brazil	4,263	3,790	4,414	4,164	3,931	4,262	4,633	3,889
The Netherlands	3,522	2,235	4,041	3,812	2,746	3,582	3,894	2,350
Nigeria	3,204	2,823	1,649	1,556	1,934	1,892	2,057	2,360
Spain	31	19	181	171	170	1,847	2,008	185
Germany	699	247	2,171	2,048	1,007	1,697	1,845	853
United Kingdom	692	419	1,115	1,052	777	1,218	1,324	1,015
India	1,567	710	1,890	1,783	686	1,150	1,250	506
South Africa	981	643	1,081	1,020	739	778	846	599

Imports of SAFFRON by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	37,589	181	33,438	31,545	311	30,324	32,961	330
Extra-EU	25,686	55	22,712	21,426	48	22,364	24,309	69
Developing countries	25,551	50	22,654	21,372	48	22,074	23,993	69
Of which from:								
Iran	24,946	41	22,523	21,248	48	21,851	23,751	58
Spain	5,053	94	5,271	4,973	201	3,592	3,904	189
Greece	3,479	7	2,768	2,611	4	2,507	2,725	4
France	1,816	4	1,869	1,763	11	1,124	1,222	12
Germany	1,011	7	374	353	4	224	244	1
United Arab Emirates	59	0	2	2	0	174	189	0
Italy	256	7	70	66	7	172	187	15
India	312	9	61	58	0	166	180	10

Imports of CARDAMOMS by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	6,092	1,702	10,597	9,997	1,840	17,901	19,458	1,878
Extra-EU	4,477	1,330	7,576	7,147	1,180	12,048	13,096	1,194
Developing countries	4,374	1,287	7,498	7,074	1,170	11,820	12,848	1,172
Of which from:								
Guatemala	3,580	1,111	6,232	5,879	971	9,577	10,410	910
The Netherlands	661	151	1,137	1,073	366	2,406	2,615	294
India	339	94	396	374	94	1,186	1,289	132
United Kingdom	137	17	476	449	50	1,166	1,267	106
Sweden	228	54	530	500	76	1,002	1,089	71
Germany	410	120	601	567	88	976	1,061	129
Colombia	60	11	233	220	32	333	362	43
Indonesia	0	0	7	7	0	325	353	24
USA	99	43	64	60	9	188	204	18
France	18	1	105	99	6	148	161	31
Belgium	n.a.	n.a.	154	145	18	136	148	11
Brazil	0	0	0	0	0	123	134	10

Imports of CINNAMON by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	24,591	13,577	22,536	21,260	14,748	17,753	19,297	13,113
Extra-EU	18,542	11,045	17,324	16,343	12,167	12,326	13,398	10,170
Developing countries	17,432	10,621	16,511	15,576	11,814	12,090	13,141	10,057
Of which from:								
Indonesia	8,716	7,085	8,942	8,436	8,940	6,223	6,764	7,325
Sri Lanka	5,378	1,022	5,290	4,991	974	3,788	4,117	735
The Netherlands	3,576	1,717	3,186	3,006	1,879	3,359	3,651	2,258
Germany	926	307	694	655	218	809	879	217
China	926	773	637	601	598	726	789	632
France	595	141	663	625	187	558	607	206
Vietnam	734	723	481	454	484	548	596	675
Madagascar	837	549	441	416	389	330	359	364
Belgium	n.a.	n.a.	216	204	133	236	256	92
Seychelles	587	348	472	445	303	207	225	148
United Kingdom	132	45	143	135	45	169	184	30
India	49	18	141	133	76	146	159	111

Imports of CUMIN SEEDS by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	11,773	7,656	10,804	10,192	7,255	17,542	19,067	8,413
Extra-EU	9,984	6,784	8,282	7,813	6,090	15,094	16,406	7,218
Developing countries	8,411	5,381	7,301	6,888	5,257	13,993	15,210	6,629
Of which from:								
India	2,829	1,617	1,989	1,876	1,122	4,598	4,998	1,863
Syria	496	317	1,693	1,597	1,317	4,069	4,423	2,210
Turkey	2,591	1,862	1,641	1,548	1,223	2,843	3,090	1,300
Iran	2,194	1,399	1,715	1,618	1,388	1,400	1,522	742
The Netherlands	710	379	962	908	735	1,038	1,128	538
United Arab Emirates	391	258	351	331	278	631	686	263
Germany	268	133	652	615	137	498	541	165
China	58	33	17	16	12	439	477	121

Imports of MACE by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	12,793	1,505	13,847	13,063	1,510	12,550	13,641	1,452
Extra-EU	8,449	954	9,173	8,654	1,010	9,021	9,805	1,034
Developing countries	7,538	853	8,916	8,411	986	8,820	9,587	1,015
Of which from:								
Indonesia	6,571	741	7,249	6,839	791	7,070	7,685	809
The Netherlands	3,329	340	3,582	3,379	370	2,623	2,851	286
Grenada	801	94	1,524	1,438	175	1,532	1,665	174
Germany	533	152	412	389	58	331	360	39
Belgium	n.a.	n.a.	293	276	30	186	202	17
France	82	15	83	78	8	181	197	23
Switzerland	10	1	20	19	1	123	134	11
United Kingdom	95	13	261	246	30	107	116	19
Sri Lanka	149	11	88	83	9	98	107	9

Imports of THYME by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	6,170	2,425	6,948	6,555	3,125	7,347	7,986	3,475
Extra-EU	2,595	1,606	3,034	2,862	2,134	3,444	3,744	2,324
Developing countries	1,058	931	1,367	1,290	1,317	877	953	795
Of which from:								
Poland	948	569	1,014	957	672	1,982	2,154	1,407
France	925	156	780	736	167	810	880	218
Spain	877	350	1,152	1,087	399	745	810	311
United Kingdom	202	67	281	265	68	675	734	228
Belgium	n.a.	n.a.	584	551	119	673	731	162
Germany	447	74	393	371	92	585	636	132
Israel	456	56	515	486	72	501	545	84
Morocco	455	558	461	435	543	383	416	415
Albania	330	239	651	614	637	263	286	282
The Netherlands	356	86	410	387	70	260	283	68
Turkey	95	40	135	127	50	128	139	53

Imports of BAY LEAVES by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	3,686	1,080	3,565	3,363	1,087	3,398	3,693	1,166
Extra-EU	2,891	934	2,737	2,582	925	2,624	2,852	1,004
Developing countries	2,880	929	2,720	2,566	916	2,593	2,819	996
Of which from:								
Turkey	2,807	889	2,634	2,485	876	2,540	2,761	927
Germany	290	58	365	344	74	334	363	76
France	230	32	253	239	34	182	198	21
The Netherlands	48	15	54	51	13	132	144	37
Belgium	n.a.	n.a.	58	55	18	44	48	10
Hungary	0	0	16	15	8	28	30	8
United Kingdom	39	3	28	26	3	24	26	4
Albania	11	8	14	13	12	17	19	16
Spain	25	10	7	7	2	15	16	5
Denmark	0	0	0	0	0	14	15	3
Morocco	0	0	28	26	14	14	15	11

Imports of CLOVES by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	4,088	3,418	5,087	4,799	2,506	10,425	11,332	3,016
Extra-EU	2,952	2,888	3,058	2,885	1,836	7,348	7,987	2,303
Developing countries	2,846	2,815	2,986	2,817	1,812	7,339	7,977	2,298
Of which from:								
Madagascar	1,254	1,056	1,041	982	604	3,101	3,371	821
Comoros	404	416	829	782	506	2,194	2,385	739
The Netherlands	401	298	828	781	315	1,585	1,723	374
Sri Lanka	309	211	724	683	317	981	1,066	219
Indonesia	805	1,088	351	331	374	676	735	429
Germany	230	100	456	430	101	508	552	114
France	142	41	447	422	140	462	502	102
United Kingdom	73	9	81	76	18	303	329	63
Tanzania	1	1	0	0	0	218	237	53

Imports of FENNEL SEEDS / JUNIPER BERRIES by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	16,656	8,630	11,189	10,556	7,403	10,251	11,142	7,656
Extra-EU	10,585	7,180	6,741	6,359	5,893	7,002	7,611	6,432
Developing countries	8,980	6,252	5,377	5,073	4,779	5,457	5,932	4,884
Of which from:								
Germany	3,098	873	1,966	1,855	748	1,512	1,644	641
China	1,795	1,884	648	611	786	1,190	1,294	1,032
France	1,109	165	1,317	1,242	197	1,024	1,113	250
Turkey	722	680	858	809	913	884	961	961
Yugoslavia, Fed. Rep.	2,703	1,111	1,266	1,194	908	845	919	716
Egypt	495	532	808	762	803	810	880	887
Bulgaria	813	460	606	572	525	734	798	796
Macedonia	1,342	639	794	749	597	624	678	550
India	895	997	595	561	481	592	643	478

Imports of CURRY by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	7,664	3,651	7,567	7,139	3,994	7,816	8,496	4,453
Extra-EU	4,154	2,530	4,376	4,128	2,926	4,607	5,008	3,283
Developing countries	3,911	2,474	4,065	3,835	2,819	4,401	4,784	3,217
Of which from:								
India	2,782	2,076	2,768	2,611	2,343	3,127	3,399	2,687
United Kingdom	2,213	727	1,765	1,665	586	1,717	1,866	623
Sri Lanka	498	173	570	538	194	489	531	202
Germany	336	82	389	367	111	466	506	125
The Netherlands	429	137	456	430	147	428	465	162
France	278	78	279	263	89	330	359	126
Thailand	174	66	279	263	107	329	358	123
Pakistan	193	96	266	251	127	294	320	155

Imports of CORIANDER SEEDS by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	11,147	12,363	7,843	7,399	12,977	7,382	8,024	14,775
Extra-EU	7,970	9,982	5,062	4,775	9,924	5,142	5,589	11,902
Developing countries	3,977	3,605	2,472	2,332	3,248	2,075	2,255	2,843
Of which from:								
India	1,789	1,768	1,138	1,074	1,389	1,000	1,087	1,129
The Netherlands	1,743	1,414	1,322	1,247	1,497	908	987	1,340
Germany	600	364	531	501	750	765	832	910
Bulgaria	1,203	2,375	700	660	2,228	681	740	2,126
Egypt	1,100	966	782	738	1,056	576	626	954
Hungary	357	721	313	295	865	475	516	1,694
Canada	557	624	417	393	619	452	491	808
Romania	606	954	581	548	1,610	431	469	1,332
Russia	640	1,109	188	177	681	401	436	1,563
United Kingdom	310	190	214	202	125	242	263	322
Morocco	498	295	126	119	139	197	214	363

Imports of TURMERIC by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	6,925	5,488	7,007	6,610	6,165	6,606	7,180	6,555
Extra-EU	5,687	4,828	5,758	5,432	5,518	5,411	5,881	5,840
Developing countries	5,653	4,816	5,744	5,419	5,512	5,364	5,830	5,810
Of which from:								
India	5,263	4,616	5,325	5,024	5,230	4,980	5,413	5,599
The Netherlands	531	282	668	630	329	580	630	407
Germany	234	133	284	268	171	293	319	149
United Kingdom	349	177	157	148	78	112	122	52
Madagascar	59	17	50	47	14	106	115	57
France	62	34	82	77	34	97	105	54
Indonesia	6	6	27	25	16	65	71	21
Ireland	0	0	4	4	2	59	64	10
Sri Lanka	39	6	6	6	0	47	51	7

Imports of CARAWAY SEEDS by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	6,856	9,552	4,810	4,538	5,174	6,490	7,054	6,406
Extra-EU	4,836	7,248	2,344	2,211	2,579	3,358	3,650	3,393
Developing countries	783	623	494	466	396	998	1,085	613
Of which from:								
The Netherlands	883	924	993	937	978	1,215	1,321	1,230
Germany	329	296	368	347	306	1,035	1,125	861
Canada	40	50	127	120	159	873	949	1,040
Poland	1,038	1,484	738	696	871	813	884	904
Turkey	396	292	200	189	143	358	389	194
Syria	160	121	143	135	103	272	296	147
Finland	242	373	281	265	331	248	270	289
Egypt	96	116	81	76	104	215	234	189

Imports of ANISE / BADIAN SEEDS by EU member countries, by supplying country, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	9,276	3,468	7,160	6,755	2,968	6,308	6,857	2,542
Extra-EU	7,027	2,745	5,559	5,244	2,487	4,870	5,294	2,196
Developing countries	6,821	2,649	5,299	4,999	2,353	4,571	4,968	2,037
Of which from:								
Turkey	4,750	1,767	2,992	2,823	1,257	2,415	2,625	1,359
Vietnam	296	134	604	570	270	829	901	161
China	923	376	753	710	334	760	826	176
Syria	711	308	785	741	411	467	508	289
The Netherlands	374	171	420	396	119	452	491	101
Germany	603	151	216	204	63	417	453	104
Hungary	140	73	186	175	103	167	181	98
France	92	25	151	142	37	155	169	34
United Kingdom	40	7	39	37	5	133	145	22
Spain	847	229	529	499	192	125	136	50
Belgium	n.a.	n.a.	67	63	22	84	91	16
Egypt	80	36	96	91	48	75	82	44

EXPORTS

Exports of SPICES AND HERBS by EU member countries, by country of destination, 1998-2000, US$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	420,497	108,010	419,913	396,144	225,914	403,414	438,494	121,490
Extra-EU	145,906	36,632	135,709	128,027	34,883	142,189	154,553	39,901
Leading destinations:								
Germany	73,720	23,516	83,467	78,742	28,351	67,408	73,270	20,194
United Kingdom	29,486	7,284	34,473	32,522	9,631	38,311	41,642	10,221
France	35,553	8,247	29,327	27,667	119,685	29,749	32,336	7,670
USA	27,974	8,596	22,865	21,571	6,411	27,146	29,507	7,446
Belgium	n.a.	n.a.	25,992	24,521	5,889	25,144	27,330	7,746
The Netherlands	26,055	8,313	25,012	23,596	8,271	21,473	23,340	8,296
Austria	17,837	4,876	17,771	16,765	4,959	14,227	15,464	4,211
Italy	15,084	2,443	15,249	14,386	2,819	12,395	13,473	2,393
Sweden	12,341	2,457	12,830	12,104	2,679	12,306	13,376	2,590
Switzerland	12,649	1,783	10,221	9,642	1,831	11,361	12,349	1,810
Spain	12,202	1,954	11,606	10,949	2,229	10,999	11,955	5,734
Denmark	7,675	1,816	8,940	8,434	2,160	8,491	9,229	3,789
Poland	10,940	3,145	10,411	9,822	3,285	8,355	9,082	3,139
Norway	6,246	1,173	7,180	6,774	1,326	7,136	7,756	1,471
Japan	6,704	1,141	6,353	5,993	1,093	6,887	7,486	899
Ireland	4,956	864	6,276	5,921	1,080	6,696	7,278	4,766
Czech Republic	6,793	2,239	6,497	6,129	2,252	6,595	7,168	2,764

APPENDIX 3 STANDARDS ORGANISATIONS

INTERNATIONAL
International Standardisation Institute (ISO)
Address: P.O. Box 56,
CH-1211 Geneva 20, Switzerland
Telephone: + 41 (0) 22 7490111
Fax: + 41 (0) 22 7333430
E-mail: central@iso.org
Internet: www.iso.org

UN/ECE
Trade Division - Agricultural Standards Unit
Address: Palais des Nations,
1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 9174444
Fax: + 41 (0) 22 9170505
E-mail: info.ece@unece.org
Internet: www.unece.org

Joint FAO/WHO Food Standards Programme
CODEX ALIMENTARIUS COMMISSION ESN Division
Address: Viale delle Terme di Caracalla,
00100 Rome, Italy
Telephone: + 39 06 57051
Fax: + 39 06 57053152
E-mail: fao-hq@fao.org
Internet: www.fao.org

EUROPEAN UNION
Comité Européen de Normalisation (CEN)
European Normalisation Committee
Address: Third Countries Unit, Rue de Stassart 36,
B-1050 Brussels, Belgium
Telephone: + 32 (0) 2 5500811
Fax: + 32 (0) 2 5500819
E-mail: infodesk@cenorm.be
Internet: www.cenorm.be

SGS European Quality Certification Institute E.E.S.V.
Address: P.O. Box 200,
3200 AE Spijkenisse, The Netherlands
Telephone: + 31 (0) 181 693750
Fax: + 31 (0) 181 693582
E-mail: sgs.nl.eqci@sgs.com
Internet: www.sgs.nl

FRANCE
Association Française de Normalisation (AFNOR)
Address: 11, avenue Francis de Pressensé,
93571 Saint-Denis La Plaine Cedex, France
Telephone: + 33 (0) 1 41628000
Fax: + 33 (0) 1 49179000
E-mail: norminfo@afnor.fr
Internet: www.afnor.fr

GERMANY
Deutsches Institut für Normung eV (DIN)
Address: Burggrafenstrasse 6,
10787 Berlin, Germany
Telephone: + 49 (0) 30 26010
Fax: + 49 (0) 30 26011231
Internet: www.din.de

SPAIN
AENOR
(Asociación Española de Normalización y Certificación)
Address: Genova 6,
28004 Madrid, Spain
Telephone: + 34 (0) 91 4326000
Fax: + 34 (0) 91 3104032
E-mail: info@aenor.es
Internet: www.aenor.es

THE NETHERLANDS
Nederlands Normalisatie Instituut (NNI)
Address: P.O.Box 5059,
2600 GB Delft, The Netherlands
Telephone: + 31 (0) 15 2690390
Fax: + 31 (0) 15 2690190
E-mail: info@nni.nl
Internet: www.nni.nl

UNITED KINGDOM
British Standards Institution (BSI)
Address: British Standards House,
389 Chiswick High Road,
London W4 4AL, United Kingdom
Telephone: + 44 (0) 208 996 90 00
Fax: + 44 (0) 208 996 74 00
E-mail: info@ bsi-global.com
Internet: www.bsi-global.com

APPENDIX 4 SOURCES OF PRICE INFORMATION

International Trade Centre (ITC)
Publisher of 'Market News Service'
Address: Palais de Nations,
1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 7300 111
Fax: + 41 (0) 22 7300 572
E-mail: itcreg@intracen.org
Internet: www.intracen.org

Agra Europe Ltd.
Publisher of 'The Public Ledger'
Address: 80 Calverly Road,
Turnbridge Wells, Kent,
TN1 2 UN, United Kingdom
Telephone: + 44 (0) 1892 533813
Fax: + 44 (0) 1892 544895
E-mail: marketing@public-ledger.com
Internet: www.public-ledger.com

International Pepper Community
Publisher of 'International Pepper News Bulletin'
Address: 4th Floor, Lina Building,
Jl. H. R. Rasuna Said Kav. B7,
Jakarta 12920, Indonesia
Telephone: + 21 5205 496 / 5200 401
Fax: + 21 5200 401
E-mail: ipc@indo.net.id
Internet: www.ipcnet.org

APPENDIX 5 TRADE ASSOCIATIONS

EUROPEAN UNION
European Spice Association
Address: 6 Catherine Street,
London WC2B 5JJ, United Kingdom
Telephone: + 44 (0) 20 78362460
Fax: + 44 (0) 20 78360580
E-mail mcosta@fdf.org.uk

AUSTRIA
Fachverband der Nahrungs-und-Genussmittel-Industrie
Address: P.O. Box 144,
A-1037 Vienna, Austria
Telephone: + 43 (0) 1 712 2121
Fax: + 43 (0) 1 713 1802
E-mail: tiaa@lebensmittel.wk.or.at

BELGIUM
A VISPA Section Spices
Address: Roodenbeekelaan 30,
B-1030 Brussels, Belgium
Telephone: + 32 (0) 2 743 8741
Fax: + 32 (0) 2 736 8175
E-mail: atispa.vived@sia-dvi.be

FINLAND
Finnish Food Industry's Federation
Address: P.O. Box 115,
F-00241, Helsinki, Finland
Telephone: + 358 (0) 914 8871
Fax: + 358 (0) 914 887201
E-mail: info@itl.fi
Internet: www.itl.fi

FRANCE
COVIB (Syndicat National des Transformateurs de Poivres, Epices, Aromats et Vanille)
Address: 8, Rue de l'Isly,
F-75008 Paris, France
Telephone: + 33 (0) 1 5342 23380
Fax: + 33 (0) 1 534 23381
E-mail: covib@wanadoo.fr

GERMANY
Fachverband der Gewurzindustrie eV
Address: Reuterstrasse 151,
53113 Bonn 1, Germany
Telephone: + 49 (0) 228 216162
Fax: + 49 (0) 228 229460
E-mail: verbaendebuero@t-online.de

ITALY
AIIPA (Associazione Italiana Industrie Prodotti Alimentari)
Address: Corse di Porta Nuova 34,
20121 Milan, Italy
Telephone: + 39 02 654 184
Fax: + 39 02 654 822
E-mail: n.manca@aiipa.it

SPAIN
AFEXPO
Address: Calle Gonzales 2 Adelid 11-2,
G-30001 Murcia, Spain
Telephone: + 34 (0) 968 214089
Fax: + 34 (0) 968 219677

SWEDEN
Foreningen Svenska Kryddtillverkare
Address: P.O. Box 5501,
S-11485 Stockholm, Sweden
Telephone: + 46 (0) 8 7838 272
Fax: + 46 (0) 8 7838 273
E-mail: svenska.i.varlden@sviv.se
Internet: www.sviv.se

THE NETHERLANDS
Netherlands Spice Trade Association
(Nederlandse Vereniging voor de Specerijhandel)
C/o Van Sillevoldt Specerijen BV
Address: P.O. Box 64,
3350 AB Papendrecht, The Netherlands
Telephone: + 31 (0) 78 6151755
Fax: + 31 (0) 78 6153107

UNITED KINGDOM
Seasoning and Spice Assocation
Address: 6 Catherine Street,
London WC2B 5JJ, United Kingdom
Telephone: + 44 (0) 207 836 2460
Fax: + 44 (0) 207 836 058

APPENDIX 6 TRADE FAIR ORGANISERS

Alimentaria
Frequency: biennial (2002 Barcelona)
Address: Reed Exhibitions Iberia, C/ Diputació 119, E-08015 Barcelona, Spain
Telephone: + 34 (0) 9345 2072 2
Fax: + 34 (0) 9345 1663 7
Internet: www.reedexhibitions.com

ANUGA
Frequency: biennial (2003 Köln)
Address: Köln messe, Messeplatz 1, 50679 Cologne, Germany
Telephone: + 49 (0) 221 8210
Fax: + 49 (0) 221 8212 574
E-mail: anuga@koelnmesse.de
Internet: www.koelnmesse.de/anuga

Bio Fach (Certified organic products)
Frequency: annual (Nürnberg)
Address: Nürnberg Messe GmbH, 90471 Nürnberg, Germany
Telephone: + 49 (0) 911 86060
Fax: + 49 (0) 911 86068228
E-mail: info@biofach.de
Internet: www.biofach.de

Authentic Food Market
Frequency: annual (2003 London)
Address: 11 Manchester Square, London W1U 3PL, United Kingdom
Tel: + 44 (0) 20 7886 3100
Fax: + 44 (0) 20 7886 3091
E-mail: europeanethenic@freshrm.co.uk
Internet: www.authenticfoodmarket.com

Food Ingredients Europe
Frequency: biennial, alternate with **Health Ingredients Europe** (2003 Frankfurt, 2004 Amsterdam, 2005 London)
Address: Miller Freeman BV, P.O. Box 200, 3600 AE Maarssen, The Netherlands
Telephone: + 31 (0) 346 5594 44
Fax: + 31 (0) 346 5738 11
E-mail: fi@unmf.com
Internet: www.fi-events.com

Horecava
Frequency: Annual (2003 Amsterdam)
Address: Amsterdam RAI, Europaplein 8, P.O. Box 77777, 1070 MS Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5491212
Fax: + 31 (0) 20 5491843
E-mail: horecava@rai.nl
Internet: www.rai.nl

IBA
Frequency: Annual (2003 Düsseldorf)
Address: Messe Düsseldorf GmbH, P.O. Box 10 10 06, 40001 Düsseldorf, Germany
Telephone: + 49 (0) 211 456001
Fax: + 49 (0) 211 4560668
Internet: www.messe-duesseldorf.de

International Food Exhibition
Frequency: biennial (2003 London)
Address: 11 Manchester Square, London W1U 3PL, United Kingdom
Tel: + 44 (0) 20 7886 3100
Fax: + 44 (0) 20 7886 303
E-mail: ife@freshrm.co.uk
Internet: www.ife.co.uk

Interherba
Frequency: Annual (2003 Poznań)
Address: Institute of Plants and Herbal Preparations, ul. Libelta 27, 61-707 Poznań, Poland
Telephone: + 48 (0) 61 869 23 55
Fax: + 48 (0) 61 869 29 52
E-mail: interherba@mtp.com.pl
Internet: www.interherba.pl

SIAL
Frequency: biennial (2004 Paris)
Address : 1 Rue du Parc, 92593 Levallois-Perret, France
Telephone : + 33 (0) 1 4968 5499
Fax : + 33 (0) 1 4731 3782
Internet: www.sial.fr

APPENDIX 7 TRADE PRESS

INTERNATIONAL
Market News Service
Address: International Trade Centre UNCTAD/WTO, Palais des Nations, CH-1211 Genève 10, Switzerland
Telephone: + 41 (0) 22 7300 111
Fax: + 41 (0) 22 7300 572
E-mail: itcreg@intracen.org
Internet: www.intracen.org

International Pepper News Bulletin
Address: International Pepper Community, 4th Floor, Lina Building, Jl. H. R. Rasuna Said Kav. B7, Jakarta 12920, Indonesia
Telephone: + 21 5205 496 / 5200 401
Fax: + 21 5200 401
E-mail: ipc@indo.net.id
Internet: www.ipcnet.org

International Food Ingredients
Address: Miller Freeman BV, P.O. Box 200, 3600 AE Maarssen, The Netherlands
Telephone: + 31 (0) 346 559 458
Fax: + 31 (0) 346 573 811
Internet: www.ifi-online.com

Foodnews
Address: 80 Calverley Road, Tunbridge Wells, Kent TN1 2UN, United Kingdom
Telephone: + 44 (0) 1892 533813
Fax: + 44 (0) 1892 544895
E-mail: marketing@foodnews.co.uk
Internet: www.foodnews.co.uk

Food Manufacture / The Grocer
William Reed Group
Address: Broadfield Park, Crawley, West Sussex RH11 9RT, United Kingdom
Telephone: + 44 (0) 1293 610488
Internet: www.william-reed.co.uk

GERMANY
Hot Spice Newsletter
Address: Pickhuber 5, 20457 Hamburg, Germany
Telephone: + 49 (0) 40 36901847
Fax: + 49 (0) 40 37503715
Internet: www.hotspice.de

Lebensmittel Praxis
LPV Lebensmittel Praxis Verlag Neuwied GmbH
Address: Am Hammergraben 14, 56567 Neuwied, Germany
Telephone: + 49 (0) 26 31 8790
Fax: + 49 (0) 26 31 879213
Internet: www.lpvnet.de

FRANCE
LSA - Libre Service Actualite
Address: 12-14 rue Médéric, 75017 Paris, France
Telephone: + 33 (0) 1 56794100
Internet: www.lsa.fr

SPAIN
Alimarket Revista
Address: Albasanz 14, 28037 Madrid, Spain
Telephone: + 34 (0) 91 3274340
E-mail: informa@alimarket.es
Internet: www.alimarket.es

ITALY
Nuova Distribuzione
Address: Via Creta 56, 25124 Brescia, Italy
Telephone: + 39 030 220261
Fax: + 39 030 225868
E-mail: promodis@promodis.it
Internet: www.promodis.it

BELGIUM
Distributie Vandaag
Address: Mariannestraat 34, 1180 Brussels, Belgium
Telephone: + 32 (0) 2 3459923
Fax: + 32 (0) 2 3460204
E-mail: info@cbd-bcd.be
Internet: www.cbd-bed.be

THE NETHERLANDS
Foodmagazine / Distrifood
Elsevier Business Information
Address: Van de Sande Bakhuyzenstraat 4, 1061 AG Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5159 222
Fax: + 31 (0) 20 5159 990
E-mail: marketing.food@reedbusiness.nl
Internet: www.zibb.nl/food

Food Personality
Mediaset Uitgeverij
Address: P.O. Box 499,
6500 AL Nijmegen, The Netherlands
Telephone: + 31 (0) 24 3580722
Fax: + 31 (0) 24 3581540
E-mail: info.publishing@mediaset.nl
Internet: www.mediaset.nl/publishing

Voedingsmiddelen Technologie (VMT)
Address: Keesing Noordervliet B.V., P.O. Box 325,
3990 GC Houten, The Netherlands
Telephone: + 31 (0) 30 6358585
Fax: + 31 (0) 30 6358500
E-mail: VMT@keesing.nl
Internet: www.vmt.nl

APPENDIX 8 BUSINESS SUPPORT ORGANISATIONS

INTERNATIONAL
International Trade Centre UNCTAD/WTO (ITC)
Address: Palais des Nations, P.O. Box 10,
1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 7300111
Fax: + 41 (0) 22 7334439
E-mail: itcreg@intracen.org
Internet: www.intracen.org

AUSTRIA
Austrian Federal Economic Chamber
Address: P.O. Box 150,
A-1045 Vienna, Austria
Telephone: + 43 (0) 1 501050
Fax: + 43 (0) 1 50105-150
E-mail: aw-online@aw.wk.or.at
Internet: www.wk.or.at/aw/aw_intl/index.htm

DENMARK
DIPO (Danish Import Promotion Office for Products from Developing Countries)
Address: Danish Chamber of Commerce, Børsen,
1217 Copenhagen K, Denmark
Telephone: + 45 (0) 33 950541
Fax: + 45 (0) 33 120525
E-mail: dipo@commerce.dk
Internet: www.dipo.dk

GERMANY
BfAI, Federal Office of Foreign Trade Information
Address: Agrippastrasse 87-93, P. O. Box 100522,
50455 Cologne, Germany
Telephone: + 49 (0) 221 2057-0
Fax: + 49 (0) 221 2057-212
E-mail: bus.contacts@bfai.com
Internet: www.bfai.com

ITALY
ICE
Italian National Institute for Foreign Trade
Address: Via Liszt 21,
00144 Rome, Italy
Telephone: + 39 06 59921
Fax: + 39 0659926900
E-mail: ice@ice.it
Internet: www.ice.it

THE NETHERLANDS
CBI (Centre for the Promotion of Imports from developing countries)
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

NORWAY
Norad (Norwegian Agency for Development Co-operation)
Address: Tolbugaten 31, P.O. Box 8034 Deo,
Oslo, Norway
Telephone: + 41 (0) 22 242030
Fax: + 41 (0) 22 242031
Internet: www.norad.no

SWEDEN
SIDA (Swedish International Development Co-operation Agency - Department for Infrastructure & Economic Co-operation)
Address: Sveavägen 20,
S-105 25 Stockholm, Sweden
Telephone: + 46 (0) 8 6985000
Fax: + 46 (0) 8 6208864
E-mail: sida@sida.org.se
Internet: www.sida.se

SWITZERLAND
SIPPO (Swiss Import Promotion Programme)
Address: Stampfenbachstrasse 85,
CH-8035 Zurich, Switzerland
Telephone: + 41 (0) 1 365 5200
Fax: + 41 (0) 1 365 5202
E-mail: info@sippo.ch
Internet: www.sippo.ch

APPENDIX 9 OTHER USEFUL ADDRESSES

INTERNATIONAL
International Chamber of Commerce
Address: 38, Cours Albert 1er,
75008 Paris, France
Telephone: + 33 (0) 1 49532828
Fax: + 33 (0) 1 49532942
E-mail: icc@iccwbo.org
Internet: www.iccwbo.org

IFOAM
International Federation of Organic Agriculture Movements
Address: c/o Ökozentrum Imsbach,
D-66636 Tholey-Theley, Germany
Telephone: + 49 (0) 6853 919890
Fax: + 49 (0) 6853 919899
E-mail: IFOAM@t-online.de
Internet: www.ifoam.org

EUROPE
TransFair International
Fair trade organisation
Address: Remigiusstraße 21,
50937 Cologne, Germany
Telephone: + 49 (0) 221 94 20400
Fax: + 49 (0) 221 94 204040
E-mail: info@transfair.org
Internet: www.transfair.org

GERMANY
BCS ÖKO-GARANTIE GMBH
Contact point for organic certification
Address: Cimbernstrasse 21,
90402 Nürnberg, Germany
Telephone: + 49 (0) 911 49173
Fax: + 49 (0) 911 492239
E-mail: bcsgermany@aol.com

Ecocert
Contact point for organic certification
Address: Sülte 20,
37520 Osterode, Germany
Telephone: + 49 (0) 5522 951161
Fax: + 49 (0) 5522 951164
E-mail: info@ecocert.de

GTZ Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH
Service enterprise for development cooperation
Address: Dag-Hammarskjöld-Weg 1-5,
65760 Eschborn, Germany
Telephone: + 49 (0) 6196 790
Fax: + 49 (0) 6196 791115
E-mail: postmaster@gtz.de
Internet: www.gtz.de

Naturland Verband für naturgemäßen Landbau e.V
Germany's Naturland association for organic agriculture
Address: Kleinhaderner Weg 1,
82166 Gräfelfing, Germany
Telephone: + 49 (0) 89 8980820
Fax: + 49 (0) 89 89808290
E-mail: naturland@naturland.de
Internet: www.naturland.de

Deutsches Tiefkühlinstitut e.V.
Address: Bonner Straße 484-486,
50968 Köln, Germany
Telephone: + 49 (0) 221 937480
Fax: + 49 (0) 221 9374822
Email: infos@tiefkuehlinstitut.de
Internet: www.tiefkuehlinstitut.de

FRANCE
Ecocert
Contact point for organic certification
Address: P.O. Box 47,
F-32600 L'Isle-Jourdain, France
Telephone: + 33 (0) 5 62073424
Fax: + 33 (0) 5 62071167
E-mail: info@ecocert.fr
Internet: www.ecocert.fr

THE NETHERLANDS
CBI/Accesguide
CBI's database on European non-tariff trade barriers
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
Email: accessguide@cbi.nl
Internet: www.cbi.nl/accessguide

The Ministry of Public Health, Welfare and Sports
Address: Food Inspection Service, P.O. Box 16108,
2500 BC The Hague, The Netherlands
Telephone: + 31 (0) 70 3405060
Fax: + 31 (0) 70 3405435
Internet: www.minvws.nl

SKAL
Internationally operating organisation, inspecting and certifying sustainable agricultural production methods and products
Address: P.O. Box 384,
8000 AJ Zwolle, The Netherlands
Telephone: + 31 (0) 38 4268181
Fax: + 31 (0) 38 4213063
E-mail: info@skal.com
Internet: www.skal.com

Stichting Max Havelaar
Max Havelaar Foundation, fair trade organisation
Adres: P.O. Box 1252,
3500 BG Utrecht, The Netherlands
Telefoon: + 31 (0) 30 2337070
Fax: + 31 (0) 30 2332992
E-mail: maxhavelaar@maxhavelaar.nl
Internet: www.maxhavelaar.nl

UNITED KINGDOM
Soil Association
IFOAM accredited contact point for organic certification
Address: Bristol House, 40-56 Victoria Street,
Bristol BS1 6BY, United Kingdom
Telephone: + 44 (0) 117 9142400
Fax: + 44 (0) 117 9252504
E-mail: info@soilassociation.org
Internet: www.soilassociation.org

APPENDIX 10 LIST OF DEVELOPING COUNTRIES

The countries listed below are taken from the OECD DAC list of countries receiving Official Development Assistance (Part I). The list used is the one as at 1/1/2000.

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo, Dem. Rep
Congo, Rep.
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
Gabon
Gambia
Georgia
Ghana
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Nicaragua
Niger
Nigeria
Niue
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Paraguay
Peru
Philippines
Rwanda
São Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Timor
Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zambia
Zimbabwe

APPENDIX 11 LIST OF NETHERLANDS IMPORTERS AND LEADING EU IMPORTERS

GERMANY

AKO Salze & Gewürze Vertriebs GmbH
(importer / trader in spices, additives and preservatives)
Address: Chemnitzer Straße 14, 30952 Ronnenberg/Empelde, Germany
Telephone: + 49 (0) 511 946850
Fax: + 49 (0) 511 9468555
E-mail: info@ako-spice.com
Internet: www.ako-spice.com

Friedrich Gewürze GmbH
(importer / distributor of spices and other ingredients)
Address: Marktstätte 8, 78462 Konstanz, Germany
Telephone: + 49 (0) 7531 892760
Fax: + 49 (0) 7531 8927610
E-mail: info@ingredients.de
Internet: www.ingredients.de

FUCHS Gewürze GmbH & Co
(importer / processor / distributor of spices and herbs)
Address: Westring 15-17, 49201 Dissen, Germany
Telephone: + 49 (0) 5421 3090
Fax: + 49 (0) 5421 309111
E-mail: info@fuchs-gewuerze.de
Internet: www.fuchs-gewuerze.de

Gewürz Mühle Nesse GmbH
(importer / processor / distributor of spices and herbs)
Address: Im Tweyad 1, 27612 Loxstedt-Nesse, Germany
Telephone: + 49 (0) 4744 91810
Fax: + 49 (0) 4744 918171
E-mail: service@nesse.de
Internet: www.nesse.de

Gewürzmüller GmbH
(importer / manufacturer of spices and spice products)
Address: Klagenfurter Str.1-3, 70469 Stuttgart, Germany
Telephone: + 49 (0) 711 89990
Fax: + 49 (0) 711 8999226
E-mail: info@gewuerzmueller.de
Internet: www.gewuerzmueller.de

Henry Lamotte GmbH
(importer / processor of spices and herbs)
Address: P.O. Box 10 38 49, D-28038 Bremen, Germany
Telephone: + 49 (0) 421 5239 0
Fax: + 49 (0) 421 5239 199
E-mail: info@lamotte.de
Internet: www.lamotte.de

Ostmann Gewürze GmbH & Co.
(importer / blender / packer of spices and herbs)
Address: Westring 15-17, 49201 Dissen a.T.W., Germany
Telephon: + 49 (0) 5421 3090
Fax: + 49 (0) 5421 309111
E-mail: info@ostmann-gewuerze.de
Internet: www.ostmann-gewuerze.de

Robeca Import Export GmbH
(trading company - seeds, spices, bakery seeds and pulses)
Address: Glüsinger Weg 12, 21255 Tostedt, Germany
Telephone: + 49 (0) 4182 292021
Fax: + 49 (0) 4182 70286
E-mail: info@robeca.de
Internet: www.robeca.de

Ubena Gewürzvertrieb GmbH
(importer / blender / distributor of spices and herbs)
Address: Westring 15-17, 49201 Dissen a.T.W.
Telephone: + 49 (0) 5421 3090
Fax: + 49 (0) 5421 309222
E-mail: info@ubena.de
Internet: www.ubena.de

Van Hees & Gewürzmühlen GmbH
(importer / manufacturer of spices and herbs for meat products)
Address: Kurt-van-Hees-Straße 1, 65396 Walluf, Germany
Telephone: + 49(0) 6123 7080
Fax: + 49(0) 6123 708240
E-mail: van-hees@van-hees.com
Internet: www.van-hees.com

FRANCE

Albert Menes
(importer / distributor of spices)
Address: 16 Boulevard Jean Jaures, 92110 Clinchy
Telephone: + 33 (0) 147 155300
Fax: + 33 (0) 147 371380

Amora-Maille
(major importer / processor of spices and herbs)
Address: 48, quai Nicolas Rolin, P.O. Box 670, 21017 Dijon Cedex, France
Telephone: + 33 (0) 3 80444444
Fax: + 33 (0) 3 80444423
Internet: www.amora-maille.fr

Cepasco Spigol
(importer / manufacturer / distributor of spices)--
Address: P.A. de Gémenos, 25, Avenue de Coulin, 13 420 Gemenos, France
Telephone: + 33 (0) 4 42322323
Fax: + 33 (0) 4 42322387
E-mail: cepasco@cepasco.com
Internet: www.spigol.com

Ducros France
(major importer / processor of spices and herbs)
Address: Quartier Le Terradou, P.O. Box 181, 84205 Carpentras Cedex
Telephone: + 33 (0) 4 90638989
Fax: + 33 (0) 4 90601803
Internet: www.ducros.fr

Moguntia Est Epices SA
(importer / manufacturer of spices)
Address: 13 Rue du Travail, 67720 Hoerdt, France
Telephone: + 33 (0) 388 513951
Fax: + 33 (0) 388 681932

Tradimpex JM Thiercelin SA
(importer / manufacturer of spices and herbs)
Address: P.O. Box 23 Z.I. Saint Nicolas 94510 La Queue En Brie, France
Telephone: + 33 (0) 145 93032
Fax: + 33 (0) 145 930810
E-mail: info@tradimpex-jmthiercelin.fr
Internet: www.tradimpex-jmthiercelin.fr

Weishardt International SARL
(importer of spices and herbs)
Address: Route Réalmont 81300 Graulhet, France
Telephone: + 33 (0) 563 421441
Fax: + 33 (0) 563 423518

SPAIN

Juan José Albarracín SA
(producers of paprika, oil-resins and saffron)
Address: P.O. Box 52, 30100 Espinardo, Spain
Telephone: + 34 (0) 968 879504
Fax: + 34 (0) 968 83 55 78
E-mail: jjalbarracin@jjalbarracin.com
Internet: www.jjalbarracin.com

Angel Jobal, SA
(importer /grinder / distributor of spices)
Address: C. Princesa 38, Apartado Postal, 08003 Barcelona, Spain
Telephone: + 34 (0) 933 197802
Fax: + 34 (0) 933 102306

Jose Martinez Y Cia SA
(grinder / blender / packer of paprika)
Address: Ctra archena s/n 30564 lorquí, Spain
Telephone: + 34 (0) 968 690061
Fax: + 34 (0) 968 69 00 86

Matencio Lopez SA
(importer / grinder / packer of spices)
Address: Camino Viejo de Monteagudo 38, P.O. Box 4051, San Ginés Murcia
Telephone: + 34 (0) 968 882696
Fax: + 34 (0) 968 882694

Juan Navarro García SA
(packer of pepper)
Address: Polígono Industrial Cabezo Cortado s/n, 30100 Espinardo (Murcia), Spain
Telephone: + 34 (0) 968 306102
Fax: + 34 (0) 968 835830
Internet: www.juannavarro.com

Luis Penalva SL
(importer / packer / distributor of spices and herbs)
Address: Pl. de la Magdalena 113, 03660 Novelda (Alicante), Spain
Telephone: + 34 (0) 965 600292
Fax: + 34 (0) 965 606086
E-mail: chiquilin@chiquilin.com
Internet: www.chiquilin.com

Manufacturas Taberner SA
(imports spices and herbs for production of meat products)
Address: Autovía A-3 Madrid-Valencia Km. 343, 46930 Quart de Poblet (Valencia), Spain
Telephone: + 34 (0) 961 597380
Fax: + 34 (0) 961 920659
E-mail: taberner@taberner.es
Internet: www.taberner.es

THE NETHERLANDS

Van Amstel, Visser & Co
(importer of vanilla)
Address: P.O. Box 2, 8330 AP Steenwijk, The Netherlands
Telephone: + 31 (0) 521 514040
Fax: + 31 (0) 521 511112
E-mail: info@amstelvisser.nl
Internet: www.amstelvisser.nl

Argolanda
(importer of hides, skins, spices)
Address: P.O. Box 45, 3000 AA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2800000
Fax: + 31 (0) 10 4045794
E-mail: info@argolanda.nl
Internet: www.argolanda.nl

Pietercil Barends B.V.
(importer of herbs and spices from South Africa and processor of sauces)
Address: Bleiswijkseweg 51, 2712 PB Zoetermeer
Telephone: + 31 (0) 79 3441100
Fax: + 31 (0) 79 3420831
E-mail: pietercil_barends@pietercil.com

Blok BV
(processor / packer of spices and herbs for butchers / food industry)
Address: P.O. Box 1497, 1300 BL Almere, The Netherlands
Telephone: + 31 (0) 36 5372480
Fax: + 31 (0) 36 5372019

B. Buttner & Co
(importer of desiccated coconut and small quantities of spices)
Address: P.O. Box 270, 2920 AG Krimpen aan de IJssel, The Netherlands
Telephone: + 31 (0) 180 550055
Fax: + 31 (0) 180 550432
E-mail: buttner@euronet.nl

Catz International B.V.
(leading multinational trader / importers of spices and herbs)
Address: P.O. Box 180, 3000 AD Rotterdam, The Netherlands
Telephone: + 31 (0) 10 4113440
Fax: + 31 (0) 10 4118913
E-mail: info@catz.nl
Internet: www.catz.nl

Curaçaosche Trading Company
(CTC Holding B.V.)
(broker in Indonesian seeds and spices, selling to world-wide importers)
Address: P.O. Box 525, 1110 AM Diemen, The Netherlands
Telephone: + 31 (0) 20 3140700
Fax: + 31 (0) 20 3140706
E-mail: ctchold@worldonline.nl

Van Eeghen International B.V.
(major importer of herbs and spices)
Address: P.O. Box 3699, 1001 AL Amsterdam, The Netherlands
Telephone: + 31 (0) 20 6249090
Fax: + 31 (0) 20 6222764
E-mail: info@vaneeghen.com
Internet: www.vaneeghen.com

Epos Specerijen
(small blender of spices and herbs for food industry and butchery trade)
Address: Ringvaartweg 10, 1948 PE Beverwijk, The Netherlands
Telephone: + 31 (0) 251 229103
Fax: + 31 (0) 251 220660

Euroherb B.V.
(leading importer / trader organic spices and herbs)
Address: Dynamostraat 12, 3903 LK Veenendaal, The Netherlands
Telephone: + 31 (0) 318 543288
Fax: + 31 (0) 318 542458
E-mail: euroherb@euroherb.nl
Internet: www.euroherb.nl

Euroma Netherlands BV
(importer / blender / packer of spices and herbs of the brands Euroma and Spice Islands)
Address: P.O. Box 4, 8190 AA Wapenveld, The Netherlands
Telephone: + 31 (0) 38 4473563
Fax: + 31 (0) 38 4473560
E-mail: cs@euroma.nl

Holland Produce BV
(small importer of spices and herbs)
Address: P.O. Box 777, 1440 AT Purmerend, The Netherlands
Telephone: + 31 (0) 299 471041
Fax: + 31 (0) 299 471901

Jacob Hooy & Co BV
(importer / processor / packer of spices and herbs)
Address: P.O. Box 72,
1906 ZH Limmen, The Netherlands
Telephone: + 31 (0) 72 5052744
Fax: + 31 (0) 72 5053383
E-mail: jacob.hooy@tiscali.nl
Internet: www.jacobhooy.n

Huijbregts Groep
(major importer / processor / packer of spices and herbs)
Address: P.O. Box 165,
5700 AD Helmond, The Netherlands
Telephone: + 31 (0) 492 541415
Fax: + 31 (0) 492 550540
E-mail: verkoop@huijbregts.nl
Internet: www.huijbregts.nl

Molukken Industrie en Handelsmaatschappij BV
(importers of spices, pulses, herbs, pudding powder)
Address: P.O. Box 10,
3100 AA Schiedam, The Netherlands
Telephone: + 31 (0) 10 4730366
Fax: + 31 (0) 10 4730901
E-mail: molukspices@planet.nl

Inproba BV
(manufacturer of Chinese and Indonesian products)
Address: P.O. Box 38,
3740 AA Baarn, The Netherlands
Telephone: + 31 (0) 35 5429922
Fax: + 31 (0) 35 5421691
E-mail: inproba@export.nl

Jadico Specerijen BV
(small importer / processor of spices and herbs)
Address: P.O. Box 11251,
3044 AV Rotterdam, The Netherlands
Telephone: + 31 (0) 10 4626600
Fax: + 31 (0) 10 4626960
E-mail: info@jadico.nl
Internet: www.jadico.nl

M.P. van Jinnelt B.V.
(broker buying and selling coffee and spices)
Address: P.O. Box 390,
1400 RJ Bussum, The Netherlands
Telephone: + 31 (0) 35 6917200
Fax: + 31 (0) 35 6949036

Van der Knoop N.V.
(importer of spices and herbs, chiefly basilicum, bay leaves and other herbs)
Address: P.O. Box 9,
3100 AA Schiedam, The Netherlands
Telephone: + 31 (0) 10 4264630
Fax: + 31 (0) 10 4860928

Man Producten BV
(leading multinational importer / trader in spices and herbs)
Address: P.O. Box 253,
3000 AG Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2801380
Fax: + 31 (0) 10 4147550
E-mail: mail@manproducten.nl
Internet: www.edfman-spices.com

J.S. Polak Kon. Specerijmaalderij BV
(importer / processor of spices and herbs for bakery and retail trade)
Address: P.O. Box 2,
8330 AA Steenwijk, The Netherlands
Telephone: + 31 (0) 521 514040
Fax: + 31 (0) 521 511112
E-mail: info@polak.nl
Internet: www.polak.nl

Van Sillevoldt BV
(importer / processor of spices and herbs, packers of the Silvo retail brand)
Address: P.O. Box 64,
3350 AB Papendrecht, The Netherlands
Telephone: + 31 (0) 78 6151755
Fax: + 31 (0) 78 6153107
E-mail: info@silvo.nl
Internet: www.silvo.nl

Steensma B.V.
(importer / processor / packer of candied fruits and spices & herbs for bakery and wholesale trade)
Address: P.O. Box 326,
8901 BC Leeuwarden, The Netherlands
Telephone: + 31 (0) 58 2881129
Fax: + 31 (0) 58 2880806
E-mail: info@steensmabv.nl
Internet: www.steensmabv.nl

Unifine Industry BV
(large importer / processor and trader of spices and herbs)
Address: P.O. Box 5631,
3297 ZB Puttershoek, The Netherlands
Telephone: + 31 (0) 78 6762344
Fax: + 31 (0) 78 6762870
E-mail: sales@unifine.com
Internet: www.unifine.nl

Verstegen Spices & Sauces BV
(major trader of spices and herbs)
Address: P.O. Box 11041,
3004 EA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 4155100
Fax: + 31 (0) 10 4624707
E-mail: info@verstegen.nl
Internet: www.verstegen.nl

UNITED KINGDOM

Bart Spices Ltd
(importer and manufacturer of (organic) spices and herbs)
Address: York Road, Bedminster,
Bristol BS3 4AD, United Kingdom
Telephone: + 44 (0) 1179 773474
Fax: + 44 (0) 1179 720216
E-mail: bartspices@bartspices.com
Internet: www.bartspices.com

British Pepper and Spice
(supplier of retailer branded herbs)
Address: Rhosili Road, Brackmills,
Northampton NN4 7AN, United Kingdom
Telephone: + 44 (0) 1604 766461
Fax: + 44 (0) 1604 763156
Internet: www.britishpepper.co.uk

Foxs Spices Ltd
(importer / wholesaler of spices)
Address: Units J-K Masons Rd Ind Est,
Stratford Upon Avon,
Warwickshire CV37 9NF, United Kingdom
Telephone: + 44 (0) 1789 266420
Fax: + 44 (0) 1789 267737

McCormick (UK) Ltd
(blender / processor / packer and distributor of the brand Schwartz)
Address: Thame Road, Haddenham,
Buckinghamshire HP17 8LB,
United Kingdom
Telephone: + 44 (0) 1844 292930
Fax: + 44 (0) 1844 294294
Internet: www.schwartz.co.uk

The Organic Herb Trading Co.
(importer / processor / distributor of organic herbs)
Address: Court Farm, Milverton,
Somerset TA4 1NF, United Kingdom
Telephone: + 44 (0) 1823 401205
Fax: + 44 (0) 1823 401001
E-mail: info@organicherbtrading.com
Internet: www.organicherbtrading.co.uk

Universe Foods Limited
(importer / distributor of spices and other ingredients)
Address: Universe House, 52 Queens Road,
Weybridge, Surrey KT13 0AN,
United Kingdom
Telephone: + 44 (0) 1932 838100
Fax: + 44 (0) 1932 859912
E-mail: ingredients@universe-foods.co.uk
Internet: www.universe-foods.co.uk

APPENDIX 12 USEFUL INTERNET LINKS

www.spizes.com
Aims to interact electronically with suppliers, customers, specialists and distributors in the spice industry. This Internet site offers global commercial services for the spice industry, such as market and price reports, spice encyclopaedia and several online activities, including an online auction and quality testing
(Language: English).

www.foodfirst.co.uk
This Internet site offers you a lot of useful information on speciality foods including daily recipes, masterclasses and a directory of thousands of producers, wholesalers, retailers and services suppliers
(Language: English).

www.foodingredientsonline.com
A portal site where you can get yourself listed as a supplier of spices / herbs and sign up for a free newsletter. It also offer current headlines, information on market research reports and several other services in the field of food ingredients business
(Language: English).

www.indianspices.com
The Internet site of the Indian Spices Board offers a lot of useful information (particularly for developing country exporters), including an export section, quality assurance (including European quality standards), domestic and international prices and information about organic certification
(Language: English, Hindi).

www.ifoam.org
Web site of the International Federation of Organic Agriculture Movements. Information on fairs, projects, events, regulations, reports and magazines on organic agriculture. Also provides links to other international organisations and databases including a collection of Country Reports on Organic Agriculture
(Language: English).

www.herbs.org
The Internet site of the Herb Research Foundation is a source of science-based information on the health benefits and safety of herbs, and expertise in sustainable botanical resource development. Services include botanical literature research, publications, herb safety reviews, headlines, and Herb Information Packets
(Language: English).

www.ipcnet.org
The International Pepper Community (IPC) is an intergovernmental organisation, consisting of six pepper producing countries namely Brazil, India, Indonesia, Malaysia, Sri Lanka, and Papua New Guinea.
The Internet site offers several publications (Prices Bulletin Pepper, Pepper Market Review, etc.), statistics on the international pepper market, links to (European) associations and product-specific information
(Language: English).