

The Market for
Cinnamon & Cassia
in the European Union

ITC



INTERNATIONAL TRADE CENTRE UNCTAD WTO

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Prepared by Dr Peter Martin Jaeger
peter@jaeger.sonnetco.uk

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ABBREVIATIONS

AFNOR	Association Française De Normalisation
BSI	British Standards Institute
CIF	Cost insurance and freight
CN	Combined nomenclature of the European Union
ESA	European Spice Association
EU	European Union (currently 15 member countries)
EURO STAT	Statistical Office of the European Union
FAO	Food and Agriculture Organization of the United Nations
FOB	Free on board
H S	Harmonized System nomenclature
ISO	International Standards Organization
ITC	International Trade Centre UNCTAD/WTO
SITC	Standard International Trade Classification

GLOSSARY

Chips

Dried pieces of cinnamon bark, including the outer bark

Featherings

Pieces of inner bark obtained from small twigs and shoots of cinnamon

Foxing

Dark patches on the surface of cinnamon quills

Quills

Scraped peel of the inner bark of shoots of cinnamon or cassia that have been rolled into hollow tubes. The preparation varies according to origin. The tubes may be single or compound and in cinnamon are filled with pieces of the same peel

Quillings

Broken pieces of cinnamon quills

Scraped/Unscraped

The inner peel may be scraped with a curved knife to remove any remains of piperitis, cork or inner cortex.

EXECUTIVE SUMMARY

Cinnamon, and the related spice cassia, are well-known flavours in Europe. The sweet tones of the aroma, with suggestions of clove and citrus in cinnamon and a slightly spicy tone in cassia, marry well with the European taste for sweet baked goods, confectionery and fruit preparations. There are strong seasonal associations with the flavour, and it is popular in Christmas cakes and winter drinks as well as in year-round products such as teas and infusions.

Consuming countries of the EU have shown preferences for particular types and grades of cassia and cinnamon. These preferences are determined by the distinguishing characteristics of each type (e.g. oil content, aroma, etc) and its corresponding use in the industry as well as by the going price – this was demonstrated during the 1990s when Indonesian output rose substantially as producers increased exports to offset the loss of income through a devaluing rupiah. Prices for the Indonesian grades, once the most expensive type of cassia, declined due to the volume of cassia available to the market. Consequently, the low prices of the Indonesian cassia relative to the other types contributed to a growth in market share for the Indonesian exporters.

Imports into the EU indicate a market increasingly focussed on the Indonesian type of cassia while imports of true cinnamon, and the Vietnamese and Chinese grades of cassia are in decline. Overall, European imports of cinnamon and cassia reached 12,000 tonnes in 1999, in a market that is increasingly focused on price. The challenge for exporters is to position themselves with a product offering corresponding to niche opportunities in line with local preferences and customs in various European countries.

A. PRODUCT DESCRIPTION

This Market Brief covers the spices cinnamon and cassia, listed under the following codes:

H S	09.06.10	Cinnamon and cinnamon-tree flowers (excluding crushed and ground)
SITC3	075.22	

H S	09.06.20	Crushed or ground cinnamon and cinnamon-tree flowers.
SITC3	075.23	

The products that will be covered are known commercially as cinnamon and cassia, which are the barks of various species of the genus *Cinnamomum*.

In particular, this Market Brief refers to:

- cinnamon, being the bark of *Cinnamomum zeylanicum* Blume harvested in Sri Lanka, Madagascar and the Seychelles
- cassia, being the bark of *Cinnamomum cassia* (Nees) ex Blume, *Cinnamomum burmannii* (C G Nees) Blume and *Cinnamomum loureirii* Nees.

Dealers in the spice trade distinguish cinnamon and cassia products by species, origin, preparation and grade, and there are notable market preferences for different types. An outline is given here, but additional information on the specifications for each type and the grades can be found in two International Standards – ISO 6538 and ISO 6539 (refer to the International Standards Organisation listed under 'Other organizations').

Cinnamon

Cinnamomum zeylanicum Blume is cultivated or harvested in South Asia, Mexico and South America.

Sri Lankan Type

This is the dried bark of *C. zeylanicum* cultivated in Sri Lanka. The bark is commercialised as quills, quillings, feather rings and chips as well as in the ground form. The quills are graded into a number of different categories, namely Alba, Continental, Mexican and Hamburg and these in turn are further subdivided. The principal criteria for classification are the diameter of the quills (from 6mm in the Alba grade to 38mm in the Hamburgs) and the extent of foxing (dark brown or reddish brown patches on the surface of the quills).

Seychelles Type

Cinnamon bark from cultivation in the Seychelles is commercialised in three forms: as rough pieces (scraped or notscraped), quills and quillings.

Madagascan Type

Madagascan cinnamon is harvested from trees growing wild and may be sold scraped or notscraped as simple hollow tubes or as pieces.

Cassia

Chinese Type (C. cassia (Nees) ex Blume)

Chinese cassia is harvested in southern China. It is presented in pieces, scraped or notscraped, from 25 to 38cm long and about 2cm in diameter. The bark thickness varies from 3 to 6mm. It has a sweet and aromatic flavour that may be somewhat astringent. Three classes are recognised: 1. Kantung cassia (China rolls or Canton rolls), 2. Kwangsi cassia and 3. broken pieces. The Kantung cassia is brownish grey and rough if notscraped, and light reddish brown and smooth when scraped. The Kwangsi cassia is not as rough as Kantung cassia and has a stronger and richer flavour.

Indonesian Type (C. burmanii (C G Nees) Blume)

Indonesian cassia is harvested mostly on the island of Sumatra but production extends eastwards through Java to Sulawesi and beyond. It is presented as single or double quills approximately 1m long made from strips of bark 5 to 10cm wide and 1 to 5mm thick. At least two sub-types are recognised: Korintje is harvested at higher altitudes and is a deep reddish brown, while Vera (Java or Batavia) is lighter and harvested from lower elevations. Indonesian cassias are classified by four grades. The premium grade 'AA' is fully scraped and palest in colour, while grades 'A' and 'B' are darker. Grade 'C' refers to broken pieces. The premium grades are taken from the main trunk of the tree while B quality is harvested from the side branches.

Vietnamese Type (C. loureirii Nees)

The Vietnamese type is a greyish-brown bark in single or double quills. Each quill is 15 to 30cm long, 10 to 38mm in diameter and up to 6mm thick. The whole barks are classified into thin, medium and thick grades and there is a grade for broken pieces.

B. PRODUCTION, CONSUMPTION AND FOREIGN TRADE

Production

Main producers of cinnamon are Sri Lanka, Seychelles, and Madagascar. While there has been little change in cinnamon output during the period 1980-2000, Madagascar has produced progressively less in the last ten years, whereas output originating from the other two main producers has increased. In 2000, Sri Lanka supplied over 86% of the 13,950 tonnes of cinnamon produced globally. As concerns cassia, there was strong growth in production (50% increase between 1990-2000 from the main producers: China, Indonesia and Viet Nam), with a total of over 76,000 tonnes produced in 2000 alone (refer to Table 1 for details).

Table 1 - Estimated output in the principal producing countries

Products	Origins	1980	1985	1990	1995	2000
Cinnamon						
	Sri Lanka	10,582	9,722	10,453	12,000	12,000
	Seychelles	620	930	180	620	450
	Madagascar	695	1,000	2,000	1,700	1,500
	Sub-total	11,897	11,652	12,633	14,320	13,950
Cassia						
	China	8,000	18,000	20,000	25,000	31,500
	Indonesia	11,395	21,745	26,507	37,334	39,833
	Vietnam	700	1,200	3,200	4,400	4,800
	Sub-total	20,095	40,945	49,707	66,734	76,133
World Total		32,032	52,638	62,446	81,193	90,213

Units: tonnes

Source: FAO (<http://apps.fao.org>)

Minor producers are not detailed in Table 1, but are included in the World Total.

Foreign trade

The data in this section describe the trade in cinnamon and cassia into and within Europe. However, the data must not be taken as definitive since there are recognised inaccuracies in reporting, and no account is taken of re-exports of cinnamon and cassia in processed form, either as oleoresins or in prepared foods.

Imports

Table 2 (below) indicates that most cinnamon and cassia is imported into the European Union (EU) in the whole form. Grinding generally shortens the shelf-life of spices, as the volatile oils are easily lost. Overall, total imports of the two spices have grown by 50% since 1995.

Table 2 - Imports of Cinnamon and Cassia into the European Union

Form	1995	1996	1997	1998	1999
Whole	7,111	7,270	7,334	9,898	11,033
Crushed or Ground	921	1,287	1,452	1,146	1,133
Total	8,032	8,557	8,786	11,044	12,166

Units: tonnes

Source: EURO STAT

Despite the increase in imports into the European Union, there has been no significant increase in cross border trade within the European Union, indicating that most cinnamon and cassia is imported directly from origin.

The data in Table 3 (below) reflect the relative importance of the different types of cinnamon and cassia in the EU trade. In addition, as the Harmonised System of trade classification does not distinguish between cinnamon and cassia, the breakdown of the statistics is based on the origin of imports.

Table 3 - Origin of Cinnamon and Cassia Imports into the European Union

Type s	Origin	1995	1996	1997	1998	1999
Cinnamon	Seychelles	463	624	473	348	303
	Madagascar	966	458	578	549	389
	Mayotte	75	37	14	33	0
	Sri Lanka	934	926	911	1,021	973
	Sub-total	2,438	2,045	1,976	1,951	1,665
Cassia	Vietnam	523	686	682	723	484
	Indonesia	4123	4425	4560	7085	8940
	China	703	1131	1025	773	598
	Sub-total	5,349	6,242	6,267	8,581	10,022
Unidentified Types	Thailand	0	4	5	17	36
	USA	32	83	363	333	274
	Singapore	86	56	87	55	47
	Hong Kong	15	14	10	19	24

Units: tonnes

Source: EURO STAT

Imports from Thailand are mostly of the ground product. Imports from the trading centres of the USA, Singapore and Hong Kong cannot be reliably identified to type, although it is likely that the Hong Kong merchandise is the Chinese type cassia, while the Singapore exports are probably primarily Indonesian type cassia.

Cinnamon imports are declining, with arrivals from the Seychelles and Madagascar falling over the last five years. Imports of cassia, however, have almost doubled in the same period, suggesting a move by buyers towards using cassia in place of cinnamon. Table 4 is based on data reported on imports from the major origins – Sri Lanka, the Seychelles and Madagascar. The figures slightly underestimate the demand, as trade in cinnamon within the EU cannot be identified. The UK and Spain lead the imports. While imports into the Netherlands and France are falling, those of Germany and Italy are more stable. Italy and Spain are particularly dependent on Sri Lankan supplies.

Table 4 - Destination of Cinnamon imports into the European Union (from Sri Lanka, Seychelles, Mayotte and Madagascar)

	1995	1996	1997	1998	1999
France	278	232	212	166	125
Netherlands	385	175	136	90	117
Germany	388	360	383	379	274
Italy	184	136	147	178	181
United Kingdom	660	635	617	637	445
Spain	489	472	416	435	493
Others	54	3	65	66	30
Total EU-15	2,438	2,045	1,976	1,951	1,665

Units: tonnes

Source: EURO STAT

Table 5 shows the waning interest in Europe in Chinese cassia. Recently, imports have fallen rapidly.

Table 5 - Destination of Chinese Cassia imports into the European Union

	1995	1996	1997	1998	1999
France	186	278	200	173	187
Germany	122	152	204	136	86
United Kingdom	164	285	325	261	218
Greece	67	94	88	28	14
Portugal	68	49	89	116	59
Others	96	273	119	59	34
Total EU-15	703	1,131	1,025	773	598

Units: tonnes

Source: EURO STAT

Table 6 demonstrates the dominant position of the Indonesian types of cassia in the European market. Imports into the Netherlands have grown rapidly.

Table 6 - Destination of Indonesian Cassia imports into the EU

	1995	1996	1997	1998	1999
France	101	202	160	228	251
Netherlands	2,357	2,356	2,623	4,749	6,828
Germany	835	928	926	868	752
United Kingdom	51	100	68	177	190
Denmark/Sweden/Finland	440	452	380	493	375
Greece	185	320	230	327	332
Spain	48	18	82	94	102
Others	106	49	91	149	110
Total EU-15	4,123	4,425	4,560	7,085	8,940

Units: tonnes

Source: EURO STAT

Table 7 indicates the minor role of Vietnam type cassia in Europe although it is the preferred type in the United States.

Table 7 - Destination of Vietnamese Cassia imports into the EU

	1995	1996	1997	1998	1999
Netherlands	414	481	439	582	379
Germany	100	168	228	129	101
Others	9	37	15	12	4
Total EU-15	523	686	682	723	484

Units: tonnes

Source: EURO STAT

Consumption

Cinnamon and cassia are used for flavouring in domestic cooking and in food and drink manufacturing. Mostly, they enter international trade as whole barks that may be rolled into single or double tubes known as quills, but there is also trade in the pieces of bark and the ground form. Oleoresins are produced for the food industry as a form of the spice that is easier to handle in the manufacturing processes. Oils are distilled from cinnamon bark and/or leaf as well as from cassia bark.

Table 8 (below) indicates the net imports of cinnamon and cassia into the EU member states. The apparent consumption is calculated by deducting exports from the total imports into each country. However, as noted above, re-exports of the product in the processed form have not been accounted for.

Table 8 - Net Imports (apparent consumption) of Cinnamon and Cassia - whole and ground

	1995	1996	1997	1998	1999
France	604	633	548	560	582
Netherlands	1,786	1,451	1,604	3,555	4,590
Germany	1,682	2,084	2,316	2,275	1,993
Italy	313	288	265	299	294
UK	1,423	1,156	1,201	1,350	1,094
Denmark /Sweden/Finland	859	984	877	905	896
Greece	275	395	307	342	356
Spain	536	526	558	581	627
Portugal	197	201	238	301	183

Units: tonnes

Source: EURO STAT

The Netherlands has grown to dominate the trade in these products over the passed five years. Germany and the United Kingdom are also major consumers, although their consumption dipped substantially in 1999.

C. MARKET CHARACTERISTICS

Cinnamon and cassia are well known flavours in European foods. Both have a sweetish aroma that is modulated in cinnamon by notes of clove and citrus while the tone in cassia is somewhat spicy. These marry well with the European taste for sweet baked goods, confectionery and fruit preparations, breakfast cereals and puddings. There is also a substantial demand for cinnamon teas and infusions. Not surprisingly, there are relatively strong seasonal associations to the flavour of cinnamon and cassia with Christmas cakes, pastries and spiced wines.

The relative demands of different markets for particular types of cinnamon or cassia depend on the flavour and the traditions in the national cuisine. As shown in the statistics above, the United Kingdom and Spain have a marked preference for cinnamon, possibly for use in cola production; whereas the German market consumes more cassia. The German preference for cassia has long been associated with confectionery, particularly in chocolate flavouring. To this end, the Vietnamese type is more appropriate as it is spicier and less mucilaginous than the Indonesian product.

The most popular grade of cassia in Europe today is probably the Korintje B style of Indonesian cassia, which is well suited to the common uses of the ground spice. The Indonesian types are less bitter or astringent than the other cassias and closer in aroma and flavour to the Sri Lankan cinnamon, which was traditionally the preferred flavour in Europe.

Grinders, blenders and the end-users mix different types of cassia to achieve the required flavour. So a recipe may be based on the Korintje B grade, but require additional input from, for example, Vera A grades to add a level of sweetness. Note that colour may also be important and, therefore, the grinder must balance the cheaper blends with other types so as to achieve the preferred bright brown colours. The national differences in preference for particular cinnamon or cassia types are changing. In general, the most important issue in purchasing has become price, and the EU market appears to be progressively less segmented and more uniform. As cinnamon prices move up and cassia prices move down, cinnamon imports are in decline. Where the Indonesian cassia was once the most expensive of the three types of cassia, it is now the cheapest and the import data show a move away from the Chinese and Vietnamese types.

D . MARKET ACCESS

Tariffs

Cinnamon and cassia, in the whole form or ground, enter the European Union free of any import duties and quotas.

Regulations

The harmonisation of legislation across the EU has simplified the entry and circulation of goods into the EU, and tariffs are gradually being reduced. However, a second generation of issues in food regulation is now appearing, in for example:

- Labelling
- Food additives
- Pesticides and contaminants
- Packaging waste
- Hygiene
- Organic products
- Standards
- Phytosanitary questions
- Ethical issues.

Specifications & Standards

Established origins have developed a grading system and terminology that is accepted and understood in the destination markets. New exporters within these origins should follow the same systems. The most complex and elaborate is the Sri Lankan grading of the cinnamon quills.

For the markets, the quality of imported cinnamon and cassia is principally appraised in the appearance and the oil content, usually a minimum of 1.8%. The appearance of the whole product, particularly in the quills, is more important for the retail market, whereas the extraction industries are primarily concerned with oil content.

While there are national standards that apply in different markets, generally they are based on those of the International Standardisation Organisation, which in turn is based on the classification systems developed by the origins. References for these standards can be found in the 'List of Sources' section at the end of this Brief. It is however, more important to match the customer's requirements.

The European Spice Association has developed a list of Quality Minima for spices (see Annex 1).

E. PRICES

Table 9 has been calculated from the EU import data to give an indication of CIF values over time for different origins. These are not real prices, and there may be inaccuracies in reporting, but they do indicate trends.

Table 9 - Unit Import Value of Cinnamon and Cassia Bark

Product	Origin	1995	1996	1997	1998	1999
Cinnamon	Seychelles	1.14	1.16	1.21	1.51	1.47
	Madagascar	1.14	1.12	1.17	1.41	1.07
	Mayotte	1.77	1.68	1.33	1.41	
	Sri Lanka	2.85	2.97	3.69	4.74	5.33
Cassia	Vietnam	1.03	0.89	0.98	0.92	0.94
	Indonesia	1.72	1.71	1.52	1.08	0.93
	China	1.34	1.18	1.19	1.19	1.11

Units: ECU/kg

Source: Calculated from EURO STAT

1 ECU/USD for 1995-1999 respectively: 1.308, 1.270, 1.134, 1.121, and 1.066

The figures indicate:

- The relative value of the different types - Sri Lankan cinnamon is the highest value of the products while Indonesian and Saigon cassia have the lowest value.
- The falling value of Cassia - the abundant supplies of Indonesian types have depressed prices. Chinese cassia has held its value better.
- The increasing value of Sri Lankan cinnamon

The figures fail to take into account the substantial differences in prices for different grades of each product. The fall in Indonesian values is in part a consequence of the increasing output of lower grade material, which lowers the average value irrespective of the structure of the market.

The Market News Service of the ITC and the Public Ledger publish up-to-date quotes for vanilla in a number of markets (for details see 'List of Sources'). These are useful for monitoring current conditions, but have less relevance from a historical perspective due to the speculative nature of the trade.

Values quoted by the Market News Service for late 2000 were as follows:

Origin	Grade	US\$/tonne
Indonesia:	veraa cuttings	890
	veraa cuts	780
	kasticks	795-710
	kablc	680-670
	kblbc	560-540
Vietnam	4% oil	1700
	3%	1200
	2%	925
	1%	580

These prices are for nearby availability.

F. DISTRIBUTION CHANNELS

It is mostly dealers located in London, Rotterdam and Hamburg that handle the import of cinnamon and cassia. End-users may also buy directly from origin; however, they often prefer to let the trading companies carry the risks and the stocks. There is little second-hand trade in cinnamon or cassia.

G. PACKAGING and LABELLING

Most standards, both national and international, require the spice to be packed in clean and hygienic materials which do not interact with the product and which protect it from both moisture pick-up and loss of essential oils.

The nature and characteristics of the packaging are not always specified, but rather left to the buyer and seller. The only exception relates to packaging material of jute or sisal in which case the European Spice Association (ESA) specification states that this type of packaging should conform to CAO BISCO Standard Reference C502-51-sj.

Current national packaging standards should be verified – for example, there is a French standard V32 for selected spices including cinnamon.

Guidance on the packaging and marking of cinnamon is available in the 1997 revised ISO standard No. 6539.

Typically, the weight of each package, or bale, varies according to the origin:

- Sri Lankan cinnamon is packed in cylindrical bales of approximately 45 kg
- Madagascar and Seychelles cinnamon bales are approximately 50 kg
- Indonesian cassia bales are 50 or 60 kg while Vietnamese cassia bales are 30 or 60 kg.

It is always important to establish the packaging requirements of the purchaser before entering into a commitment to trade.

Labelling requirements usually include :

- Name of the product
- Name and address of producer or packer
- Date of packing
- Net mass (kg)
- Country of origin
- Code or Batch number
- Year of harvest
- Details of any special treatment
- Any other information requested by the purchaser

II . SALES PROMOTION

As a general rule, end-users do not buy directly from origin so as to minimise risk as well as to avoid carrying expensive stock. Any marketing effort directed at the users must be prepared to hold stock in the destination market to allow regular draw down of supplies.

An exporter should be prepared to visit target markets with samples in order to establish contact. Once there is a good contact, a flow of information should be maintained in both directions, with the exporter ensuring that the purchaser is up-to-date with progress in the production season.

A visit to a European trade fair can provide the exporter with valuable knowledge of the trade beyond his immediate experience as well as introducing new contacts. In particular, trade fairs can give insight to competitors' capabilities and the market issues of the moment.

Note that the exhibitors are generally sales orientated and less likely to be discussing their purchasing requirements.

Exhibiting at a trade show can provide an excellent showcase, but must be done properly for a positive effect. While the expense may be beyond the means of individual exporting companies, a co-operative effort between companies, or as a trade association, can divide the costs to a more manageable level.

The following trade fairs & exhibitions are the main events of interest to EU spice imports:

Title	Country	Month	URL & mail
Alimentaria	Spain / Portugal	March – Annual	alim.lisboa@mifiberia.es
ANUGA	Germany	Oct – Biennial	anuga@koelnmesse.de
Biofach	Germany	Annual	www.biofach.de
European Ethnic Food, Drink, Restaurant and Catering	UK	Annual	www.europeanethnicfood.co.uk
Food Ingredients – Europe	UK (2001) but location varies	Biennial	www.foodevents.com
IFE	UK	March – Biennial	www.ife.co.uk
SIAL	France	Oct biennial	www.sial.fr/index.htm

I. MARKET PROSPECTS

The demand for cinnamon is forecast to gradually reduce in Europe. There are increasing problems with output in the Seychelles and in Madagascar and the price of the Sri Lankan product continues to rise. With much cheaper substitutes available, the demand for cinnamon as a flavour will diminish. Further, as the European consumers move away from home preparation of foods towards more industrially prepared meals or away from home eating, there will be more emphasis on using cassia as a flavour. The reduction will not be indefinite however as some industrial users will continue to require cinnamon. The decorative use of cinnamon and its use in teas will also persist as a niche product.

The move in demand from cinnamon to cassia is unlikely to be fast enough or large enough to stimulate a price rise from the current low levels. The European trade is well stocked and the pipeline is full. Industries are now covering almost two years ahead as plentiful Indonesian supplies have weighed down the market. At these prices, the statistics suggest that users have moved away from the Chinese and Vietnamese types of cassia in favour of the Indonesian product. Among all producers there will be a reluctance to harvest until prices move up again.

The weakness of the rupiah has no doubt stimulated the current flow of Indonesian product into the market and has made the other origins less competitive. How long this situation will persist or indeed whether it will deteriorate is an unknown variable in the equation. Cassia has increasingly become a commodity market and it will become more difficult for exporters to distinguish their product other than by price.

J. IMPORTANT ADDRESSES

Importers

The following list provides contact details for some of the major importers and processors of cinnamon and cassia in Europe. A more complete list may be obtained from national trade associations.

No recommendation to trade is intended with this list, and all sellers are advised to make their own checks prior to entering into any financial commitments.

Germany (+ 49)	
Fuchs Gewürze GmbH Westring 15-17 D -49 201 Disse n	Te l: 054 21 30 9 0 Fax: 054 21 30 9 1 11 http://www.fuchs-gewuerze.de
Hamburg er Gewürz-Mühle Hermann Schulz GmbH Grossm ans trasse 221 D -20539 H am burg	Te l: 040 78 9 7 01 30 Fax: 040 78 9 7 01 31
Hermann Lau e GmbH Beim oorweg 11 D -229 23 Ahrensburg	Te l: 041 02 49 60 Fax: 041 02 49 61 04 http://www.he-la-food.de
Schwab GmbH Postfach 11 03 84 D -20403 H am burg	Te l: 040 36 49 71 Fax: 040 36 77 9 0
Netherlands (+ 31)	
Catz International BV PO Box 180 3000 AD Rotterdam	Te l: 10 411 3440 Fax: 10 411 89 13 http://www.catz.nl

Man Productie Rotterdam BV PO Box 253 3000 AG Rotterdam	Tel: 10 417 7377 Fax: 10 414 7550 http://www.manproductie.nl
Van Sille veldt BV PO Box 64 3350 AB Papendrecht	Tel: 78 615 1755 Fax: 78 615 3107
United Kingdom (+ 44)	
British Pepper & Spice Rhosili Road Brackmills Northampton NN4 7AN	Tel: 01604 766 461 Fax: 01604 763 156
Chambers & Knight Thames House 18 Park Street London SE1 9EL	Tel: 020 7357 7821 Fax: 020 7378 8582
De Hacroon Fooks & French Linton House 164-180 Union Street London SE1 0LH	Tel: 020 79 28 0404 Fax: 020 79 26 1238
McCormick Thames Road Haddenham Buckinghamshire HP17 8LB	Tel: 01844 29 29 30 Fax: 01844 29 4 29 4 http://www.cpd.mccormick.com
TChoiram & Sons Choiram House Lancelot Road Wembley Middlesex HA0 2BG	Tel: 020 89 03 8311 Fax: 020 89 00 1426

Trade associations

<p>EUROPE European Spice Association 6 Catherine Street London W C2B 5JJ England Tel: 44 (0)20 7836 2460 Fax: 44 (0)20 7836 0580</p>	<p>ITALY (+ 39) AIIFA - Associazione Italiana Industrie Prodotti Alimentari Corse di Porta Nuova 34 I-20121 Milan Tel: 02 65 41 84 Fax: 02 65 48 22</p>
<p>BELGIUM (+ 32) AFSPA Roode beekelaan 30 B-1030 Brussels Tel: (0)2 743 87 46 Fax: (0)2 736 81 75</p>	<p>NETHERLANDS (+ 31) Nederlandse Vereniging voor de specerijhandel PO Box 64 3350 AB Papendrecht Tel: (0)78 615 17 55 Fax: (0)78 615 31 07</p>
<p>FRANCE (+ 31) Syndicat National des Transformateurs de Poivres, Epices, Aromates et Vanille 8, Rue de l'Isly F-75008 Paris Tel: (0)1 53 42 33 80 Fax: (0)1 53 42 33 81 Email: covip@wanadoo.fr</p>	<p>SPAIN (+ 34) Afe xpo Calle de Santa Catalina 13 E - 30004 Murcia Tel: (0)68 21 40 89 Fax: (0)68 21 96 77</p>
<p>GERMANY (+ 49) FACH VERBAND DER GEWÜRZINDUSTRIE E.V. Reuterstrasse 151 D -5300 Bonn 1 Tel: (0)228 21 61 62 Fax: (0)228 22 94 60</p>	<p>UNITED KINGDOM (+ 44) International General Produce Association Ltd Grafton House 6 Chapel Court London EC2A 3DQ Tel: (0)20 7814 9666 Fax: (0)20 7814 8383 http://www.igpa.com</p> <p>Seasoning and Spice Association 6 Catherine Street London W C2B JJ Tel: (0)20 7836 2460 Fax: (0)20 7836 0580</p>

Other organizations

<p>CBI Centre for the Promotion of Imports from Developing Countries P.O. Box 30009 3001 DA Rotterdam the Netherlands Tel: + 31 10 201 3434 Fax: + 31 10 411 4081 http://www.cbi.nl</p>	<p>ISO International Standardisation Organisation P.O. Box 56 CH -1211 Geneva Tel: + 41 22 749 01 11 Fax: + 41 22 733 34 30 http://www.iso.ch</p>
<p>CTA Technical Centre for Agricultural and Rural Co-operation P.O. Box 380 6700 AJ Wageningen the Netherlands Tel: + 31 Fax: + 31</p>	<p>ITC International Trade Centre Palais des Nations P.O. Box 10 1211 Geneva 10 Switzerland Tel: + 41 22 730 0111 Fax: + 41 22 733 4439 http://www.intracen.org</p>
<p>European Commission Rue de la Loi 200 B-1049 Brussels, Belgium Tel: + 32-2 299-1111 (switchboard) Fax: + 32-2 295-0138 /39 /40 http://europa.eu.int/com/index_en.htm</p>	<p>Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH Economic Development and Employment Promotion Dag-Hammarskjöld-Weg 1-5 Postfach 51 80 D - 65726 Eschborn Germany Tel: (0049 619 6) 79 1229 , 79 0 Fax: (0049 619 6) 79 6150 Email: jochem.lange@gtz.de URL: http://www.gtz.de</p>

K. LIST OF SOURCES

Publications:

- On-line book stores such as www.amazon.com, provide the best means of searching for subjects or titles.
- Spices - Volume 2 - (1987) Longman Group Ltd, Harlow, England
- Guidelines for Exporters of Spices to the European Union - Commonwealth Secretariat, London, UK
- Market Research File on Spices – Overview of the EU, Poland, Hungary, Czech Republic, Russian Federation - International Trade Centre, Geneva, Switzerland
- Dried Herbs & Spices – A Packaging Manual - (1999) International Trade Centre, Geneva, Switzerland
- Handbook of Spices, Seasonings, & Flavorings - (2000) Technomic Publishing Company, Inc, Lancaster USA

Periodicals:

Food News 80 Calverley Road Tunbridge Wells Kent TN1 2UN UK	Tel: + 44 (0)189 2 533 813 Fax: + 44 (0)189 2 511 803 http://www.agra-food-news.com
International Food Ingredients Miller Freeman BV PO Box 200 3600 AE Maarssen The Netherlands	Tel: + 31 (0)346 55 94 44 Fax: + 31 (0)346 57 38 11 http://www.mfbv.com
Marchés Tropicaux 190 Boulevard Haussmann 75008 Paris France.	Tel: + 33 (0)1 44 95 99 50 Fax: + 33 (0)1 44 95 99 79 http://www.marches-tropicaux.com
Market News Service International Trade Centre Palais des Nations P.O. Box 10 1211 Geneva 10 Switzerland	Tel: + 41 22 730 0111 Fax: + 41 22 733 4439 http://www.intracen.org
The Public Ledger 80 Calverley Road Tunbridge Wells Kent TN1 2UN UK	Tel: + 44 (0)189 2 533 813 Fax: + 44 (0)189 2 544 89 5 http://www.public-ledger.com

Standards:

ISO 6538:1997 Cassia, Chinese type, Indonesian type and Vietnamese type [Cinnamomum aromaticum (Nees) syn. Cinnamomum cassia (Nees) ex Blume, Cinnamomum burmannii (C.G. Nees) Blume and cinnamomum loureirii Nees]- Specification

ISO 6539:1997 Cinnamon, Sri Lankan type, Seychelles type and Madagascan type (Cinnamomum zeylanicum Blume)- Specification

(contact the International Standards Organisation listed under 'Other organisations').

Web sites:

Sites of interest often with good links to other sites, include:

- http://ipm_www.ncsu.edu/cmag/cem.html virtual library of agriculture
- <http://www.fintrac.com/gain/> wide range of horticultural information from production through to marketing
- <http://www.natural-products.net> useful address lists
- <http://www.raise.org> USAID funded initiative, providing market information and technical assistance to increase Rural and Agricultural Incomes with a Sustainable Environment
- <http://www.ucdavis.edu> Website of the University of Davis in California. Extensive publications and resources

ANNEX 1
EURO PEAN SPICE ASSOCIATION SPECIFICATIONS OF
QUALITY MINIMA FOR HERBS AND SPICES – CINNAMON AND CASSIA

Abbreviations: weight by weight (W/W), ash insoluble acid (AIA), volatile oil (VO), volume by weight (V/W)

SUBJECT	SPECIFICATIONS
Extraneous matter	Herbs 2%, Spices 1%
Sampling	(For routine sampling) Square root of units/lots to a maximum of 10 samples. (For arbitration purposes) Square root of all containers e.g 1 lot of pepper may = 400 bags, therefore square root = 20 samples.
Foreign Matter	maximum 2%
Ash	(ESA) maximum 7% W/W
Acid Insoluble Ash	(ESA) maximum 2% W/W
H ₂ O	(ESA) maximum 14% W/W
Packaging	Should be agreed between buyer and seller. If made of jute and sisal, they should conform to the standards set by CAO BISCO Ref C502-51 -sj of 20-02-95. However, these materials are not favoured by the industry, as they are a source of product contamination, with loose fibres from the sacking entering the product
Heavy Metals	Shall comply with national /EU legislation.
Pesticides	Shall be utilised in accordance with manufacturers' recommendations and good agricultural practice and comply with the existing national and/or EU legislation.
Treatments	Use of any EC approved fumigants in accordance with manufacturers' instructions, to be indicated on accompanying documents. (Irradiation should not be used unless agreed between buyer and seller).
Microbiology	Salmonella absent in (at least) 25g. Yeast & Moulds 10 ⁵ /g target; 10 ⁶ /g absolute maximum E Coli. 10 ² /g target; 10 ³ /g absolute maximum Other requirements to be agreed between buyer and seller.
Offodours	Shall be free from offodour or taste.
Infestation	Should be free in practical terms from live and/or dead insects, insect fragments and rodent contamination visible to the naked eye (corrected if necessary for abnormal vision)
Aflatoxins	Should be grown, harvested, handled and stored in such a manner as to prevent the occurrence of aflatoxins or minimise the risk of occurrence. If found, levels should comply with the existing national and /or EU legislation.
Volatile Oil	(ESA) Cassia: 1.0% V/W min; Cinnamon: 0.4% V/W min
Adulteration	Shall be free from.
Bulk Density	To be agreed between buyer and seller.
Species	To be agreed between buyer and seller.
Documents	Should provide: - details of any treatments the product has undergone; name of product; weight; country of origin; lot identification; batch number; year of harvest

Notes on Methodology Used in setting Standards

Please refer to the following methods when analysing products:

Moisture ISO 939

Total Ash ISO 928

Acid Insoluble Ash ISO 930

Volatile Oil ISO 6571

Co-ordinators of the European Spice Association are listed under 'Trade Associations'.