

Exporting cardamom to Europe

European demand for cardamom is slowly but steadily growing. Important European markets for cardamom are the United Kingdom, the Netherlands, Germany and Scandinavian countries. These countries use cardamom in several traditional recipes. Europe also has an increasing population of Asian descent interested in recipes containing cardamom.

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1. Product description

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

Both genera are imported into Europe. The cardamom pods of these different genera are graded according to their size and colour. Importers and processors can have different preferences regarding the grade of the cardamom. In general, the deeper the green colour and the larger the capsule, the higher the grade is.

Guatemala and India are the main producers of both small and large cardamom.

Cardamom is one of the most highly priced spices in the world. It is mainly used in:

- Ethnic cuisine (Indian and Middle Eastern)
- Health products (for more information, see [our studies of the European market for natural ingredients for health products](#))

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

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

2. What makes Europe an interesting market for exporters of cardamom?

The European market for cardamom is stable and demand is slowly growing

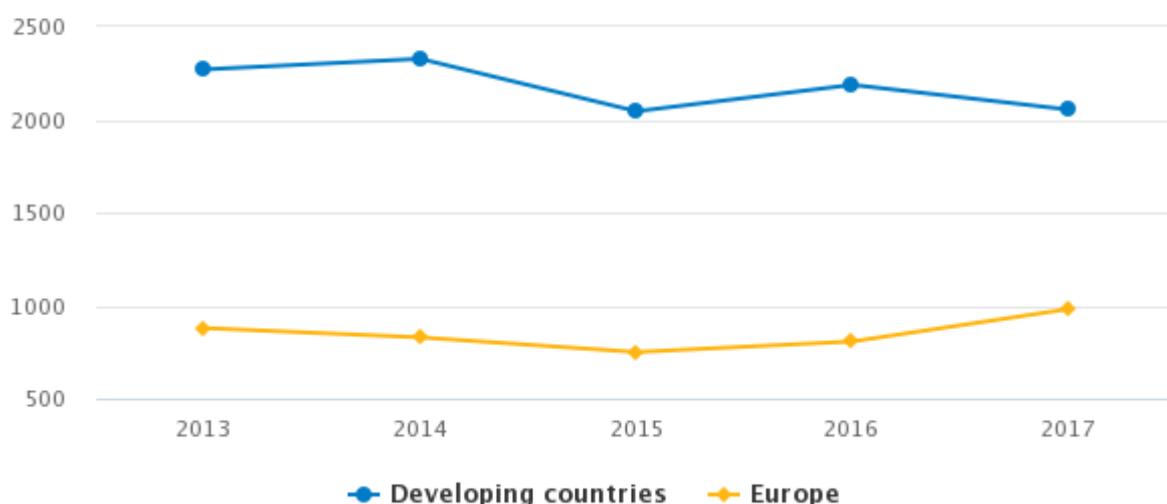
European imports directly sourced from developing countries slowly decreased between 2013 and 2017 by an annual average of 2% in volume.

In terms of value, European imports from developing countries grew by 13% per year in the same period, up to €20 million in 2017. These figures show that cardamom has experienced a huge price increase of 15% per year.

Europe imported 3,068 tonnes (€31 million) of cardamom in 2017. Almost all imports were either sourced from developing countries or re-exported within Europe (99%). The majority of imports (67%) were directly sourced in developing countries, while the remainder took place through re-exports. The largest European re-exporters are the Netherlands, the United Kingdom, Germany and Sweden.

Figure 1: European imports of cardamom directly from developing countries and from European countries 2013–2017

in tonnes



Source: Eurostat, 2018

Tip:

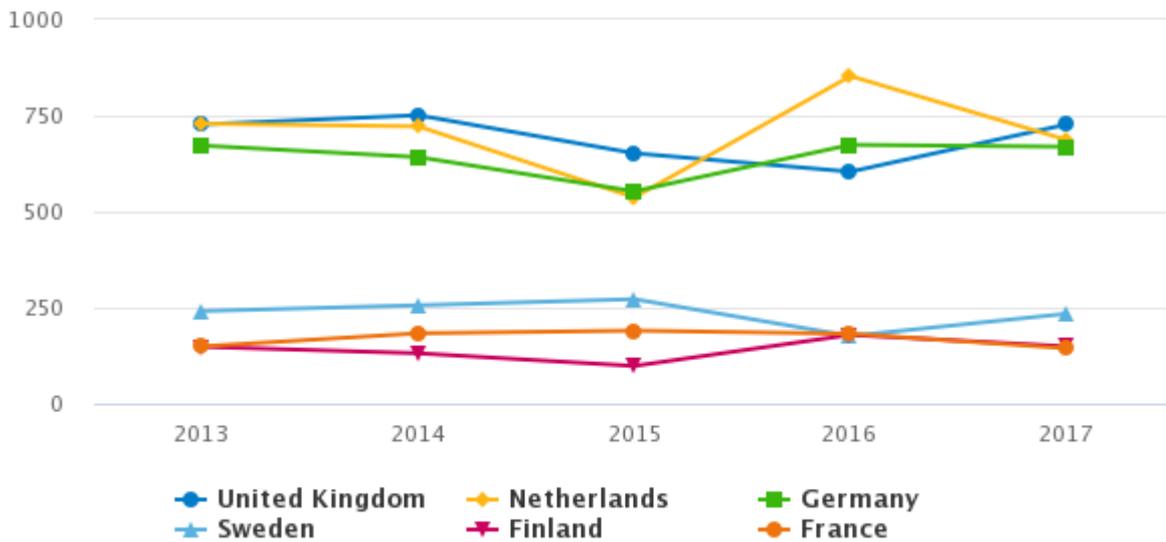
Invest in establishing long-term trade relationships with your buyers. Demonstrate that you can deliver stable supplies that meet food safety and product quality requirements.

The most interesting European markets are the United Kingdom, Germany, the Netherlands and Scandinavian countries

In Europe, the United Kingdom, Germany, the Netherlands and Scandinavian countries are notable importers as well as consumers of cardamom. These countries use cardamom in traditional recipes, such as the spicy cake called "Kuchen" in Germany or the Christmas bread "Julekake" in Scandinavia.

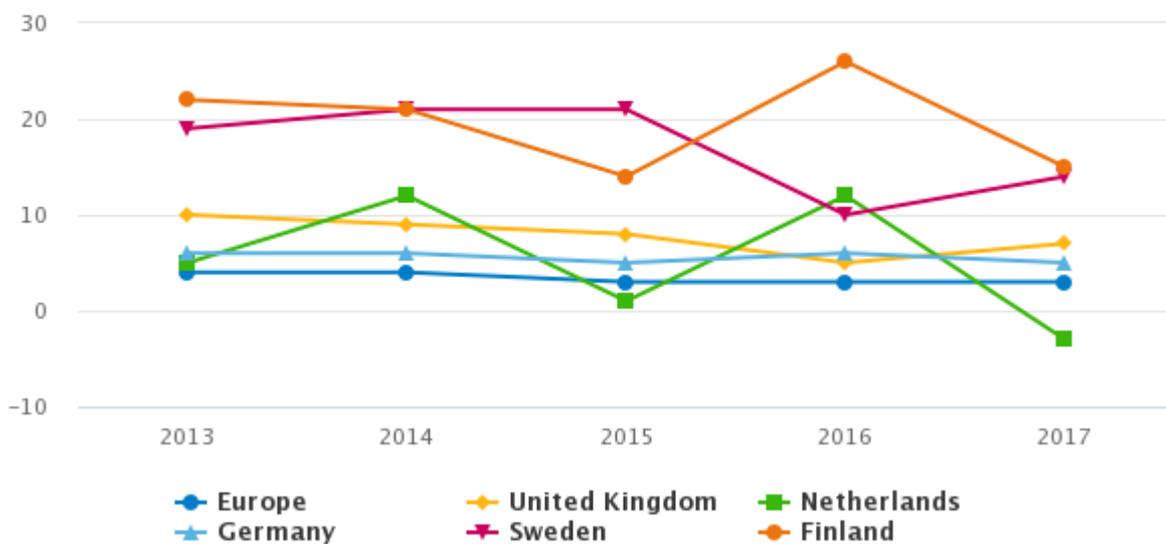
Figures 2 and 3 show the leading importers of cardamom in Europe and their consumption per capita. Consumption is calculated as imports minus exports and also includes the use of cardamom in the food processing industry. This observation is important, since 80% to 90% of the imported spices are used in this industry.

Figure 2: Leading European importers of cardamom 2013–2017
in tonnes



Source: Eurostat, 2018

Figure 3: Per capita cardamom consumption of leading importers 2013–2017
in grammes per capita



Source: Eurostat, 2018

Interesting markets for you include:

- The United Kingdom: imports remained stable. This country is the main European importer of cardamom. Moreover, the share of imports from developing countries (92% in 2017) is high. The United Kingdom has one of the highest per capita consumption of cardamom, mainly due to a large share of British people of Indian descent.
- The Netherlands: this is the second largest importer from developing countries, as 91% of its cardamom originated in developing countries in 2017. It also has an above-European per capita consumption of

cardamom, due to the traditional use of cardamom in several spiced baked products. The Netherlands is also the main re-exporter of cardamom with a market share of 46% of total European exports in 2017.

- Germany: this is an important importer of cardamom in Europe. In 2017, 56% of its cardamom imports originated in developing countries.
- Sweden: the per capita consumption of this country is significantly higher than the European average, as cardamom is used in [traditional Scandinavian baking recipes](#). Sweden is also a significant importer from developing countries, with a share of 5% in the European market.
- France: this is an important importer of cardamom. Its imports from developing countries have increased by 19% in volume since 2013. In 2017, 70% of its imported cardamom was sourced directly from developing countries.
- Finland: this is a smaller (market share of 5% in 2017) but still significant importer of cardamom. The country sourced 54% of its cardamom directly from developing countries.
- Spain, Switzerland and Austria: these relatively small importers showed an increase in importing cardamom directly from developing countries in the last five years: Spain (by 11% annually), Switzerland (8%) and Austria (50%).

Tips:

Conduct additional market research to gain an insight into the differences between the various European markets mentioned above. For example, create a free account for statistical databases such as [Eurostat](#) or [ITC Trade Map](#).

Visit or participate in trade fairs to test if the market is open to your product, get market information and find potential buyers. The most relevant trade fairs in Europe are [Food Ingredients Europe](#), [Biofach](#) (for organic products) and [SIAL](#).

See our tips on [finding buyers](#) and [doing business](#) for additional information.

Global production has decreased

Global production of cardamom is estimated at [55 thousand tonnes per year](#). Since 2015, the global production of cardamom has [decreased](#) due to unfavourable weather conditions in most producing regions. This situation influenced the [harvests in 2016, 2017 and in the beginning of 2018](#).

Weather conditions [were more favourable in 2017](#), since the global weather system has shifted from [El Niño to La Niña](#) in 2016. El Niño and La Niña are global weather phenomena that occur in a cycle of several years. This means that the weather conditions in producing countries are expected to improve in the next years, until the global weather system will shift again.

These shifting weather patterns influence the yield in the producing country and the global availability of cardamom. Due to the shift to La Niña and improving weather conditions, the worldwide supply of cardamom is expected to increase. This development will affect the prices of cardamom in the upcoming years.

Tips:

Keep track of the weather patterns in your region to make sure that you know what to expect in terms of supplies. Contact your suppliers for more information.

Read more about the effect of La Niña on agriculture; for example, in [this article by Business Mirror](#).

European processing companies play an important role in the European cardamom market

Cardamom is mainly imported and consumed in whole form. Figure 4 below depicts the main suppliers of whole cardamom to Europe.

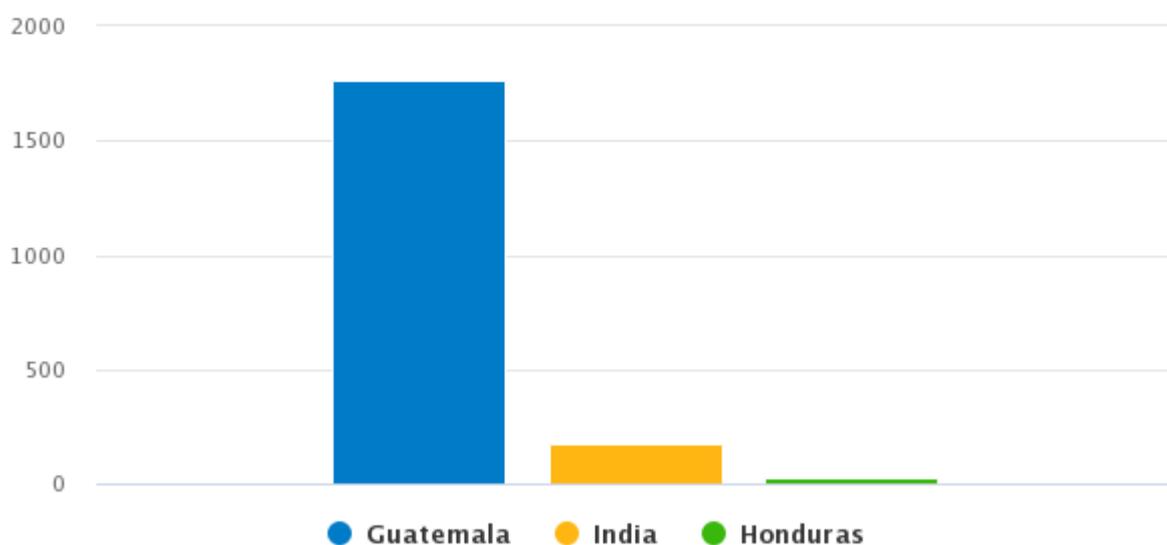
However, the food processing industry also buys significant amounts of crushed cardamom. European (re-)exporters add value to re-exported and processed cardamom by further processing and packaging. Stocking and distributing the product in smaller quantities is also a way of adding value. Processing and heat treatments, such as steam sterilisation, are mainly done by European processors. More and more, however, these processes are performed in countries of origin as well. Especially heat treatment is becoming an important buyer requirement.

The added value of processing is illustrated by the unit import price in 2017 (Eurostat, 2018). European re-exporters sold their cardamom at an average price of €11,000 per tonnes, while developing countries importers received an average of €10,000 per tonnes. Most value is added by consumer packaging and branding, but this activity is not reflected in these figures.

The share of exported crushed cardamom from developing countries is still small (10%). Figure 5 below shows that India is the main supplier of crushed cardamom to Europe, followed by Guatemala and Lebanon. Several suppliers have increased their imports of crushed cardamom significantly. One example is Lebanon, whose imports increased by 7% annually from 2013 to 2017.

Figure 4: Suppliers of whole cardamom from developing countries 2017

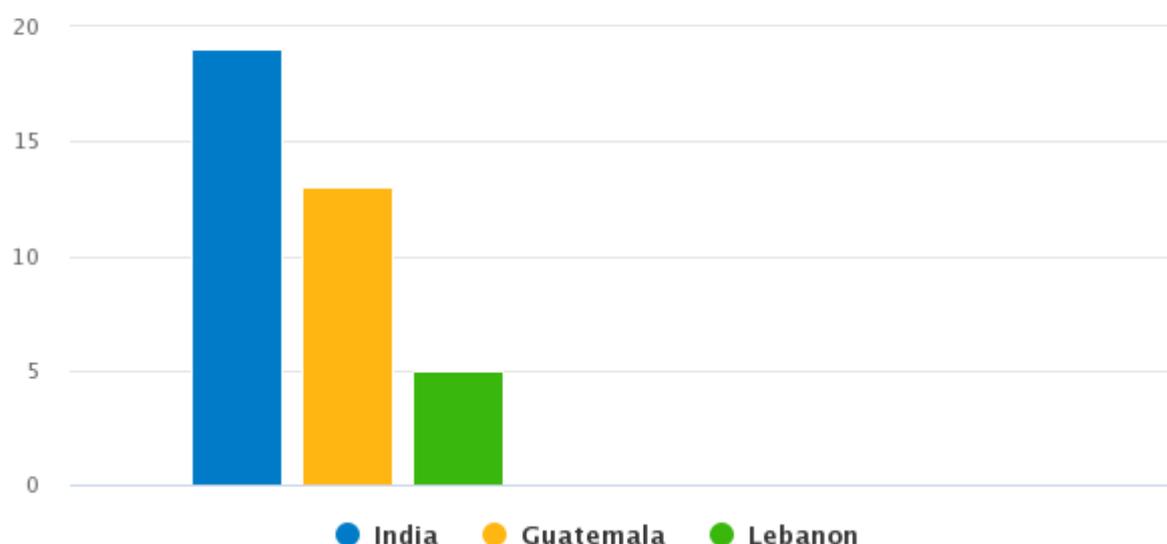
in tonnes



Source: Eurostat, 2018

Figure 5: Suppliers of crushed cardamom from developing countries 2017

in tonnes



Source: Eurostat, 2018

Tips:

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

See our study of [exporting value-added spices and herbs](#) for additional information.

See our study of [exporting oleoresins for food to Europe](#) for more information on value added cardamom products.

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

Growing popularity of Asian cuisines

The demand for Asian food in Europe is rising. Since many Asian recipes use cardamom as an ingredient, this is an interesting development for you as a cardamom exporter. The increasing demand for Asian food is due to two main causes:

- The multicultural population in Europe is growing. In 2014, [20%](#) of immigrants to Europe were of Asian descent.
- Europeans are increasingly interested in exotic cuisines. They are linked with the rest of the world through the internet and travelling. Europeans can easily search for Asian recipes online and bring back recipes from their holidays to Asia.

Examples of Asian recipes that are popular in Europe and contain cardamom are:

- Indian chai tea. This tea is made with a mixture of spices, cardamom being one of the key ingredients. Indian chai tea is [increasingly popular](#) in European countries.
- Indian curry. Curry is a popular dish in Europe. Large retailers sell curry paste and other curry ingredients, such as [Albert Heijn in the Netherlands](#) and [Morrisons in the United Kingdom](#). Cardamom pods are one of the main ingredients in curry paste.

Tips:

See our study of [trends on the European spices and herbs market](#).

Add a recipe to your packaging, if your packaging is directly sold to consumers. This information provides consumers with new ideas on how to use cardamom, especially if they want to learn more about exotic cuisines. See our study of [exporting value-added spices and herbs](#) for more information.

Sustainability is on the rise

Sustainable sourcing is key in the European market. This is especially the case in the United Kingdom, the Netherlands and Germany (the most important European buyers of cardamom). As a supplier, you will be increasingly faced with sustainability requirements from your buyer, since many buyers see sustainable sourcing as a must. For the European spices market, the main sustainability requirement is traceability; buyers and consumers want to know where their product is coming from.

By certifying your cardamom, you can prove your compliance with sustainable sourcing. However, certified cardamom is still a niche market, representing only a small section of the total European market. In addition, most buyers in the mainstream market are unwilling to pay more for certified products. It is therefore important to discuss the opportunities for certification with your buyers before you get certified.

Certification does give you a competitive edge.

The main certifications for spices are:

- Organic. The overall market for organic food products is growing rapidly, especially in Sweden (by 39% in 2014), Denmark (8.3%) and in Germany (10%). There are no specific data available for cardamom.
- Rainforest Alliance. The main European markets for products certified by the Rainforest Alliance are the United Kingdom, the Netherlands and Germany. There are no specific data available for cardamom. On the supply side, there are seven Indian cardamom companies certified by the Rainforest Alliance, producing a total of [51 tonnes in 2017](#). Since certification by Rainforest Alliance only started in 2013, this is a relatively large amount.
- Fairtrade. Sales of other spices such as vanilla are increasing. There are no specific data available for cardamom. The United Kingdom is the main market for Fairtrade certified spices.

Tips:

Determine if it is feasible for you to certify your cardamom. Can you find enough buyers for your product to offset your investments? You can look for buyers online, such as on the website of the [International Trade Centre](#). In addition, you can look for exhibitors at [BioFach](#), the most important European organic trade fair.

See our study of [exporting sustainable spices and herbs to Europe](#) for additional information. This document also includes long-term expectations of the market for certified sustainable products.

See our study of [European buyer requirements for spices and herbs](#) for additional information on certification standards.

Work together with European buyers, nongovernmental organisations or national and international governmental organisations to make it economically feasible for you to receive certification. Further information is available on websites such as the [Sustainable Spice Initiative](#), the [Netherlands Enterprise Agency](#), the [German Ministry for Economic Cooperation and Development](#) and [Cordaid](#).

3. What requirements should cardamom comply with to be allowed on the European market?

You can only export cardamom to Europe if you comply with the [buyer requirements for spices and herbs](#). Below, you will find more information related to requirements that are specific to cardamom.

Legal requirements

When exporting to Europe, you have to comply with the following legally binding requirements:

- Food safety. Traceability, hygiene and control measures are specified in the [General Food Law](#).
- [Maximum residue levels of pesticides](#). Pests can represent a serious threat to cardamom, especially *Sciothrips cardamomi*. You should take into account the maximum levels of pesticides set by the European Union. [Unregistered pesticides](#) are also occasionally used in the cultivation of cardamom, which must be avoided.
- [Microbiological contamination. your cardamom is banned from the market if salmonella is found](#)
- [Food additives and adulteration](#). Cardamom is often intentionally adulterated with cheaper varieties of cardamom or other similar-looking powders). As food adulteration is an important issue for European buyers, European governments are becoming stricter in the enforcement of food fraud legislation.
- [Maximum levels of polycyclic aromatic hydrocarbons \(PAHs\)](#). Contamination with PAHs is the result of bad drying practices.
- [Irradiation](#). This practice is allowed but not commonly used.

European buyers are increasingly requiring their suppliers to use steam sterilisation to combat microbiological contamination of cardamom. You could earn a significant premium if you can supply cardamom that is sterilised at the source. However, investments in the necessary equipment can have a high cost of up to €1 million.

Research is conducted into alternatives to steam sterilisation, as this treatment negatively affects the taste of cardamom. Currently, it is still the cheapest and safest method to combat microbiological contamination.

Tips:

Comply with the requirements listed above. Your buyer will transfer the cost of cleaning contaminated cardamom to you if you fail to comply.

Check the [Rapid Alert System for Food and Feed \(RASFF\) database](#) for examples of cardamom withdrawn from the European market and the reasons behind these withdrawals. Although withdrawals of cardamom do not occur often, keep in mind that these can occur and avoid them at all costs. A withdrawal will influence the reputation of your cardamom as well as the reputation of your country as a cardamom supplier.

Comply with food safety requirements during drying, storage, processing (such as sieving, mixing, grinding or crushing), packaging and transport. If you fail to comply, steam sterilisation will not work.

Additional requirements

Consider complying with the following non-legal requirements to get easier market access. European buyers may use these requirements as selection criteria:

- Food safety certification. The most important food safety management systems in Europe are the British Retail Consortium ([BRC](#)), International Featured Standards ([IFS](#)), Food Safety System Certification 22000 ([FSSC22000](#)) and Safety Quality Food ([SQF](#)). Always verify your buyer's preference for a specific food safety management system, as some may prefer the one system over the other. For example, BRC is developed by retailers in the United Kingdom and more commonly demanded in this market. If you want to target the United Kingdom, BRC may be more important.
- Corporate Social Responsibility (CSR). Companies have different requirements for CSR, which may include signing their code of conduct or following common standards such as Supplier Ethical Data Exchange ([SEDEX](#)), Ethical Trading Initiative ([ETI](#)) or Business Social Compliance Initiative ([BSCI](#)).

Requirements for niche markets

Complying with the following standards can be essential in accessing specific market segments and buyers in Europe:

- Self-verification. Suppliers can assess their own compliance with the sustainability code of buyers. Examples include Unilever's [Sustainable Agricultural Code](#) (SAC) or the [Olam Livelihood Charter](#).
- Sustainable product certification. The most popular certification systems are [Organic](#), [Fairtrade](#) and [Rainforest Alliance](#).

Quality requirements

As product quality is a key issue for buyers in Europe, you need to comply with the [Quality Minima Document](#) published by the [European Spice Association](#) (ESA). This document is leading for the national spice associations affiliated with the ESA and for most key players in Europe.

The document specifies the chemical and physical parameters that unprocessed cardamom needs to comply with when it is sold in Europe:

- Ash: maximum 9%
- AcidInsoluble Ash: maximum 2.5%
- Moisture: maximum 12%
- Volatile oil: minimum 4 ml/100 g

The ESA has not developed cleanliness specifications. As a result, European buyers often use the specifications for cleanliness set out by the [American Spice Trade Association](#) (ASTA).

Tips:

Check [ISO standard 882-1](#) for general guidelines on the grading, handling and packaging of cardamom.

Check ESA's [Quality Minima Document](#) for more information on the chemical and physical parameters that your unprocessed cardamom needs to comply with when it is sold in Europe.

Labelling requirements

Correct labelling is important for European buyers, which means that you should pay extra attention to labelling your product.

For bulk cardamom, you have to include the following information:

- the name of the product
- details of the manufacturer (name and address)
- batch number
- date of manufacture
- product grade
- producing country
- harvest date (month-year)
- net weight

Other information that exporting and importing countries may require includes the barcode, the producer and/or packager code, and any extra information that can be used to trace the product back to its origin.

You also have to mention the colour group on the label to indicate the grade of the cardamom, in case 95% of the cardamom corresponds to one colour (deep green, green, light green, pale brownish). If your cardamom does not have one uniform colour, you do not have to indicate the colour on the label. Buyers are often interested in buying one specific colour or grade.

Tip:

See our study of [value-added spices and herbs](#) for requirements on consumer packaging and labelling. In Europe, there are very strict requirements for packaging and labelling of consumer products, which differ from the requirements mentioned here.

Packaging requirements

Cardamom should be packaged in:

- Double-layered jute bags (42-50 kg)
- Single-ply fabric bags lined with polythene (42-50 kg)

Premium-grade cardamom is often packed in vacuum-sealed bags and shipped in 5-kg cartons.

Tips:

Always ask your buyer for their specific packaging requirements.

Store packaged cardamom in a dry, cool place to prevent quality deterioration.

If you offer Organic certified cardamom, physically separate it from cardamom that is not certified.

Make sure that the materials used for packaging are impermeable to moisture and air. Sealing machines can be used to seal the bags.

4. What competition do you face on the European cardamom market?

In 2017, suppliers from developing countries exported 2,054 tonnes of cardamom to Europe. Of these imports,

98% consisted of whole cardamom seeds.

Europe has shifted from India to Guatemala as its main supplier. However, data show that imports from Guatemala have decreased slightly at an annual average of 3% since 2013, whereas imports from India increased at an annual average of 6%. In 2017, Guatemala accounted for 58% of all European imports, while India accounted for only 6%.

The main reason for the shift from India to Guatemala as a main supplier is the difference in exporting prices, as Guatemalan prices are significantly lower compared to India. Guatemala produces mostly for export, while India has a very large domestic consumption which dictates its prices. There is also a difference in quality: Guatemala produces green cardamom, while Indian cardamom is yellow.

Smaller suppliers are:

- Honduras (market share of 0.7% in 2017)
- Vietnam (0.7% in 2017)
- Lebanon (0.4% in 2017)
- Sri Lanka (0.1% in 2017).

Available supplies depend heavily on production conditions in Guatemala. Guatemalan production has not always been stable due to problems with unfavourable weather conditions and pests. This situation opens up opportunities for exporters from other developing countries.

European buyers are willing to invest in long-term relationships or collaborations with their suppliers to ensure sufficient supplies. Buyers are also willing to pay higher prices to suppliers that can:

- Deliver stable supplies of cardamom in terms of both quantity and quality
- Comply with delivery times
- Comply with food safety requirements

Tips:

Keep an eye on the yield of cardamom in different regions in the world. This will help you to stay up to date on market developments and your biggest competitors. You can look for online crop reports; for example, from [Nedspice](#), or from public sources such as [Business Standard](#).

5. Through which channels can you get cardamom on the European market?

See our study of [channels and segments on the European spices and herbs market](#). The channels for cardamom do not differ significantly from those for other spices and herbs.

Tip:

See our study of [tips on finding buyers on the European spices and herbs market](#).

6. What are the end-market prices for cardamom?

In general, the price of cardamom fluctuates during the year:

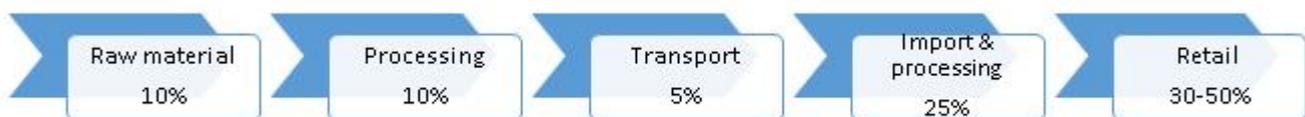
- Prices are generally high and stable from January to March, but start to rise from April onwards when fresh supplies dry up at the end of the harvesting season.
- Prices peak in June and start to fall from July onwards, as the first pickings of the new crop season arrive. Supplies peak in September and October, resulting in lower prices.
- Prices bounce back in November due to seasonal winter demand from North America and Europe.

Guatemala and India are the main producers of cardamom. In India, cardamom was priced at [€12 per kilogram in early 2018](#). Indian prices tend to be higher compared to Guatemala due to the strong domestic demand. By contrast, Guatemala has a very low domestic consumption and high production volumes. As a result, it is able to sell cardamom at a lower price than India.

In India, Guatemalan cardamom is mixed with lower quality cardamom used for domestic use. This process increased the supply of cardamom in India and [lowered the national prices significantly](#).

Statistical data have shown an increase in value of cardamom imported into Europe since 2013. This is part of expected fluctuations throughout the years, as European import prices of cardamom started to increase once again in 2016.

Figure 6: Indicative price breakdown for cardamom as sold in spices and herbs section of supermarkets, in %



Source: ProFound, 2018

Figure 6 above gives an indicative price breakdown for cardamom. European retail prices for cardamom are much higher than global trade prices, as European processing companies and retailers add large price margins.

Actual margins may differ, as these are influenced by various factors such as:

- Country of origin
- Current and expected future harvest situation
- Quality of the raw material
- Level of processing
- Level of demand
- Trends in prices

If you are able to add value locally (for example, by further processing or certification), your margins and profit can be higher.

Tips:

Monitor harvests in the main production countries ([Guatemala](#) and [India](#)) to anticipate price developments.

See the websites of [The Spices Board India](#), [Nedspice](#) and [ITC Trade Map](#) for up-to-date price information on cardamom.

Establish longstanding relationships with your buyers. Buyers are willing to pay higher prices to

suppliers that are able to help secure supply and comply with delivery times as well as food safety requirements. They will also be more willing to invest in your partnership.

See the report by Karvy Commodities for more [information about the cardamom crop calendar](#).

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