

## The European market potential for moringa?

Dried *Moringa oleifera* powder is mainly used in nutritional supplements in the European health products sector. Demand for such products is forecast to grow in the coming years. The main drivers are increasing life expectancy of European consumers, rising disposable incomes and growing consumer awareness. Health product companies are looking for natural ingredients that give active and functional properties to their products, whilst consumers are looking for natural alternatives to synthetic products.

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## 1. Product description

This study focuses on dried *Moringa oleifera* leaf powder and its use in health products. Moringa is mostly sold as a powder or in the form of capsules in the nutraceutical sector. The European food industry uses moringa in the powder, leaf, seed and oil formats because of its functional and nutritional properties. The European cosmetics industry mostly uses moringa oil for its moisturising, cleansing and emollient properties; it is also used in aromatherapy and massage oils, as it blends well with other essential oils, and it is also a good carrier oil.

India, South Africa, Ghana, Mozambique, Kenya and Zambia have an established commercial moringa production industry. It is estimated that India accounts for around 80 percent of the global moringa supply. Table 1 lists 13 moringa species and where they are native to. *Moringa oleifera* commercial production is the most developed. Most moringa products in Europe involve *Moringa oleifera*.

Table 1: 13 moringa species and where they are native to

<u>Species</u>	<u>Native To</u>
<i>Moringa arborea</i>	Kenya
<i>Moringa boziana</i>	Somali
<i>Moringa concanensis</i>	Northern India
<i>Moringa drouhardii</i>	Southwestern Madagascar
<i>Moringa hildebrandtii</i>	Southwestern Madagascar
<i>Moringa longituba</i>	Ethiopia and Somalia
<i>Moringa oleifera</i>	Northwestern India
<i>Moringa ovalifolia</i>	Namibia and Angola

<i>Moringa peregrina</i>	Arabian Peninsula, Horn of Africa and Southern Sinai, Egypt
<i>Moringa pygmaea</i>	Somalia
<i>Moringa rivae</i>	Kenya and Ethiopia
<i>Moringa ruspoliana</i>	Ethiopia
<i>Moringa stenopetala</i>	Kenya and Ethiopia

Source: Wikipedia

In the European health products market, *moringa oleifera* leaf powder is mainly used in food supplements and as a powder, because of its nutrients and beneficial health properties (see Table 2).

Table 2: Nutrients and beneficial health properties of *Moringa oleifera* leaf powders

Nutrients	Beneficial Health Properties
Vitamin A Vitamin C Calcium Potassium	Lowering blood sugar levels Protecting against diabetes Reducing inflammation and oxidation Defending against viral, fungal and bacterial infections Reduction of tiredness and fatigue
Iron Protein	Defending against cognitive decline Protecting kidney and liver function Strengthening skin and hair

Source: NCBI/Various

Moringa's high nutrient content is one of its main selling points. It is considered to be a superfood in the health products sector because its dense nutrient content can boost the immune system, balance hormone levels and improve skin and bone health, as well as vision. Moringa is also increasingly used as a plant-based protein source in vegan and vegetarian products.

Health products suppliers in Europe market moringa on its high vitamin and antioxidant content. Its versatile nature enables moringa powder to be added to a wide range of meals.

The drying process is an important step in moringa leaf powder production. Moringa leaves need to be dried immediately upon harvesting. This enables the leaves to retain their nutrient content. Transportation of loose dried leaves is not common; European importers source dried powder processed from the countries of origin.

Moringa powder does not have its own HS Code. It is traded under the HS Code 07129090 for other dried vegetables and mixtures of vegetables. It can be also traded under the HS Code 1219086 for other medical plants and parts of plants.

Figure 1: European food supplements containing *Moringa oleifera* leaf powder



Source: Various

### Tip:

Thoroughly research moringa's beneficial properties and how it compares to alternative products, as you can use this information to persuade European buyers to buy moringa. There are various websites dedicated to *Moringa oleifera*, such as [Moringa News](#).

## 2. What makes Europe an interesting market for moringa?

Europe is an attractive market for moringa suppliers in developing countries. There is high demand for high-quality nutritional supplements, providing an opportunity for moringa suppliers in developing countries. There is increasing demand for natural ingredients and a growing vegan and vegetarian population in Europe. Growing consumer awareness of the health properties of moringa is also generating demand for moringa. The coronavirus crisis is having a positive effect by stimulating demand for immune-boosting supplements and natural products. This trend is expected to continue in the future.

India is the leading producer of moringa drumsticks in the world with a production of 2.2 million tonnes of tender fruits annually, according to Agri Exchange. The production area is around 43,600 hectares; the main producing states include Andhra Pradesh, Tamil Nadu and Karnataka. In India, most moringa is produced on large plantations.

The cultivation of moringa varies between different parts of India. In the Northern and Eastern parts, leaves are harvested in December and January. In the Southern parts, the peak season for harvesting is between July/September and March/April. Moringa is also produced in Asia, Africa and Latin America in countries such as the Philippines and Bangladesh, Pakistan, South Africa, Ghana, Mozambique, Kenya, Zambia, Pakistan, Brazil and Peru.

In the European health products market, *Moringa oleifera* is mainly used in the health products sector. African moringa, *Moringa stenopetala*, is also present in the European market, but its share remains small.

There is a growing market for nutritional supplements in Europe. According to the [Fortune Business Insights](#), the

European dietary supplements market is projected to reach USD 20.9 billion by 2026. It is forecast that the market will grow at a compound annual growth rate of 4.9 percent between 2019 and 2026.

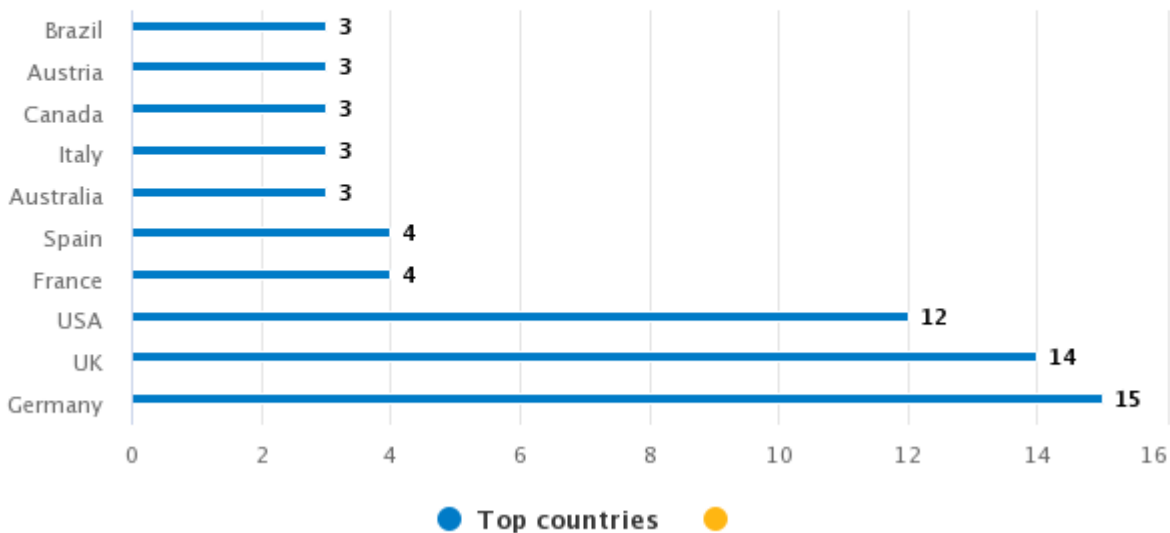
Despite relatively low consumer awareness of moringa, the market is growing. According to [Reportlinker](#), the European moringa products market was valued at USD 903 million in 2018. It is forecast that the market will grow at a compound annual growth rate of 8.7 percent to reach USD 1.9 billion by 2027. The main driver is growing awareness of moringa’s health properties, such as stress reduction, immunity boosting and anti-diabetic.

Moringa is also a source of plant-based protein, having all nine essential amino acids. The [European plant protein market](#) was worth USD 5.8 billion in 2018. The market is expected to reach USD 9.5 billion by 2027. European consumers are looking at ways to reduce meat intake. According to the [European Union agricultural outlook for 2018-2030 report](#), the per capita amount of meat eaten by Europeans is expected to fall from 69.3kg in 2018 to 68.6kg in 2030. The main reason behind this trend is the rise in vegetarianism and veganism in Europe.

Figure 2 shows the countries with the highest share of vegan product launches in the food and drink sector in 2018. It is shown that most of the countries are in Europe.

**Figure 2: Top countries with the highest share of vegan product launches**

in %

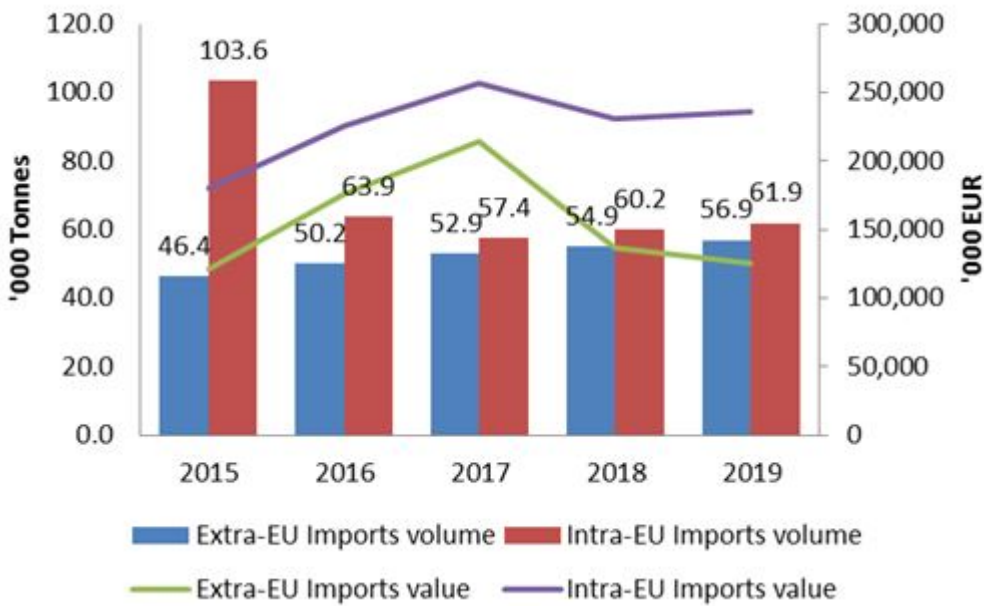


Source: Mintel

Moringa also helps boost personal immunity. In Europe, there is growing demand for health products that promote the immune system. According to [Wellmune consumer research](#), around 42 percent of global consumers look for products that can improve their health. About 20 percent said that immune support was their number one reason for purchasing healthy lifestyle products. The COVID-19 pandemic has further increased demand for immune-boosting health products.

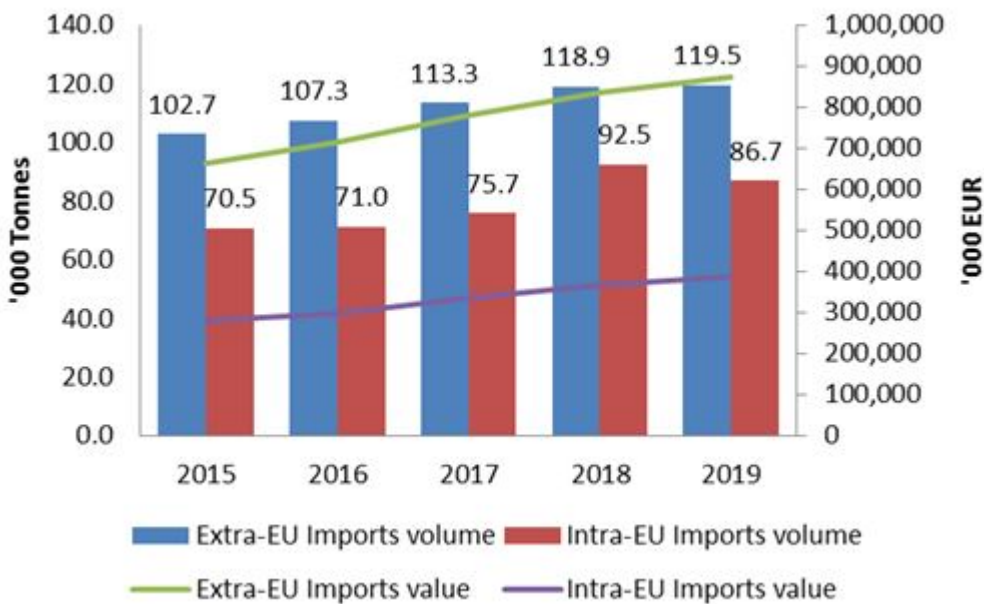
According to industry sources, this trend will become more important for European consumers. Rising health consciousness and increasing disposable income are also driving the demand for health products in Europe.

Figure 3: Imports of other dried vegetables and mixtures of vegetables with HS Code 07129090 to the European Union, 2015-2019



Source: Eurostat

Figure 4: Imports of other medical plants and parts of plants with HS Code 12119086 to the EU, 2015-2019



Source: Eurostat

According to industry sources, it is estimated that the volume of moringa leaf powder imported to Europe is around 130-160 tonnes. Figure 3 and 4 show imports of medicinal plants, under which category moringa is usually traded. It is shown that extra-EU imports increased in volume between 2015 and 2019. However, moringa is believed to account for only a small part of these imports. The demand for moringa ingredients has been increasing in the last few years, as more consumers have become aware of its benefits and the number of product launches of moringa products has risen.

The moringa market also faces growth restraints in Europe. The [European Food Safety Authority \(EFSA\)](#) raised safety concerns about moringa in September 2019. The safety concerns were about the African moringa (*Moringa stenopetala*) leaf, because of a lack of information on quality and quantity of undesirable substances.

So far, no conclusions have been reached. However, the concerns can discourage European consumers from purchasing moringa products.

Moringa is still not very well known among European consumers. It is expected that consumer awareness will rise in the near future as more operators enter the European market. This will stimulate demand for moringa-based health products.

The COVID-19 pandemic has also increased demand for natural immune-boosting products in Europe. However, supply shortages can cause disruption in the availability of moringa. As India accounts for the majority of the global production, its lockdown led moringa production to close in March and April 2020, thus disrupting supply chains. This could persuade European buyers to substitute moringa with alternative ingredients, especially those sourced more locally.

### Tips:

Visit trade shows that focus on the vegan and vegetarian lifestyle in Europe. Examples include [Veggie World](#) and [Veg Fest](#). You may find buyers there that are interested in plant-based protein ingredients.

Consider organic certification for your moringa. This can help you meet specific buyer requirements, as buyers are seeking high-quality products, and they view organic products as having higher quality and being safer. Exporters of organic moringa need to meet the [EU organic standard](#).

## 3. Which European countries offer most opportunities for moringa?

The most prospective countries for moringa are the Western European countries. These include Germany, the UK, France, the Netherlands, Italy and Spain. These countries have the biggest nutritional supplements markets, as well as relatively high awareness of moringa. Traders and suppliers of moringa products are also located in these countries.

### Germany

Table 3: Imports of ingredients with HS Code 07129090 and HS Code 12119086 to Germany, 2015-2019

2019	000 Tonnes	% Change Volume (2015-2019)	m EUR	% Change Value (2015-2019)	Exporters	Important Market Players
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HSC: 07129090	26.8	7%	79.9	0%	Poland (16%), Egypt (8.1%), Serbia (5.1%)	Africrops, AB Im- und Export A Beringer & Co, BioSim.
HSC: 12119086	71.5	12%	291.9	38%	The Netherlands (12.5%), Poland (12.4%), Egypt (8.8%)	

Source: Eurostat

Table 3 shows imports of other dried vegetables and mixtures of vegetables with HS Code 07129090 and other medical plants and parts of plants with HS Code 12119086. It is shown that the imports have been increasing in volume and value between 2015 and 2019. Several ingredients are listed under this HS Code. However, based on industry feedback, it is estimated that around 50-60 tonnes of moringa leaf powder is exported to Germany annually.

Germany has the largest consumer market in Europe. The German nutritional supplements market was worth EUR 2.1 billion in 2018, according to IQVIA. Around half of the market comprises vitamins and minerals, and about 10 percent is heart and cardiovascular supplements. Around 10 percent comprises immune-boosting supplements, and 10 percent is supplements for pain-relief, muscles and joints. Since moringa is a rich source of vitamins and minerals and it has several beneficial health properties (see Table 2), there are many opportunities for its use.

The vegan and vegetarian lifestyle is gaining popularity among German consumers. It is estimated that there are around 9.3 million vegans and vegetarians in Germany. According to Nielsen, around 31 percent of Germans are choosing to eat less meat. Some of the main importers of moringa are Africrops, AB Im- und Export A Beringer & Co. and BioSim.

Suppliers of moringa in developing countries should target German buyers of moringa, because Germany has the largest consumer market in Europe. Furthermore, the popularity of moringa is growing amongst German consumers. German consumers have a high level of health consciousness and awareness. The ageing population is also generating demand for moringa products. There is also a growing demand for organic moringa on the German market. The German organic food market is the largest in Europe. According to traders, Germany is one of the largest importers of organic moringa.

## United Kingdom

Table 4: Imports of ingredients with HS Code 07129090 and HS Code 12119086 to the UK, 2015-2019

2019	000 Tonnes	% Change Volume (2015-2019)	m EUR	% Change Value (2015-2019)	Exporters	Important Market Players
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HSC: 07129090	8.6	8%	25.3	9%	China (56.4%), Germany (9.1%), Belgium (8.4%)	Top Line Foods Organic Herb Trading Co Nutra Ingredients Minvita (Orient Solutions Ltd), Aduna
HSC: 12119086	17.5	107%	62.7	37%	The Netherlands (28.4%), Germany (15.2%), India (6.2%)	

Source: Eurostat

Between 2015 and 2019, UK imports of other dried vegetables and mixtures of vegetables with HS Code 07129090 and other medical plants and parts of plants with HS Code 12119086 have increased. Several ingredients are listed under this HS Code. However, based on industry feedback, it is estimated that around 20-30 tonnes of moringa leaf powder is imported to the UK annually. Leading traders of moringa in the UK include Top Line Foods, Organic Herb Trading Co, Nutra Ingredients, Minvita (Orient Solutions Ltd) and Aduna.

There is a growing preference for vegan and vegetarian products in the UK. [A survey conducted by Just Eat](#) found that the demand for vegetarian options increased by 987 percent in 2017. According to [Mintel](#), the UK had the highest number of new vegan food product launches in the world in 2018. Around 34 percent of meat eaters in the UK reduced their consumption of meat in the first half of 2018. These trends are leading to increasing demand for plant-based protein in the UK.

Suppliers of moringa in developing countries should target UK importers. Brexit (Britain's exit from the European Union) may disrupt demand for moringa. There is growing uncertainty about a future trade deal with the EU, and a no-deal situation would result in supply chains being disrupted. Regularly visit and check the BBC News website to keep up to date with the [latest Brexit developments](#).

## France

Table 5: Imports of ingredients with HS Code 07129090 and HS Code 12119086 to France, 2015-2019

2019	000 Tonnes	% Change Volume (2015-2019)	m EUR	% Change Value (2015-2019)	Exporters	Important Market Players
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HSC: 07129090	9.7	18%	34.0	16%	China (37.8%), Germany (23.4%), Belgium (9.3%)	Moringa & Co LT Labo Nature & Partage
HSC: 12119086	19.1	12%	87.8	24%	Morocco (15.8%), India (11.6%), Germany (11.3%)	

Source: Eurostat

Table 5 shows that imports of other dried vegetables and mixtures of vegetables with HS Code 07129090 and other medical plants and parts of plants with HS Code 12119086 have been increasing. Several ingredients are listed under this HS Code. However, it is estimated that around 15-20 tonnes of moringa leaf powder are imported to France annually.

France has an important consumer market for nutritional supplements. According to [Synadiet](#), sales of food supplements reached EUR 1.92 billion in France in 2018. This was an increase of 1.3 percent compared to the previous year. Important market players include Moringa & Co, LT Labo and Nature & Partage.

According to industry sources, French consumers are becoming more aware of moringa products. Suppliers of moringa in developing countries should take advantage of this opportunity and target French buyers. It is expected that demand for moringa will increase further in the coming years.

## The Netherlands

Table 6: Imports of ingredients with HS Code 07129090 and HS Code 12119086 to the Netherlands, 2015-2019

2019	000 Tonnes	% Change Volume (2015-2019)	m EUR	% Change Value (2015-2019)	Exporters	Important Market Players
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HSC: 07129090	20.2	-69%	80.2	57%	China (23%), Germany (22.9%), Spain (16.2%)	Z Company Sigma Oil Seeds Moringa's Finest Yamba Health Kraatje
HSC: 12119086	11.9	48%	50.2	39%	Kenya (15.9%), Egypt (9%), USA (8.4%)	

Source: Eurostat

The Netherlands offers an opportunity for moringa suppliers in developing countries, as it is a significant importer of raw materials. Most moringa imported into the Netherlands gets re-exported to other European countries. Imports of moringa into the Netherlands are low compared to countries such as Germany and the UK. Important market players include Z Company, Sigma Oil Seeds, Moringa's Finest, Yamba Health and Kraatje.

Table 6 shows imports of other dried vegetables and mixtures of vegetables with HS Code 07129090 and of other medical plants and parts of plants with HS Code 12119086. Imports of dried vegetables under the HS Code 07129090 decreased in volume and increased in value in the last five years. This could indicate an increase in price, but this HS Code is not entirely representative of moringa powder. Imports of ingredients under the HS Code 12119086 increased both in value and in volume between 2015 and 2019.

It is expected that demand for moringa from the Netherlands will continue to rise, as the popularity of moringa increases in European countries.

## Italy

Table 7: Imports of ingredients with HS Code 07129090 and HS Code 12119086 to Italy, 2015-2019

2019	000 Tonnes	% Change Volume (2015-2019)	m EUR	% Change Value (2015-2019)	Exporters	Important Market Players
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HSC: 07129090	2.7	-26%	8.7	-15%	China (35.7%), Germany (16.2%), Hungary (9.3%)	Bioaltech Fastbrain Favella Group
HSC: 12119086	11.1	-10%	66.5	6%	India (14.2%), Austria (13.8%), USA (7.33%)	

Source: Eurostat

Italy has one of the largest consumer markets in Europe. It also has one of the biggest markets for organic products. The organic food market has been growing annually. Italian consumers have high consumer awareness and demand high-quality natural health products. Important Italian market players in Italy include Bioaltech, Fastbrain and Favella Group.

Imports of ingredients with HS Codes 07129090 and 12119086 decreased in volume between 2015 and 2019. However, these import data do not represent just moringa imports. Italian traders tend to source moringa from intra-EU trade from countries such as Germany and the Netherlands. The Red Moringa company sources moringa that is cultivated in Spain.

The Italian market for moringa products is still in a nascent stage of development. It is expected that demand for moringa will increase in the future, as consumer awareness rises. Growing consumer awareness of health and wellness products is likely to be the major driver.

## Spain

Table 8: Imports of ingredients with HS Code 07129090 and HS Code 12119086 to Spain, 2015-2019

2019	000 Tonnes	% Change Volume (2015-2019)	m EUR	% Change Value (2015-2019)	Exporters	Important Market Players
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HSC: 07129090	6.7	18%	13.7	20%	China (48.5%), Germany (12.4%), Italy (11.8%)	The Food Team, Honest Food, Robis
HSC: 12119086	24.8	6%	85.1	29%	Egypt (7.7%), USA (7.4%), Poland (6.6%)	

Source: Eurostat

According to the Association of Dietetic and Food Supplement Companies (AFEPADI), the Spanish nutritional supplements market was valued at EUR 920 million in 2018. Spain is also an important market for organic products. Important market players include The Food Team, Honest Food and Robis.

Table 8 shows increasing imports of ingredients with HS codes 07129090 and 12119086 between 2015 and 2019. However, imports of moringa to Spain remain small when compared to Germany and the UK. There is also domestic production of moringa. However, this does not represent a threat to suppliers of moringa in developing countries. The Spanish production is not sufficient to meet demand in Europe.

Spain has a prospective market for moringa suppliers in developing countries. The demand for high quality and organic products is increasing. Although the awareness of moringa is still relatively low in Spain, it is expected that demand will increase in the future as more market players enter the market. Suppliers of moringa should target Spanish buyers, especially those that focus on organic and natural products.

In conclusion, the most prospective countries for moringa are Western European countries. European consumers, especially those in Germany, the UK and France, are becoming more aware of the health properties of moringa. Most moringa products are sold in specialist retailers in Western European countries. Demand for moringa is expected to continue to increase in the coming years. The main restraint to market growth is low consumer awareness in overall Europe.

### Tips:

Focus on Western European countries, as they import the highest volumes of moringa; these countries also have consumers with the highest awareness of moringa products. Western European countries also have the largest nutritional supplements markets, as well as robust processing sectors.

Consider supplying organic moringa when targeting country markets such as Germany, Italy, the UK and France. These countries have the largest markets for organic products in Europe. Organic moringa is in growing demand in the European market.

Read the CBI study on [exporting plant proteins for health products to Europe](#). This has more information on competition, regulations and competition.

## 4. Which trends offer opportunities on the European moringa market

The popularity of moringa is increasing in the European market. However, its benefits are known to a relatively small part of the population. Demand for moringa is driven by rising health consciousness among the European population. European consumers are looking for natural ways to improve their health and immune system. The COVID-19 pandemic is accelerating demand for immune-boosting health products, including moringa.

### Calorie reduction and weight loss culture

A recent report found that the culture of weight loss and reducing calories is driving the moringa products market. Concerns relating to weight and obesity are increasing rapidly in most of Europe, and this trend is expected to continue; the European weight loss supplements market is [forecast to increase in the period up to 2025](#). This trend presents an opportunity for moringa suppliers to the European health products market.

This growth is because of [moringa's ability to reduce weight gain](#). Moringa has active properties, such as being a rich source of vitamins and fibre, being a remedy for water retention and stimulating metabolism. In addition, moringa is perceived as a natural food that is used for weight loss. Moringa suppliers should ensure that the nutritional profile of their products is of the highest level.

Moringa suppliers in developing countries should ensure their products are of high quality in terms of their properties. They can do this by avoiding contamination of moringa during its production and by storing it in suitable packaging materials and conditions. Following this, they can develop documentation such as detailed Technical Data Sheets and a Certificate of Analysis proving the moringa's nutritional profile is of the highest level and quality.

#### Tips:

Familiarise yourself with EU health claims regulations. See the list of [permitted health claims](#) under EU law. Do not make medicinal claims when approaching buyers in the European supplements industry.

Under EU Law, the use and claim of the word superfood must be supported by scientific evidence. Thus, be prepared to substantiate the use and claim of superfood with scientific data. Visit websites such as [sciencedirect.com](#) and [NCBI](#) to look for scientific papers.

See the CBI Study [What requirements must natural ingredients for health products](#) comply with to be allowed on the European market? Doing so will provide you with useful information and guidance on entering the European market. For example, terms such as 'low-fat' and 'fat-free' are regulated by the EU.

### COVID-19 offers new opportunities

The coronavirus pandemic is changing [consumer attitudes and behaviour](#) and is likely to continue to do so over the coming years as consumers seek products that help disease prevention. Since the virus outbreak, consumers have started to pay greater attention to their diets and health as they try to increase their personal immunity. Consumers are turning to vitamins and supplements, [and this trend is expected to continue](#).

Moringa powder contains [beneficial active nutrients](#), including vitamins and antioxidants that help to strengthen immunity. Moringa suppliers can capitalise on this by ensuring their products contain the highest levels of active nutrients. They should be ready to provide samples to prospective European buyers. In addition, they should highlight the beneficial active properties of their moringa in marketing materials.

## Tips:

Always send European buyers moringa samples of the highest quality, as this will improve your chances of doing business with them. Following this, always continue to send a high-quality, consistent product, because European buyers expect this.

When approaching European buyers, focus on the nutritional profile of moringa. Immune-boosting properties are a good selling point when approaching European buyers, as consumers are looking for natural ingredients/products to improve their health. Always substantiate your claims with scientific studies and evidence. See the CBI Study on Market Entry Requirements for exporting moringa to Europe.

Ensure that you have an online presence and that your website is up to date. This is because prospective European buyers use the Internet to find and assess prospective suppliers of moringa before doing business with them. Make sure you post updates on the state of your business, especially during such impactful events as a lockdown or a pandemic. For example, the Indian company [Terry Exports](#) has a modern website with helpful information on moringa and regular updates.

## Safety concerns may slowdown growth

A recent technical report by the European Food Safety Authority (EFSA) expressed safety concerns about [Moringa stenopetalam](#). The EFSA's safety concerns are about antifertility and negative liver enzyme effects that were found in animal studies and the potential to negatively affect thyroid function if consumed regularly. European consumers and buyers may now be cautious of buying moringa. This may dampen demand for moringa in Europe.

Firstly, you can mitigate this threat by reassuring buyers that the study was inconclusive. Secondly, highlight moringa's nutritional profile and, thirdly, its beneficial health properties; see Table 2: nutrients and beneficial health properties of *Moringa oleifera* leaf powders.

With increasing demand for high-quality products and ingredients from European consumers, it is expected that safety requirements, such as food safety requirement that guarantee safety and quality, will continue to become stricter. This could put additional pressure on moringa suppliers in developing countries, potentially preventing them from accessing the European market.

## Tips:


Familiarise yourself with moringa's beneficial properties, as this is a key way to reassure European buyers of moringa. It also gives you an advantage when approaching and persuading prospective buyers, as moringa's beneficial properties are a major reason why it is in high demand.

Highlight moringa's beneficial properties on your company website and marketing materials, such as your product portfolio and catalogues, as moringa's beneficial properties are one of its key selling points on the European market.


This study has been carried out on behalf of CBI by [Ecovia Intelligence](#).

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