

The Swiss market potential for cocoa

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Switzerland has a strong reputation as a producer of high-quality chocolates. Several Swiss chocolate brands are well known internationally, including Lindt and Toblerone. As such, Switzerland is among the largest chocolate exporters in the world. The domestic market is also strong: Swiss consumers record the world's second-highest per capita chocolate consumption.

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1. Product description

The focus of this document is cocoa beans (whole or broken, raw or roasted). These fall under HS code 1801. Harmonised System (HS) codes are used to classify products and to calculate international trade statistics, such as imports and exports.

The cocoa tree (*Theobroma cacao*) grows in tropical areas, between 15 and 20 degrees latitude north and south of the equator, in Africa, Asia and Latin America. Cocoa pods grow directly from the trunk and thicker branches of the tree. After extraction from the pod, cocoa seeds (beans) are fermented and (sun) dried. A cocoa producing tree can deliver on average 7-9 kg of dry beans per year.

The three main varieties of the cocoa tree as distinguished by the international cocoa market are:

1. *Forastero* is the predominant cocoa variety. It is mainly cultivated in Africa, but also in Central and South America. It accounts for around 80% of global cocoa production. *Forastero* grows faster and has a higher yield than other cocoa varieties. The beans have a strong, earthy flavour. Generally, bulk cocoa beans come from *Forastero* trees. Well-known *Forastero* subspecies are *Amelonado* and *Nacional*. *Nacional* trees in Ecuador produce fine flavour cocoa.
2. *Criollo* (original cocoa tree) is mainly grown in Central America, northern South America, the Caribbean and Sri Lanka. *Criollo* makes up around 5% of global cocoa production. The beans have a delicate and sweet flavour. *Criollo* is often mixed with other varieties when making chocolate, given that it is scarce and expensive. Fine flavour cocoa beans are produced from *Criollo* cocoa trees. Well-known varieties are *Chuao*, *Porcelana* and *Ocumare*.
3. *Trinitario* is mainly cultivated in Central and South America, the Caribbean and Asia. The beans are a hybrid of the *Criollo* and *Forastero* trees. This variety represents around 10-15% of global cocoa production. The beans have a floral, fruity flavour. The cocoa beans from *Trinitario* trees are classified as fine flavour cocoa. There are exceptions, however, as Cameroonian cocoa beans produced from *Trinitario* trees are classified as bulk cocoa beans. Well-known varieties are *Carenero*, *Rio Caribe* and *Sur del Lago*.

Cocoa-bean derivatives (cocoa paste, cocoa butter and cocoa powder) are covered in [our study on semi-finished cocoa products in Europe](#).

2. What makes Switzerland an interesting market for cocoa?

Switzerland has a strong reputation as a producer of high-quality chocolates. The country is among the largest chocolate exporters in the world. The Swiss domestic chocolate market is also strong: Swiss consumers mark the second-highest per capita consumption worldwide.

Switzerland has world's second-highest per capita chocolate consumption

Switzerland has the second-highest consumption per capita in the world, after only Germany. In 2021, this amounted to 11.3 kilograms – 2.2 kilograms more than German consumption. Average annual chocolate consumption in the country had been decreasing slightly in recent years; [in 2020, it fell below the 10 kg per person mark for the first time since 1982](#).

This fall is mainly explained by the pandemic, due to the [collapse in tourism, the closure of shops, a drop in catering services and the decrease in gift sales of chocolates](#). Domestic chocolate sales and market revenues were well below the pre-pandemic levels of 2019. There is also evidence of an [increase in consumption of imported](#) products at the expense of domestically made Swiss chocolate. But growth in consumption resumed in 2021, when [domestic chocolate sales rose by 7.7%](#) compared with the previous year.

Switzerland is a relatively large importer of cocoa beans

Switzerland is the ninth-largest European importer of cocoa beans, importing about 52,000 tonnes in 2021, at a value of €145 million. As a comparison, the Netherlands is the largest importer with an estimated 804,000 tonnes that same year, followed by Germany (445,000 tonnes) and Belgium (335,000 tonnes).

Over 99% of imports by Switzerland are sourced directly from producing countries. The largest cocoa suppliers are Ghana (50%), Ecuador (24%) and the Dominican Republic (7.8%). Swiss import volumes of cocoa beans increased at an annual average rate of 5.2% between 2017 and 2021.

Switzerland houses a strong chocolate-manufacturing industry

Almost all cocoa beans imported into Switzerland are used domestically for further processing. In 2020/21, the Swiss grinding industry processed an estimated [50,000 tonnes](#) of cocoa (about 2.9% of total European grindings and 1% of total global grindings). Examples of large companies that engage in cocoa grinding in Switzerland are [Barry Callebaut](#), [Lindt & Sprüngli](#), [Nestlé](#), [Stella Bernrain](#) and [PRONATEC](#).

Processed cocoa beans are used for the manufacture of chocolate. [Only ready-conched chocolate or chocolate mass entirely manufactured in Switzerland may be called 'Swiss chocolate'](#).

Switzerland is home to 16 chocolate manufacturers and many small and medium-sized chocolate makers. The largest manufacturers are [Barry Callebaut](#) and [Lindt & Sprüngli](#). These multinationals were both founded in Switzerland. [Chocolat Frey](#), part of the [Migros Group](#), is also a major producer of chocolate for Migros' own popular private label brand [Chocolat Frey](#).

Swiss chocolate exports keep on increasing

According to International Trade Centre data, Switzerland accounted for 1.8% of global exports of chocolate and other food preparations containing cocoa in 2021. Chocolate export volumes reached over 118,000 tonnes in 2021, with a value of €722 million. Exports increased slightly between 2017 and 2021, at an average annual rate of 0.9%. The main export markets for Swiss chocolate in 2021 were Germany (20%), France (11%), Canada (9.1%) and the United Kingdom (8.3%).

Swiss chocolate remains popular, and new Swiss chocolate export deals continue to be made. For instance, [Lindt & Sprüngli has 11 production sites in Europe and the USA](#). Even Chocolat Frey (the brand of the Swiss retailer [Migros](#)) is now [sold in several countries around the world](#).

Tips:

Activate the “Translation” function of your browser to make the studies available in your native language.

Check the website of the [Swiss Chocolate Industry Association \(CHOCOSUISSE\)](#) to learn more about the chocolate industry in Switzerland.

Access the [ITC Trade Map](#) to analyse European and Swiss trade dynamics yourself and to build your export strategy. By selecting Switzerland as your target market, you will be able to follow developments such as the emergence of new suppliers and the decline of established ones.

See our study of [trade statistics for cocoa](#) for more detailed information about the European trade in cocoa beans.

3. Which trends offer opportunities on the Swiss market?

In 2018, the Swiss Platform for Sustainable Cocoa was founded. Its members, including the large industry players, have [committed to sourcing at least 80% of their cocoa from sustainable production by 2025](#). Sustainability is also a key theme for consumers: the Swiss market for organic and fair-trade cocoa is relatively large compared to other countries.

Swiss consumers demand high-quality, premium products

[Swiss chocolate consumers increasingly prefer high-quality dark chocolate](#). This is especially the case in the French-speaking part of Switzerland, where [66% of chocolate consumers prefer dark chocolate](#). In German-speaking Switzerland, milk chocolate is still the preferred product by 70% of consumers.

The premiumisation of chocolate products is visible across different segments. For instance, on the lower end, retailer Coop offers [organic and Fairtrade-certified single origin chocolate](#) under its own private label brand. The private label line of retailer Migros also includes [a diverse offer of premium products](#), for affordable prices.

Lindt & Sprüngli also continues to innovate their offer of premium chocolates in Switzerland. In 2018, the brand launched products focusing on a high cocoa content ([Dark Competence](#)) and on new snacking formats ([Fruit Sensation](#)).

In the high-end market, there is a growing number of bean-to-bar chocolate makers in Switzerland. Examples of Swiss bean-to-bar makers are [Choba](#), [La Flor](#), [Orfeve](#) and [Sadé Chocolat](#). These chocolate makers source their cocoa beans directly from origin.

There is also a large range of premium chocolate shops in Switzerland, including well-known ones such as [Teuscher](#), [Max Chocolatier](#), [Läderach](#), and [Sweetzerland](#).

Organic and fair-trade cocoa are very important on the Swiss market

Switzerland is an interesting market for fair-trade and organic cocoa, as there is a strong ethical push from Swiss consumers to buy these products. Swiss per capita consumption of organic products (including chocolate) [was estimated at €418 in 2020](#), which made it the highest worldwide. Swiss organic retail sales amounted to €3.6 billion in 2020. Switzerland has the third-highest organic market share in the world, at [11% in 2020](#). According to the Research Institute of Organic Agriculture, Swiss organic retail sales increased by an average of 12% between 2016 and 2020.

The Swiss also registered the world's highest per capita consumption of fair-trade products, with [an estimated €103 per person spent in 2020](#). [Chocolate, together with fruits, are the product groups with the highest Swiss fair-trade turnovers](#).

Sales of fair-trade cocoa in Switzerland have risen over the years, registering a growth rate of 3.8% between 2020 and 2021. In 2021, Switzerland sold [6,800 tonnes](#) of fair trade-certified cocoa products, which is 14% of the country's total cocoa and chocolate products.

Examples of Swiss chocolate companies producing fair-trade and organic chocolates are [Durig Chocolatier Lausanne](#), [Stella Bernrain](#) (which mainly produces under private label) and [Pronatec](#). The latter is now emerging as a [100% organic production plant where 15,000 tonnes of organic cocoa beans will be processed a year](#), in response to organic and traceability trends.

Retailers are also increasingly demanding organic and/or fair-trade certified products. [Coop](#) is currently the largest Swiss retailer selling Fairtrade and organic-certified products. As part of Coop's sustainability policy, all chocolate products sold in their shop are Fairtrade-certified.

For a successful example of an exporter dealing with both organic and Fairtrade cocoa, check out [CONACADO](#), a union of cocoa co-operatives in the Dominican Republic. CONOCADO has successfully developed markets around the world, including Switzerland. More than 90% of the farms supplying the union are organic certified, and a large proportion also fair trade-certified. Apart from its organic, fair trade and other certifications that follow market demand, CONACADO's competitive edge lies on its business model: a union of small and medium-sized cocoa producers.

Sustainability is key in the Swiss cocoa and chocolate sector

Sustainability factors are becoming increasingly important for Swiss consumers when shopping. Results from one survey indicate that [the majority of Swiss consumers consider sustainability information as important or very important when it comes to purchasing products online](#).

The [Swiss Platform for Sustainable Cocoa](#) was founded early 2018, with the aim of promoting sustainability in the cocoa value chain. Over 60 actors from the cocoa and chocolate sector actively participate in this initiative. One of the main goals is to [ensure that 80% of Swiss cocoa imports are produced sustainably by 2025](#). The large multinational [Barry Callebaut](#) was one of the founding members.

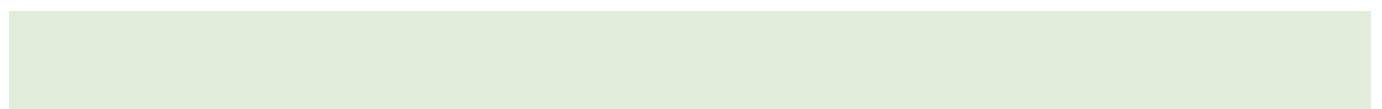
Besides this sector-wide initiative, most chocolate companies based in Switzerland have their own sustainability strategies. Examples include Barry Callebaut's [Forever Chocolate](#) programme, Nestlé's [Cocoa Plan](#), Lindt & Sprüngli's [sustainable sourcing programme](#) and Felchlin's [Fair Direct Cacao](#) strategy.

Major companies also fully endorse certification schemes. For instance, all cocoa sourced by [Maestrani](#) is certified by either [Fairtrade](#), [Rainforest Alliance/UTZ](#) or [Hand in Hand](#).

Swiss consumers are increasingly choosing healthier chocolate products

There is an increasing interest in dark chocolate consumption in Switzerland. This trend is in part driven by [consumer preferences for healthier products, which have been strengthened since the COVID-19 pandemic](#).

Chocolate makers are responding to this health trend by increasingly offering sugar-free, sugar-reduced and vegan chocolate products. For instance, the Swiss chocolate maker [Löw Delights](#) produces premium vegan chocolates. Lindt & Sprüngli released [non-dairy chocolate bars \(made with oat milk\)](#), which won the [Most Innovative New Product Award \(Chocolate\)](#) at the 2022 [Sweets & Snacks Expo](#).



Tips:

See [our study on trends for cocoa](#) to learn more about current trends and developments on the European market for cocoa and cocoa products.

See [our study on doing business with European buyers of cocoa](#) for more tips on marketing and promotional aspects of your cocoa.

Consider demonstrating the sustainable and ethical aspects of your cocoa production through certification. Before engaging in a certification programme, make sure to check (in consultation with your potential buyer) that this label has sufficient demand in your target market and whether it will be cost-beneficial for your product.

Besides your certification, also promote other sustainable and ethical aspects of your production process. Note that, in addition to certification, the transparency of the supply chain has become increasingly important in the cocoa sector. This means you should be able to prove and communicate a traceable chain for your products.

Find potential business partners in Switzerland by checking the lists of [Fairtrade-certified organisations](#), [Swiss Rainforest Alliance-certified brands](#), [UTZ-certified cocoa supply chain actors](#) and [organic chocolate producers](#).

Focus on the premium, speciality and fine-flavour cocoa market in Switzerland. You can only access the premium market if you offer high-quality cocoa. Try to establish direct trade relationships with smaller traders and chocolate makers. See the section on quality requirements, market segments and trade channels in the [Entering the Swiss market for cocoa study](#).

This study was carried out on behalf of CBI by Gustavo Ferro and Lisanne Groothuis of [ProFound – Advisers In Development](#).

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