

# The European market potential for coriander seeds

Last updated:  
27 November 2024

Europe is a stable and growing market for coriander seeds. The United Kingdom is the largest importer, mainly buying from developing countries. Poland, Germany, the Netherlands, France, and Romania are other important markets. The *Macrocarpum* variety is used as a spice, while the *Microcarpum* variety, which has a higher oil content, is used to produce essential oils.

## Contents of this page

- 1. [Product description](#)
- 2. [What makes Europe an interesting market for coriander seeds?](#)
- 3. [Which European countries offer the most opportunities for coriander seeds?](#)
- 4. [Which trends offer opportunities or pose threats in the European coriander seeds market?](#)

## 1. Product description

Coriander seeds (scientific name: *Coriandrum sativum*) are the dried seeds of the coriander plant, which is part of the parsley family. The plant takes about 3.5 to 4 months to mature. The seeds are harvested when they change colour from green to yellowish-brown, showing they are ripe. After harvesting, the seeds are threshed, dried, and stored. Coriander seeds are available whole, crushed, or ground.

There are many varieties of coriander seeds used around the world, but two main types are most common: *Macrocarpum* (also called *Vulgare*) and *Microcarpum*. In table 1 the differences are explained in more detail.

Table 1: Main varieties of coriander seeds

Variety	Product specifications	Examples of producing countries
Macrocarpum / Vulgare	<ul style="list-style-type: none"><li>• Large seeds: 3-6 mm in diameter</li><li>• Grown in warm-climate countries</li><li>• Round shaped and light brown colour</li><li>• Sweet, aromatic flavour</li><li>• Used in spice trade</li></ul>	<ul style="list-style-type: none"><li>• Morocco</li><li>• Spain</li></ul>

Indian coriander	<ul style="list-style-type: none"> <li>• Large seeds: 3-6 mm in diameter</li> <li>• Grown in warm-climate countries</li> <li>• Oval shaped and yellow colour</li> <li>• Stronger flavour profile, more citrus notes and hints of nuttiness</li> <li>• Used in spice trade</li> </ul>	<ul style="list-style-type: none"> <li>• India</li> </ul>
Microcarpum	<ul style="list-style-type: none"> <li>• Small seeds: 1.5-3 mm in diameter</li> <li>• Round seeds</li> <li>• Grown in temperate-climate countries</li> <li>• Sweet, aromatic flavour with lemon notes</li> <li>• Higher essential oil content, preferred for the production of essential oils</li> </ul>	<ul style="list-style-type: none"> <li>• Russia</li> <li>• Bulgaria</li> <li>• Ukraine</li> </ul>

Ground coriander is used in both savoury and sweet dishes. In Europe, it is used in spice mixtures, curries, soups, minced meat, sausages, breads like gingerbread and naan, rice dishes, and sweet baked goods. Whole coriander seeds are used in marinades and pickled vegetables. Coriander seeds are also used to make gin. The Microcarpum variety is preferred for producing essential oils and oleoresins.

This study focuses on exporting coriander seeds to the European market. If you are interested in fresh coriander, please see our study on [Exporting fresh culinary herbs to Europe](#).

Table 2: Harmonised System (HS) codes for coriander seeds

HS code	Product description
090921	Coriander seeds, neither crushed nor ground
090922	Coriander seeds, crushed or ground

Figure 1: Coriander seeds



Source: [GloballyCool](#), July 2024

## 2. What makes Europe an interesting market for coriander seeds?

Europe is a stable and growing market for coriander seeds. Over the past five years, the market has grown at an average rate of 4.9% per year. Imports increased from 22,000 tonnes in 2019 to 26,000 tonnes in 2023. The peak was in 2022, with a total import volume of 30,000 tonnes. Most coriander seeds imported into Europe are whole (71%), while the rest are crushed or ground.

About 44% of coriander seed imports come from within Europe. From 2019 to 2023, this trade flow grew at an average rate of 13% per year. Poland and Bulgaria increased their exports to Europe by 31% and 21% per year, respectively. Spain also increased its exports to Europe by 18% per year.

Poland does not produce coriander seeds; it re-exports them. Poland mostly imports coriander seeds from Russia and then sends them to other European countries. Bulgaria, on the other hand, is the largest producer of coriander seeds in the EU. It grows the *Microcarpum* variety, which is rich in essential oils. Spain also produces coriander seeds, focusing more on the spice industry.

The opportunity in the European market lies in the fact that European production of coriander seeds is not enough to meet European demand. For more information see Figure 2.

Source: UN Comtrade, June 2024

\*Developing countries following [the OECD-DAC list of ODA recipients](#), “Rest of the world” refers to all other countries.

Because local production is insufficient, a large part is imported from non-European countries. In 2023, 34% of the coriander seeds were imported from developing countries and the remaining 22% from other countries. The imported volumes of both groups have remained quite stable over the last five years, with an average annual growth of 0.1% and 0.7%, respectively.

Tip:

See our study on [‘What is the demand for spices and herbs in the European market?’](#) to understand

why Europe is an attractive market for spices such as coriander.

### **Outlook for the European coriander market**

In the short term, the European coriander market may see a modest recovery in import volumes. This is partly due to expected price stabilisations following the significant fluctuations seen in 2023, where Russian imports drove prices down. Due to the expected reduction of certain weather-related challenges in key growing regions, India and Ukraine are likely to restore some of their export capacity, thus contributing to a balanced supply for European buyers.

Additionally, growing demand from the food processing industry, particularly for sauces, spice blends, and ready-to-eat meals, could help boost European imports. However, price sensitivity among European consumers, resulting from ongoing inflationary pressures, may continue to slow the growth of coriander imports, especially in 2024.

Looking further ahead, the European coriander market is expected to grow modestly. This will be the result of a combination of a growing health-consciousness among consumers and the increasing popularity of ethnic foods like curries and Middle Eastern dishes, which use coriander as a key ingredient. The rise in demand for organic spices may also boost imports, particularly from regions like India and Morocco, which are working to scale up production.

However, geopolitical factors such as continued pressure from Russian and Ukrainian suppliers, and the impact of climate change on major growing regions, could cause ongoing instability in both supply and pricing. European buyers may find several sources for their supply, in order to reduce risks, looking more toward North African and South American producers as alternative suppliers. This diversification will help maintain supply stability, but significant price fluctuations could still be a factor, particularly during years of bad weather conditions.

Overall, while modest growth is expected in coriander seed imports through 2027, Europe's demand will continue to be shaped by price sensitivity, supply chain disruptions, and an above-average growing demand for organic and sustainably-sourced products.

## **3. Which European countries offer the most opportunities for coriander seeds?**

The United Kingdom is Europe's largest importer of coriander seeds, with a 26% share of European imports. Poland (18% share of European imports) and Germany (16%) take the second and third positions. Germany is interesting due to its large food processing industry. Moreover, it is an important market for organic spices and herbs. Germany is followed by the Netherlands (10%), France (6.7%), and Romania (4.9%). Together, these countries account for 82% of Europe's total coriander seeds imports.

Source: UN Comtrade, June 2024

The turbulent situation in two of the world's main coriander seeds production countries (Russia and Ukraine) has caused several fluctuations in imports recently. While imports peaked in 2021 or 2022 and dropped afterwards for most European countries, Poland saw an increase in imports in 2023. The high inflation in Europe in 2023

had a slightly negative impact on coriander seeds imports.

## The United Kingdom: large volume imported directly from developing countries

The United Kingdom is the largest importer of coriander seeds in Europe. Imports grew by an average of 2.4% from 2019 to 2023, reaching 6.8 thousand tonnes in 2023. In 2020, Brexit did not negatively impact the imports of coriander seeds from developing countries or the volume of European imports. In 2023, the United Kingdom imported 71% of coriander seeds from developing countries, while 28% was European trade.

India is the main supplier, accounting for 51% of total coriander seed imports. Bulgaria is the second-largest supplier and has increased its share substantially over the last five years, from 8.8% in 2019 to 18% in 2023. Argentina also shows a positive trend in its exports to the United Kingdom; it has doubled its imported volume to 540 tonnes in 2023 (a share of 7.9%). Other suppliers to the United Kingdom include Ukraine (4.7%) and Italy (3.9%).

Imports of coriander seeds from the Russian Federation went down considerably in the period between 2019 and 2023. The country used to be the third-largest supplier of coriander seeds to the United Kingdom, but it has dropped to 12<sup>th</sup> position in 2023. This is caused by the ongoing war between the Russian Federation and Ukraine which began in 2022.

50% of the coriander seeds imported by the United Kingdom are crushed or ground coriander. This is a relatively high percentage compared to the other leading importing countries, where most imports are whole products.

### Curries as a popular dish for coriander in the United Kingdom

Coriander is popular in the UK as an ingredient in curry dishes and curry sauce. Historically, curry dishes became popular with the arrival of immigrants from the Indian diaspora. The United Kingdom is home to the largest Indian diaspora group in Europe at approximately 1.5 million people. Over time, curry dishes became a household staple for many British consumers. Therefore, this dish has also become very popular among the rest of the population.

However, the curry industry seems to be in decline because of growing competition from many other cuisines available in the British market. In addition, the curry industry has not diversified and is not keeping up with changes, such as changing consumer preferences for healthier foods. [The number of traditional curry houses has dropped from around 12,000 in 2011 to about 8,000 today](#). The widespread availability of curries in households, along with the ease of purchasing curry sauces and ready-to-eat meals in supermarkets, have negatively impacted the appeal of restaurants focusing on this cuisine. People are looking for more authentic food, such as Indian street food.

In mainstream supermarkets, the coriander seeds are conventional and sold in whole and ground form. They are available under the private label brands of the British supermarkets, such as [Tesco](#), [by Sainsbury's](#), and [COOK by ASDA](#), as well as other brands. Other well-known brands available on the shelves are [Schwartz](#) (McCormick), [East End](#) and [TRS](#) (part of [Vibrant Foods](#)), [Rajah](#) (Westmill Foods), [Natco](#), [Bart](#) (Fuchs Gruppe), and [Indus](#) (AIB Foods).

Coriander seeds are also used in a variety of other products that can be found in supermarkets, such as spice blends (i.e. garam masala, harissa spices), curries, naan bread, rice, couscous, ready-to-eat soups (carrot & coriander), pappadums, falafel, and houmous.

Within the organic retail market, organic coriander seeds are sold by the two leading organic retail groups [WholeFoods](#) and [PlanetOrganic](#). In general, the United Kingdom is one of the largest markets in Europe for organic and fair-trade products. For example, [Bart Ingredients](#) was the first British spices and herbs company to bring fairtrade-certified spices to British consumers. Examples of companies that import organic coriander include [Steenbergs](#) and [Cotswold](#). While Cotswold trades in conventional products and limited volumes of organic and Fairtrade spices, Steenbergs has specialised in organic and Fairtrade-certified spices.

## Poland: a hub for Russian coriander

Poland's import volume of coriander seeds varies from year to year. Between 2019 and 2021, imports grew from 2.4 thousand tonnes to 6.4 thousand tonnes. However, in 2022, there was a significant (-45%) decline in imports. In 2023, the import volume recovered (+32%), reaching 4.6 thousand tonnes. Poland had the highest average growth rate in the period 2019-2023 (+18% per year).

Poland mainly imports whole coriander seeds (98%), with only 2% being crushed or ground. The country relies heavily on Russia for its supply, with Russia accounting for 82% of the market. Other suppliers include nearby countries like Czechia (6.9% share), Ukraine (4.5%, losing market share), and Bulgaria (2.5%). Czechia is fairly new to the Polish market (since 2023).

As the fourth-largest supplier of coriander seeds to the EU, Poland also plays a significant role as a hub. The country is home to several specialised traders and processing companies. For example, [Bromex](#) specialises in the supply of spice seeds, processed cereals, and herbs. It imports coriander seeds from Eastern Europe and either supplies them as whole seeds or in halves, chopped, or ground form. Their primary markets are the meat industry and extract production. Upon request, Bromex can also sterilise the coriander seeds.

Poland re-exports most of its coriander seeds to the Netherlands (good for 26% of Polish exports), France (24%), and Austria (21%). Over the past five years, Poland has significantly increased its market share in these countries, becoming the leading supplier in all three.

There are several brands that offer coriander seeds in the Polish market. A leading company in the spices industry in Poland is the [Prymat group](#). The company is also a key producer of spices in Europe. Other brands that are available in Polish supermarkets are [Kotányi](#), [Kamis](#) (McCormick Polska), and [Royal Brand](#) (P.H. Royal).

## Germany: coriander seeds for the meat-processing sector

Imports of coriander seeds into the German market have varied over the last five years. The lowest volume was reported in 2023 at 4.3 thousand tonnes, after a peak year in 2022 at 7.0 thousand tonnes, marking a 38% decline. Overall, the imports of coriander seeds only showed a small decline in the period 2019-2023 (-1.3% per year on average). Germany is an exception; it is the only large importing country whose imports did not grow between 2019-2023.

Germany's leading supplier is the Russian Federation, good for 30% of German imports in 2023. Russia is followed by Romania (13% share), Spain (10%), Ukraine (8.8%), Bulgaria (7.3%) and Poland (6.7%). Germany's trade with European countries increased by 6.7% on average per year in the period between 2019 and 2023, while imports from developing countries and the rest of the world declined by 9.2% and 5.4%, respectively. Russia and Ukraine saw a drop in market share (-17% and -54%), while Spain and Poland both increased their share significantly (+171% and +533%).

German importers mostly import whole coriander seeds, accounting for 68% of total imports, as the whole seeds preserve flavour better than ground coriander. The coriander seed processing in Germany includes crushing, mixing, sterilisation, and packing.

Coriander seeds are a common ingredient in spice mixes for the meat industry. Germany's meat industry is well-known; it is the largest producer and exporter of sausages in Europe. Moreover, sausages are an integral part of Germans' diets, with every region having its unique type of sausage. [There are around 1500 types of](#)



sausages and Germans eat around 30kg of sausage per year. Companies like [Nubassa](#) supply the German meat industry with various spices and spice mixes, such as [coriander seeds](#), [bratwurst seasoning](#), and [cold cuts seasoning](#) (containing coriander).

In addition to the meat industry, coriander seeds are used in, for example, the sauces industry, spice mixes, and curry powders and pastes. For example, [AVO](#) is a leading spice processing specialist in Europe and supplies seasonings to a diverse range of food manufacturing companies that produce meat and sausage products, fish and seafood, ready meals, baked goods, soups and sauces.

In German supermarkets, coriander can be found in ground and in whole form. Coriander seeds are available under the private labels of the supermarkets such as [REWE Beste Wahl](#), [REWE Bio](#) (organic), and [GUT Bio](#) (organic, [Aldi Süd](#)). [REWE Beste Wahl](#) ground coriander is supplied by the Belgian company [The Spice Factory](#), while the [REWE Bio](#) ground coriander is supplied by [HerbaPack GMBH](#).

Important brands in supermarkets are [Ostmann](#), [BioWagner](#) (organic), and [Fuchs](#). These brands are all part of the [Fuchs Gruppe](#), which is an important player in the German spice market. The company supplies spices and herbs to the food retail, food service sector, and to industry customers. The group also sells spices and herbs under private label.

Germany is [one of Europe's top markets](#) for organic spices. The country accounts for 15-20% of the European organic spices market. Organic spices can be found in regular retail chains such as [REWE](#) and [Aldi Süd](#) and organic retail chains such as [Biomarkt](#) and [Alnatura](#). For example, [Alnatura](#) sells organic coriander seeds under its own brand, [Alnatura](#), as well as the brand [Lebensbaum](#) ([Ulrich Walter](#)).

In conclusion, the German market is an interesting market to target for exporters of coriander in general and organic-certified coriander in particular. The relatively low share of imports coming from developing countries (19% in 2023) indicates that there is still much to gain for exporters from developing countries.

## **The Netherlands: diversified imports and shift in leading supplying countries**

The Netherlands is the fourth-largest importer of coriander seeds. Whole seeds account for 81% of total imports. Between 2019 and 2021, imports increased from 2.3 thousand tonnes to 3.7 thousand tonnes. However, between 2021 and 2023, the imported volume declined to a total of 2.7 thousand tonnes in 2023. Overall, the average annual growth rate was still positive at 4.1%.

The Dutch import of coriander seeds is relatively diversified, with multiple supplying countries holding similar shares in the market. The Netherlands imports most of its coriander seeds from Poland (19%), followed by the Russian Federation (15%), Morocco (14%), Bulgaria (11%), and India (9.7%). Intra-European trade is gaining importance, with an average annual growth of 20%, while imports from developing countries have been declining at an average rate of 9.2%.

There has been a major shift in the top supplying countries in the past five years. This was caused by the turbulent market conditions since the war in Ukraine began, which impacted available volumes and market prices a lot. In 2019, neither Poland nor India exported coriander seeds to the Netherlands, while in 2023 they were top suppliers, ranking first and fifth respectively. Belgium and the United Kingdom also increased their shares from limited amounts to 8.2% and 6.7%, respectively. Morocco's share, on the other hand, declined by 50%, dropping from first to third position. Ukraine fell from third to eleventh position and Germany from fourth to eighth.

In Dutch supermarkets, coriander seeds are primarily sold under brand names rather than private labels, with the exception of discount supermarkets. For example, [Aldi](#) offers ground coriander under its label [De Kruiden Company](#). The leading brand available in most supermarkets is [Verstegen](#). Another brand is [Silvo](#) ([McCormick](#)), which sells its ground coriander in supermarkets [Plus](#) and [Dirk](#). In addition, [Euroma](#) is an important spices brand,

however, their coriander seeds are less widely available in supermarkets.

Coriander seeds are also sold under the name 'Ketoembar', which is the Indonesian name for ground coriander seeds. Ketoembar plays an important role in Indonesian cooking. The Netherlands has a relatively large population with an Indonesian background. Brands focused on Asian cuisine sell coriander seeds, such as Ketoembar, to different mainstream supermarket chains and ethnic food stores. An important Asian food brand is [Conimex](#) from Unilever. Other brands, including [Go-Tan](#) and [Kokki Djawa](#) (Vanka Kawat), are available in supermarkets including [Jumbo](#), [Albert Heijn](#) and/or [Dirk](#).

In mainstream supermarkets, coriander seeds are available in whole seeds and ground form, with ground coriander dominating the shelves. Conventional coriander seeds are the most common, while organic options are not readily available. In the Netherlands, coriander seeds are used in Asian dishes such as curries, soups, sauces, and marinades but also in dishes with meat, fish, and poultry. Additional supermarket products that incorporate coriander seeds as an ingredient include naan bread, pappadums, various sauces, basmati rice, and specific goat's cheeses.

Figure 4: Ground coriander in a Dutch supermarket



Source: [GloballyCool](#), July 2024

Consumers who want to buy organic-certified coriander, can either do that in the outlets of the two leading groups of specialised organic retail chains in the Netherlands ([Odin](#) and [Ekoplaza](#)), or buy it online from web shops such as [VanBeekum](#). The Netherlands is a smaller organic market than, for example, Germany and the United Kingdom. However, average growth of the organic coriander market will remain higher than the growth of the conventional market, therefore offering good opportunities for exporters of organic-certified produce.

## France: culinary and essential oils uses

France's imports of coriander seeds have been growing by 3.8% per year in the last five years with a peak in 2021 (2.0 thousand tonnes). In 2023, the total imported volume reached 1.8 thousand tonnes. Most of the imported coriander seeds are whole (70%), while the remaining part is crushed/ground seeds.

Poland has become the leading supplier of coriander seeds to France, with its market share rising significantly



from 4.5% in 2019 to 26% in 2023. Bulgaria is the second-largest supplier and also saw substantial growth (from 0.3% to 20%). Bulgaria is followed by Morocco (12% share in French imports), Spain (7.2%), and Germany (6.7%). Contrary to Bulgaria, with its large growing exports to France, there is a negative trend for Romania. It used to be the leading supplier to France but dropped to seventh position in 2023 with a 6.2% share.

Most common in the French supermarkets are conventional coriander seeds, sold in whole as well as ground form. The leading spice brand available in all major supermarkets is [Ducros](#) (McCormick). Other brands sold in French supermarkets include [La Planète des Épices](#) and [Spigol](#) (both from Cepasco), [Saint Lucie](#), [La Conquête des Saveurs](#), and [Samia](#) (focused on oriental foods). Several supermarket chains sell coriander seeds under their private label brands such as [Carrefour le Marche](#), [AUCHAN](#), and [Cigalou](#) (Intermarché).

There are also companies that sell coriander seeds through online marketplaces. In 2020, Carrefour created an [online marketplace](#) – grocery marketplace – on its French website, where vendor partners can display and sell their products. This enables customers to get access to complementary product ranges. For example, [Épices FUCHS](#) and [Vrac Bio](#) offer coriander seeds and other spices and herbs through the [Carrefour marketplace](#).

France is Europe's second-largest organic food market after Germany. Although there are no data to validate this position, France also takes a top-three position for organic-certified spices. The country is home to quite a number of organic retail formulas, including [Biocoop](#), [Naturalia](#), [La Vie Claire](#), [Les Comptoirs de la Bio](#), [Bio C'Bon](#) and [NaturéO](#). The French company [Arcadie](#) is the market leader in this segment, and also exports its spices, including coriander, to organic retailers in the Netherlands and Belgium.

France has several associations that unite various types of spice companies. The [SNPE](#) brings together companies that are involved in the crushing and packaging of peppers, spices, herbs, and vanilla, such as [Ducros](#) (McCormick) and [Saint Lucie](#). [SYMtia](#) brings together manufacturers of technological mixtures for the food industry. For example, [Beaun'Epices](#) is a producer of mixes for cured meats and charcuterie as well as spice blends for the cheese-making industry.

As a key supplier of essential oils within Europe, France is also home to several companies buying coriander seeds for the fragrance industry. For example, [Bontoux](#) is a producer of natural aromatic ingredients that works with a wide range of customers from industries including perfumery, cosmetics, and aromatherapy. It offers over [230 products from 180 different botanical species](#), one of which is coriander seeds.

## Romania: specialised in buying from Bulgaria

Since 2022, Romania has been the sixth-largest importing country of coriander seeds. In the period 2019 through 2021, Romania imported relatively small amounts of coriander seeds, varying between 720 and 860 tonnes. However, imports went up sharply in 2022 to a total volume of 2.1 thousand tonnes. In the following year, imports dropped to a volume of 1.3 thousand tonnes. The average annual growth rate came down to 12%. Together with Poland, this eastern European country has shown the largest growth of Europe's largest importing countries.

Like Poland, Romania imports almost only whole coriander seeds. 90% of the coriander seeds are imported from Bulgaria. In the past 5 years, Bulgaria's market share increased significantly. This was mostly at the cost of the Russian Federation, which saw its share dropping from 12% in 2019 to 0% in 2023. Other minor supplying countries to Romania include Ukraine (2.3% share), and re-exported and processed coriander from Poland (2.2%), Austria (1.6%), and Germany (1.4%).

Coriander seeds are available in Romanian supermarkets in both whole and ground form. A well-known brand available in Romanian supermarkets is [Kamis](#) (McCormick Polska). Other spice brands in the Romanian market include [Pronat](#) (organic) and [Compania Indiilor Orientale](#) (CIO). Some supermarkets offer coriander seeds under private labels, such as [Mega Image](#) with the [Delhaize](#) brand.

The [Fuchs Gruppe](#) also has a variety of brands in the Romanian market for several consumer groups: Fuchs,

BioWagner (organic), Cosmin, Alex (selection of Romania's most important spice blends), V6BBQ (barbecue spice blends and sauces), Mirodenia (100% natural seasonings for the Romanian market for the health-conscious consumer). The Fuchs Gruppe operates its own online shop – [Pune Gust](#) – where it offers products from all its brands to Romanian consumers.

#### Tips:

Consider entering the British market, as the United Kingdom is the largest market and imports the largest share directly from developing countries (71% of its total imports).

Consider entering the German or French markets if you want to export organic coriander seeds to Europe. Both countries are among Europe's top markets for organic spices.

Visit the website of European and national associations of spices and herbs to find out more about the market. You can also find potential buyers through their member lists. See for example, the [European Spice Association](#), [Seasoning and Spice Association](#) (the United Kingdom), [Fachverband der Gewürzindustrie](#) (Germany), [Koninklijke Nederlandse Specerijenvereniging](#) (the Netherlands), and the French associations [SNPE](#) and [SYM-TIA](#).

## 4. Which trends offer opportunities or pose threats in the European coriander seeds market?

There are several trends that contribute positively to the consumption of coriander seeds in the European market. European consumers are becoming more health conscious and therefore look for natural ingredients and ingredients with health benefits. Interest in coriander seeds is also driven by a growing curiosity in international dishes and the increasing availability of ready-to-eat meals. Social and environmental sustainability are important to European buyers. Therefore, implementing sustainable practices can improve your chances of success in the European market.

### Sustainably-produced coriander seeds in demand

Sustainability has gone mainstream in the European spice sector; both social and environmental sustainability have become important topics for European buyers. Large European spice companies have all set goals to import sustainably-sourced spices and improve transparency throughout their supply chains. Sustainability goals are either initiated by a group of companies, spice associations, or individual companies. This is explained in more detail below.

Specifically in the production of coriander seeds, key sustainability issues include the use of soil fertilisers, irrigation water, pesticide residues, adulteration, and/or labour issues.

### Sustainable Spice Initiative

In 2012, a group of mainly European companies and organisations created the [Sustainable Spice Initiative](#) (SSI) with the goal of developing a collective strategy and taking the lead in the sustainable production, processing, and global trade of spices, herbs, and dehydrated vegetables. They believe that sustainability needs to be part of their long-term strategy.

Many leading European spice companies are a member of this initiative, such as [Euroma](#), [FUCHS Gruppe](#), [Nedspice](#), [McCormick](#), [Verstegen](#), and [Catz International](#). All the [SSI members](#) have committed to the following:

- Strive for a fully-sustainable production and trade of spices.
- By 2025 at least 25% of their product categories should be sustainably sourced. By 2030 at least 50% should be sustainably sourced.
- Implement Due Diligence policies and processes by 2025, with the goal of improving transparency and fostering continuous improvement in environmental and social matters.

Furthermore, they intend to measure and reduce the products' environmental footprint and creating a positive impact on farmers and workers.

There are a few suppliers of coriander seeds from developing countries that are members of the SSI initiative, also supporting the same sustainability goals. These include [Agrin Maroc](#) (Morocco), [Swani Spice](#) (India), [Vijayakrishna Spices](#) (India), and [Jayanti](#) (India).

## European Spice Association

Since 2022, the [European Spice Association](#) (ESA) has a [Code of Conduct for responsible sourcing](#) to create more sustainable businesses. This Code of Conduct is based on UN Guiding Principles, OECD Guidelines, and the core standards of the International Labor Organization (ILO). All [ESA members](#) have to comply with the Code of Conduct.

## SAN-Nestlé partnership for Responsible Sourcing of coriander seeds

[Nestlé](#) is an example of a company committed to sustainable sourcing. With the SAN-Nestlé partnership it has implemented a [Responsible Sourcing Spices Programme](#) in India. This initiative intends to provide tailored support to farmers and communities in order to meet the Nestlé [Responsible Sourcing Standard](#), thereby contributing to a positive impact on people, the planet, and business. The initiative also intends to improve the transparency of Nestlé's spices supply chain, from the spice farms and villages up to Nestlé's factories.

The project focuses on four spices, including [coriander in the Rajasthan and Madhya Pradesh states](#) in India (two important regions for the cultivation of coriander seeds). Three suppliers and more than 200 smallholder farmers are part of the coriander project. Some of the [sustainability challenges](#) they have identified in the coriander sector in India include:

- Fertilisation management plans of the farms should be optimised: the fertilisation management plans are not adjusted to the soil conditions and crop requirements. There is a lack of labs that can conduct soil analysis.
- Pesticide control management should be optimised. Most of the farms do not keep track of pesticide use and have not implemented measures for pesticide use risk mitigation, or triple wash procedures for empty pesticide containers.
- Producers lack adequate infrastructure for post-harvest and preprocessing activities, leading to an increased risk of crop/food waste.

Overall, many European buyers are focused on sourcing sustainably-produced coriander seeds. This is why it is important for you as a supplier to offer high quality and sustainably-produced coriander seeds. This will increase your chances of success in the European market.

## International dishes are driving the consumption of coriander seeds

Coriander seeds are a common ingredient in many spice mixes, sauces, and dishes in various cultures across the globe. It is mostly used in the Asian, North African, and Middle Eastern cuisines. Examples of dishes and spice mixes include Indian curries, Garam masala, Harissa, and Ras el hanout. Many European spice companies have these spice mixes in their product ranges.

In Europe, people from Asian, North African, and Middle Eastern backgrounds are significant consumers of coriander seeds, as it is a key ingredient in their traditional dishes. For example, the United Kingdom is home to the largest Indian diaspora group in Europe for whom curry dishes are a very important traditional food.

Ethnic cuisines and international dishes have also become a regular part of many European consumers' diets. Among European consumers, the Asian cuisine is very popular, with curry flavours being favourites. As an example, in the United Kingdom, [Tesco](#) mentions that there is a new trend for cooking adventurous meals from new cuisines at home. Tesco's sales of ingredients for making Indian curries went up by 33%, ingredients for Chinese dishes by 32%, and Thai, Korean, and Japanese dishes by 15%. Tesco is expanding its range to meet consumer demand for Asian cooking.

Figure 5: Spice mixes in a Dutch supermarket



Source: [GloballyCool](#), July 2024

## Convenience trend behind growth of ready-to-eat meals

As European lifestyles become busier, consumers have less time to cook and more often opt for ready-to-eat or easy-to-prepare meals from supermarkets. Ready-to-eat meals, especially Asian curries, often have coriander powder as an ingredient.

The consumption of ready-to-eat meals has increased substantially in recent years and is expected to continue to grow significantly. [Fi Global Insights](#) reports that ready-to-eat meals make up 17% of the calories consumed in the EU. In the United Kingdom, around 90% of the British consumers eat ready-to-eat meals, of which 40% at least once per week. Between 2008 and 2023, Spain saw a 63% increase in the consumption of these meals, while for German and Italian consumers this increased between 40% and 60%.

According to [Statista](#), the European ready-to-eat market is expected to show a volume growth of 2.4% in 2025. Between 2024 and 2029, the volume is expected to grow annually by 2% and the revenue by 5.1%.

## The health and sustainability-conscious consumer

European consumers are becoming more health conscious and, as a result, are looking for products that contain natural ingredients. As such, there has been a growing interest in the health benefits of spices. Also, the popularity of coriander seeds has increased due to its health benefits.

An increasing number of people are adopting more plant-based diets, including vegetarian, vegan, or flexitarian lifestyles. This is the result of both environmental concerns and the health benefits of reducing meat consumption. According to [Statista](#), the number of vegans will continue to grow. Spices traditionally used in the meat-processing industry are now also used in plant-based meats. With this trend, the demand for spices remains stable, as similar spice blends are used in the meat and meatless industry.

#### Tips:

See our study on '[Which trends offer opportunities or pose threats in the European spices and herbs market](#)' to find out more about the trends in the spices and herbs sector.

Implement sustainability practices in your company to increase your chances of success when entering the European market. Investigate the sustainability policies of European spice companies to find out what aspects are important to take into account. For example, look at Nestlé's [Responsible Sourcing Standard](#).

Check out our news item [Sustainability: essential to success in the European spice sector](#) to learn more about sustainability in the spices sector and free tools that can help you.

Take advantage of the demand for authentic global spices: focus on selling high-quality coriander seeds and other spices used in Asian, North African, and Middle Eastern dishes. Show that your spices are real and trustworthy to attract ethnic communities and European consumers who want to cook global foods at home.

Create ready-to-use spice mixes for easy meals: produce and export pre-mixed spices for ready-to-eat meals, to target European food companies. Present these mixes as quick and easy options that give real flavours, helping busy consumers enjoy authentic meals without much effort.

[GloballyCool](#) carried out this study on behalf of CBI.

Please review our [market information disclaimer](#).