

# Entering the European market for cumin seeds

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The most important requirement for the European market relates to low-level requirements for pesticides. Plant toxin-free production, food safety certification combined with sterilisation and reliable and frequent laboratory tests are also key. Sustainable production and implementation of corporate social responsibility standards will provide additional advantages for emerging suppliers. Strong competition for new suppliers comes from Russia and India, plus Ukraine, Bulgaria and Morocco. Other emerging suppliers are from Spain, Romania and Argentina.

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## 1. What requirements and certifications must cumin seeds comply with to be allowed on the European market?

You must comply with several mandatory (legal) requirements to enter the European market. Buyers will probably have additional requirements, and they may ask for certification. Mandatory requirements for cumin in Europe have a strong focus on consumer health and safety, while sustainability requirements are also becoming increasingly important.

### What are mandatory requirements?

Most mandatory requirements related to the import of cumin have to do with food safety. The [European Commission for Health and Food Safety](#) is responsible for the European Union's policy and for monitoring the implementation of related laws.

### Official food controls

Cumin imported into the European Union (EU) undergoes official food controls. Non-compliance with [European food laws](#) is reported through the [Rapid Alert System for Food and Feed](#) (RASFF). In 2022, there were 37 cases related to cumin out of a total of 290 reported issues for all spices and herbs. This is a lot.

When imports of cumin from a particular country repeatedly violate European food regulations, the frequency of official border controls is increased. This is the case for cumin seeds from Turkey (CN code 09093100 and 09093200), where 20% of the goods are subject to checks for pyrrolizidine alkaloids (more information below).

Similarly, cumin from India faces an increased 20% frequency of official controls, but the hazard is different: the goods are tested for pesticide residues. This requirement for cumin from India is more complex than for Turkish cumin seeds. For Indian goods containing a mix of produce, where 20% of the quantity is cumin, the rule already applies, regardless of the origin. Even if the cumin does not come from India, but other ingredients are

of Indian origin, the increased frequency still applies.

### Tip:

Search the [RASFF](#) database for examples of withdrawals from the European market.

## Pesticide residues

The EU [regulation on Maximum Residue Levels of pesticides](#) sets maximum residue levels (MRLs) for pesticides in or on food products. Products containing more pesticide residues than allowed are withdrawn from the European market. In 2022, more than 60% of the issues reported in RASFF for cumin were related to excessive pesticide levels or traces of illegal pesticides. Excessive levels of chlorpyrifos residues (the MRL is 0.01 mg/kg) are the most frequent reason for border rejections reported in RASFF.

### Tip:

Select your product or the pesticide you use in the [EU pesticide database](#) for a list of relevant MRLs.

## Control of contaminants in cumin seeds

Food contaminants are substances that have not been intentionally added to food. They may be present in cumin as a result of the various stages of production, packaging, transport or holding, or environmental contamination. Contaminants can pose a health risk to consumers. To minimise these risks, the EU has set [maximum levels for certain contaminants](#) in foodstuffs:

- Plant toxins: Some toxins may be naturally present in weeds, which can contaminate cumin in the field. The most important plant toxins in cumin seeds are pyrrolizidine alkaloids (PA). Common toxic weeds that transmit PA usually belong to the genus Boraginaceae, Asteraceae or Fabaceae. Since December 2020, following [Commission Regulation \(EU\) 2020/2040](#), there are maximum limits set for PA. Cumin seeds have a limit of 400 µg/kg. At the moment of writing, more than 20 issues with PA for cumin, all from Turkey, were reported in the RASFF database.
- Microbiological contaminants: The EU regulation on [microbiological criteria for foodstuffs](#) does not set specific limits for cumin. The most important microbiological risk is salmonella. Salmonella must be completely absent.
- Polycyclic aromatic hydrocarbons (PAH): PAH can increase the risk of cancer. Because of this, the EU has set PAH limits for cumin: 10µg/kg for benzo(a)pyrene and 50µg/kg for the sum of all PAHs.
- Metal contaminants: Since 2021, the EU has set lead residue limits for spices. For cumin this limit is 0.9 mg/kg.

While EU legislation does not define maximum levels for aflatoxins in cumin, different national legislation on aflatoxins may apply. The same goes for microbiological contamination limits (with the exception of salmonella).

### Tips:

Check the national legislation in your target countries through the ['My Trade Assistant' tool](#) at

[EUAccess2markets](#) to see if country-specific legislation for cumin seeds is in place.

Comply with the Codex Alimentarius [Code of Hygienic Practice for Low Moisture Food](#) (CXC 75-215) and the International Organization of Spice Trade Associations' General Guideline for [Good Agricultural Practices on Spices and Culinary Herbs](#) to prevent microbiological contamination.

Consider heat sterilisation as a natural, chemical- and radiation-free option. Since heat sterilisation equipment is rather expensive, it might be interesting to use a third party.

Apply Integrated Crop Management to prevent PA contamination. Use a safe planting distance from potential risk areas and remove weeds in their early stages.

## Labelling requirements

Each export package should declare:

- Name of product, such as 'grounded cumin'
- Batch code
- Net weight in metric system
- Shelf life of the product or best-before date, and recommended storage conditions
- Lot identification number
- Country of origin and name and address of the manufacturer, packer, distributor or importer

The lot identification and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark. A label can also include details such as brand, drying method and harvest date. These batch details can also be included in the Product Data Sheet (this may be also called a Technical Data Sheet, Product Specification Sheet, or something similar). This document contains the specific characteristics of your product, which your buyer will ask for to assess it. Check this example for [organic cumin seed](#).

In the case of consumer packaging, product labelling must comply with the [EU Regulation on the provision of food information to consumers](#). This regulation defines nutrition labelling, origin labelling, allergen labelling and minimum font size for mandatory information more clearly.

Figure 1: Consumer label of ground cumin



Source: [Globally Cool](#)

If you supply organic cumin, your label needs to include the name/code of the inspection body and certification number.

### Tip:

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

## What additional requirements and certifications do buyers ask for in cumin?

European buyers often have additional requirements, in addition to the legal obligations. These often concern the European Spice Association's (ESA) quality minima for spices. Others relate to food safety and to sustainable and ethical business practices.

### Quality requirements for cumin seed

Several factors determine the quality of cumin seeds, some as subjective as taste or flavour. Other quality criteria relate to the cumin cultivar, such as size of the seeds, shape, or colour. However, the same cultivars can have different qualities, even when produced in the same country, as quality is influenced by implemented agricultural practices, climatic conditions during the production season and post-harvest operations. Several quality parameters are also set by the Codex Alimentarius Commission in the [Codex Standard CXS 327-2017 for Cumin](#).

The most common parameters for cumin seeds quality include:

- Cleanliness or purity: Cumin seeds should be intact when traded as a whole, and they must be free from diseases, foreign matters, foreign odours, and any other disorders. The European Spice Association (ESA) [Quality Minima Document](#) does not allow the presence of any foreign objects greater than 2mm in diameter and proposes that the maximum presence of external matter should be below 1% of the weight. Other indicators include ash level and acidity of the ash.
1. In the cumin trade, the [ASTA Cleanliness specification](#) is commonly used to determine the cleanliness of cumin seeds by analysing a sample of the seeds. Usually, cumin seeds intended for the European market are of 99.5% - 99.99% purity and preferably sorted by an optical sorting machine.
- Moisture content: The maximum moisture content for cumin seeds and powder set by the [Quality Minima Document](#) of the ESA is 13%, but according to the Codex Standard it is 10%. Still, buyers may request a lower moisture content such as 7-9%.
  - Mesh or particle size: When cumin seeds are exported in powdered form, they are ground to pass through a sieve of a specific diameter. Sieves are often specified in micron sizes and typical requirements demand that 95% to 99.5% of ground cumin seeds pass through the specific size of the sieve, usually 500-600 microns. As cumin seeds are fibrous, the size of the sieve is usually larger compared to most other ground spices, such as pepper or chillies.
  - Odour and flavour: Cumin seeds must have a characteristic odour and flavour. The flavour profile of cumin seeds mostly depends on the chemical components of the essential oil. The most important essential oil in contributing to the specific flavour is cuminaldehyde (4-isopropylbenzaldehyde). The flavour profile varies depending on the variety, cultivar, geographic, climatic, and growth conditions.
  - Volatile (essential) oils: As described above, the content of essential oils is important for the sensorial characteristic of cumin seeds. Cumin seed quality is higher when the percentage of ash is low, and the content of essential oils is high. The minimum content of essential oil in cumin seeds should be 1.5 ml/100 g, but the oil content in first grade quality should be above 2 ml/100 g.

### Packaging requirements

Cumin seeds are mostly exported in bulk and packed in multi-wall laminated bags of different weights. Common weight classes are 12.5 kg and 25 kg. The dimensions of the selected packaging size should conform the conventional pallet sizes (800 mm x 1,200 mm and 1,000 mm x 1,200 mm). Please note that in some European countries, labour health and safety legislation allow workers to lift a maximum of 20 kg, so smaller weights of packaging are increasingly used, such as 10-20 kg.

The net weight of retail packaging is usually between 20g and 40g. Retail packaging includes glass containers, plastic bags, plastic containers, and paper bags. Transparent glass containers are particularly popular, as they enable consumers to see and visually inspect the product before buying.

Figure 2: Common packaging of cumin in retail, 40 and 80 grams



Source: [Globally Cool](#)

## Food safety certification

Food safety is essential for the European market. While legislation already prevents many risks, this isn't sufficient. For that reason, importers prefer to work with producers and exporters who have a [Global Food Safety Initiative](#) (GFSI) recognised food safety system certificate.

For spices and herb processors and traders of cumin, the most popular certification programmes are:

- [Food Safety System Certification](#) (FSSC 22000) is the most important certification program and gives access to almost all countries in the world.
- [International Featured Standards](#) (IFS) can be relevant if European buyers ask for it.
- [British Retail Consortium Global Standards](#) (BRCGS) can be relevant if European buyers ask for it.

Such a third-party certified programme is an asset to your company and is appreciated by new buyers. Nevertheless, serious buyers might also visit and/or audit the production facilities of new suppliers.

## Sustainability compliance

Although less important than product and food safety requirements, social and environmental compliance is increasingly demanded by European buyers. This often means that the supplier must undersign the buyer's code of conduct. Another possibility is that buyers ask for certification against a third-party scheme such as Rainforest Alliance.

Codes of conduct (CoC) vary from company to company, but they are often similar in structure and the issues they cover. In 2022, ESA published a guideline for their members. Since many European spices and herbs companies are ESA members, you will likely come across this guideline sooner or later.

Under this [sustainability code of conduct](#), ESA members shall monitor their own and their suppliers' operations.

### Tip:

Always ask your buyer for their specific packaging requirements.

Use methods of analysis and sampling recommended by ESA from Appendix 2 of the [Quality Minima Document](#), to determine quality parameters for cumin seeds.

Read more about payment and delivery terms in the [CBI Tips for organising your spices and herbs exports](#) to Europe.

## What are the requirements for niche markets?

Most additional buyer requirements apply to the mainstream spices and herbs markets. However, some niche markets have their own, specific requirements. Ethnic certification can be interesting for the large and growing ethnic food segments. [Fairtrade](#) lays down requirements for sustainability in the social, environmental and ethical domains. Product certification for the organic market mainly focuses on environmental requirements.

## Ethnic certification

Islamic dietary laws (Halal) propose specific dietary restrictions. If you want to focus on this market segment, consider implementing a Halal certification scheme.

## Organic certification

If you want to sell your spices and herbs as organic in Europe, they must be grown using organic production methods that comply with [EU organic legislation](#). Growing and processing facilities must be audited by an accredited certifier.

## Fairtrade

The fairtrade market is built on fairtrade certification. Each player in the supply chain needs to be certified to participate in this market. The fairtrade market is privately regulated.

[Fairtrade International](#) has a specific [standard for herbs, herbal teas and spices](#) from small-scale producer organisations. This defines [minimum prices and price premiums](#) for conventional and organic products from several countries and regions. Cumin has no fixed Fairtrade Minimum Price or fixed Fairtrade Premium, so the Fairtrade Premium is set at 15% of the commercial price.

There are currently (as of May 2023) six [Fairtrade certified cumin seed producers](#) in Egypt (two of which also have a trade function), three in Sri Lanka, two in Uzbekistan, one in Thailand and one in India. This is the same number as in May 2021. In addition, there are fairtrade-certified companies for cumin with the following functions: traders (21), manufacturers and processors (12), and intermediate distributors (4).

## Dual certification

Having organic plus fairtrade certification is a clear asset in both the European fairtrade and organic markets. Consumers in these markets are typically more conscious than mainstream consumers. Because of that, they are more likely to appreciate and buy products that have both a fairtrade and an organic certification logo.

### Tips:

Read [CBI's study on requirements for exporting spices and herbs to the European market](#) for a complete overview of requirements, including organic and fairtrade certification.

Check the [guidelines for imports of organic products into the EU](#) to familiarise yourself with the requirements for European traders.

Consult the ITC [Standards Map](#) for a full overview of relevant certification schemes and their requirements.

Check Fairtrade International's [standard for herbs, herbal teas and spices](#) and other [Fair Trade Standards](#) relevant to your production, processing and trade.

Try to combine organic certification with other sustainable initiatives (dual certification) to increase your competitiveness.

## 2. Through what channels can you get cumin seeds on the

## European market?

Cumin seeds are sold through different channels to reach the different segments: retail, food service and ingredients. Whole cumin seeds are used in all segments, while ground cumin seeds are mostly used by spice manufacturers to create specific spice mixes or to create customised spice solutions for the food industry. Most cumin seeds are imported whole and crushed after import. One main exception is the curry industry in the United Kingdom, which imports large volumes of ground cumin.

## How is the end market segmented?

The end-market segments for cumin seeds include retail, food processors and foodservice.

Figure 3: End-market segments for cumin seeds in Europe



Source: [Autentika Global](#)

## Food processors

Food processors use the largest amount of cumin seeds on the European market. The largest users are spice mixture producers, the sauces and seasonings industry and other processors such as meat and cheese producers.

- Spice mixture and ingredient producers – These producers specialise in the production of spices and seasonings for different applications. They are constantly investing in research to develop custom formulations for the food processing industry and help launch new attractive tastes. Examples of these companies include leading spice companies already mentioned in the retail chapter above. Aside from curry and other Asian, Turkish, North African and Middle Eastern spice mixes, cumin powder is an important ingredient in chilli powders, in addition to chilli peppers.

Apart from spice companies, several other producers make customised (dried or liquid) spice solutions for specific industry needs. Examples of spice mixtures and ingredients companies include [OSI Food Solutions](#), [AVO](#) (German producer, part of the European group), [Meat Cracks](#), [Colin Ingredients](#), [Kerry Ingredients](#), [Solina Group](#), [Frutarom](#), [Farevelli Group](#), [Food Ingredients Group](#), [Kalsec](#), and [EHL Ingredients](#).

- Sauces and condiments industry – This industry uses cumin seeds mostly in powdered form, to create specific products. In this sub-segment, most cumin seeds are used to produce specific curries and sauces. The curry sauces industry includes brands such as [Patak's](#), [Rajah](#), and [Sapna](#).
- Other industries include meat processors, cheese producers and ready meals producers.

## Retail

European (often national) brands and private labels share the retail and food-service segments. Leading brands in Europe include [Schwartz](#) (United Kingdom), [TRS](#) (United Kingdom), [Fuchs](#) (Germany), [Ducros](#) (Spain, France, Belgium, Portugal), [Euroma](#) (Netherlands), [Verstegen](#) (Netherlands), [Cannamela](#) (Italy), [Santa Maria](#) (Scandinavia), and [Prymat Group](#) (Poland). [McCormick](#) is the global and European market leader, present in Europe with several brands, including [Drogheria](#), [Kamis](#), [Margao](#), [Ducros](#), and [Schwartz](#).

Supermarket private label brands are important as well. Production for all these brands is conducted by European spice packers and blenders. Since supermarkets often require frequent and regular shipments and have very specific requirements regarding packaging, it is very difficult to supply to them directly from outside Europe. Cumin seeds already packed in origin countries can be found in some European ethnic shops, such as Asian, North African and Middle Eastern food stores.

Most retailers sell individually packed cumin seeds or specific mixtures with cumin seeds as an ingredient. Overall, spice and herb mixtures are becoming more popular in the retail segment, partly due to the increasing interest in ethnic food. Curry and garam masala mixes are established mixes with cumin seeds powder, but several other mixes are also becoming popular.

The retail sector can be further segmented into several subcategories like described below.

- Food retail chains - Increasing the market share of their private labels is the main development for leading retail chains. Companies that hold the largest market shares in Europe are Schwartz Gruppe (Lidl and Kaufland brands), Carrefour, Tesco, Aldi, Edeka, Leclerc, Metro Group, Rewe Group, Auchan, Intermarché, and Ahold (Delhaize or Albert Heijn). Examples of ethnic retail chains selling cumin seeds are Asian ([Wah Nam Hong](#) or [Go Asia](#)) or Turkish ([Marmara](#) or [Eurogida](#)) stores.
- Independent ethnic grocers – Cumin seeds are often sold by specialised ethnic shops such as Indian, Pakistani, Turkish, North African and Middle Eastern shops. The UK has a particularly high presence of ethnic shops selling cumin seeds. Some examples are [Taj Stores](#) (Bangladeshi with range of international offers), [Indian Spice Shop](#) (Indian) or [the Asian Cookshop](#) (Asian). In Germany, there is also a large number of Turkish grocery shops selling cumin seeds, some of them have already grown into supermarket chains.
- Specialised spice shops – Spice shops usually belong to the high-end market segment and offer a wide range of spices from different origins. They commonly sell spices measured by weight but also have their own branded products. Some of them have grown into specialised chains such as [Alfons Schuhbeck](#), named after the Germany celebrity chef, with many shops across Germany. Examples of specialised (mostly online) spice shops in Europe are [Épices Røellinger](#) (France), [Van Beekum](#) and [De Kruidenbaron](#) (Netherlands) and [Spice Mountain](#) (UK).
- Specialised organic and health food shops – Specifically relevant for suppliers of organic certified cumin seeds. Many organic shops are part of specialised organic food retail chains, especially in Germany. Examples are [Biomarkt](#), [DM](#) and [Alnatura](#). Organic food, including cumin, is also sold in specialised health food stores together with food supplements, herbal teas and other health products (for example by [Holland & Barrett](#) in the UK, Ireland, the Netherlands and Belgium). Some organic retailers import directly.
- Online food retail – Online retail is currently dominated by the leading retail chains. Specialised online retailers selling food exclusively online are still rare, with [Ocado](#) (UK) and [Picnic](#) (Netherlands) being the most notable examples. The Covid-19 pandemic and the measures imposed as a result in many countries in Europe have dramatically increased online food retail orders in Europe. Last, there are examples of Asian shops selling spices, including cumin, such as [Red Rickshaw](#), [the Asian Cookshop](#) or [Spices of India](#).
- Street markets – Although the market share of street markets has decreased significantly over the last decade, street markets are still a popular place for food shopping in Europe. Across Europe, street markets are operational on certain days of the week and sellers often move from city to city to offer their products. For example; [Quinn's Market](#) in London.

## Food service segment

Specialised distributors supply the food service channel, which includes hotels, restaurants, catering, and institutions. These distributors can import cumin seeds directly, but they often buy from wholesale bulk importers. The food service segment often requires specific packaging of cumin seeds, which is different from bulk or retail packaging, for example, from 300 g to 1 kg packs. Examples of distributors supplying the food service segment with cumin seeds are [Metro Cash & Carry](#) and [Brake Brothers](#).

Cumin seeds are an important ingredient in South Asian restaurants and in restaurants that serve curry dishes. Most curry restaurants are in the United Kingdom. Illustrative examples include [Bill's](#), and [Chennai Dosa](#) (a chain of South Indian restaurants). Many curry restaurants in the UK are opened and managed by people with Bangladeshi backgrounds. Another segment, mostly found in Germany, is Turkish-style fast food stores.

Some distributors specialising in supplying to the ethnic catering segment are [Giro Food](#), [SPL](#), and [P&B Foods](#).

World cuisines, healthy food and food enjoyment are the major driving forces in the food service channel in Europe. The fastest-growing business types are likely to be new, focusing on healthier fast food, street food,



pop-up restaurants, international cuisines, and sandwich bars.

### Tips:

Study the exhibitor lists of large trade fairs, such as [ANUGA](#), [SIAL](#) and [Alimentaria](#), to find potential buyers for your cumin seeds. If you intend to supply to supermarket private labels, search for opportunities at [PLMA](#), the world's leading private label trade fair.

To find potential buyers for your cumin seeds in the food ingredient segment, search the list of exhibitors at the specialised trade fair [Fi Europe](#).

To supply to the food service segment, visit [Sirha](#) or and [Internorga](#). If you are interested in serving the curry restaurants segment in the United Kingdom, find more information on the website of the [Bangladeshi Caterers' Association](#).

## Through what channels does a product end up on the end-market?

Specialist spice importers are the most important channel for cumin seeds in Europe. However, sometimes cumin seeds can be placed on the market through agents, or directly to food processors or food service companies. Some wholesalers have packing facilities and supply private label cumin seed brands.

### Importers and wholesalers

Importers and wholesalers can be general spice importers or specialised in specific roles. Some deal exclusively with ingredients aimed at the processing industry, while others pack cumin seeds for retail chains. Some importers also deal with a broader range of products in addition to spices, such as grains or pulses.

The higher requirements from retailers determine the supply chain's dynamics from the top down, putting pressure on importers and food manufacturers. This pressure forces prices down, but also brings more products to the market that have added value qualities, such as sustainable, natural, organic, and fair trade.

Remaining attractive for large retailers requires transparent, short, and effective supply chains. To achieve this, many importers develop their own codes of conduct and build long-lasting relationships with preferred suppliers from developing countries.

Several sub-types of cumin seed importers include the following:

- Bulk spice importers – In Europe, this category includes wholesale traders and owners of retail brands. Many of these brand owners have already been mentioned in the market analysis of this study. Some other bulk importers and wholesalers include [British Pepper & Spice](#) (United Kingdom), [AKO](#) (Germany), [Husarich](#) (Germany), [Nedspice](#) (Netherlands), [Euroma](#) (Netherlands), [European Spice Services](#) (Netherlands), [Saran Enterprises](#) (Poland), and [ISFI Spices](#) (Belgium).
- Ethnic food importers – These importers specialise in supplying the ethnic food service segment and ethnic shops. Very often, these traders import branded products or packs that are smaller than typical bulk packs, such as 1 kg – 5 kg. Examples include [Alamgeer](#) (United Kingdom), and [Kreyenhop & Kluge](#) (Germany). Some of them specialise in supplying to specific industries, such as the meat processing industry, for example, Germany's [Scheid](#).
- Spice mixes and ingredient suppliers – These traders specialise in supplying to a wide range of food industries. This category includes businesses such as [Kerry Ingredients](#) (Ireland), [Worlée](#) (Germany), [Culinar](#) (Sweden), [Epos](#) (Netherlands), and [Colin Ingredients](#) (France).
- General importers – Importers in this segment also import several other types of products in addition to

cumin seeds. For examples [Eric Bur](#) in France.

Figure 4: Trade channels for cumin seeds in Europe



Source: Globally Cool

## Agents and brokers

Brokers and agents are intermediaries that bring buyers and sellers together. They charge a commission for their services. Agents and brokers are an interesting option if you have a special product, such as high-quality or sustainable cumin seeds, for which buyers are harder to find. The role of the agent is slowly diminishing due to the increased transparency demanded by the market. Another role agents play is to participate in tenders launched by European retailers. In this case, agents can help exporters to place cumin seeds directly in the European retail segment.

## Other channels

For an overview of different food processing segments and retail using cumin seeds, read our chapter about market segments above.

## What is the most interesting channel for you?

Spice importers are the best contacts for placing cumin seeds on the European market. This is especially relevant for new suppliers, because supplying the several segments directly is very demanding and requires extensive quality and logistical investments. Another important channel is ethnic food importers, these companies are used to buying in a wide range of countries comparable to yours.

For well-equipped and price-competitive producers, packing for private labels can be an option. Private label packing is often done through importers that enter into partnerships with retail chains in Europe. As labour costs in Europe are increasing, importers of cumin seeds sometimes search for opportunities to pack spices in developing countries, but only if they can ensure full traceability and quality control.

### Tip:

Search the [members' list](#) of the European Spice Association to find buyers from different channels and segments.

## 3. What competition do you face on the European cumin seeds market?

India and Turkey are the two main competitors for cumin seed supplying countries to Europe accounting for more than 85% of European imports from developing countries. Especially India is the supplier to keep an eye on, because they are the world's leading producer with a high number of processing and exporting companies.

### Which countries are you competing with?

Europe imports most of its cumin seeds (70%) from only four countries: India, Turkey, Vietnam (a new emerging market) and Syria. Of the 20.4 thousand tonnes imported to Europe, India accounts for 52%, followed by Turkey (8.4%), Vietnam (4.8%) and Syria (4.0%). Other countries export relatively small quantities to Europe: Pakistan,

Egypt, China, Indonesia and Argentina.

Source: UN Comtrade

## India: the world's leading cumin seed producer

Cumin makes up around 7-8% of India's total spice exports. The country is believed to produce over 70% of the world's cumin. In the 2021/22 season, over 1 million hectares of land in India were dedicated to cumin cultivation, with a yield exceeding 725 thousand tonnes of cumin seed. This was lower than the country's cumin production in the two previous years (795 thousand tonnes in 2020/21 and 912 thousand tonnes in 2019/20).

Cumin production takes place in the two states Gujarat and Rajasthan. In 2021/22, Gujarat contributed 420,000 tonnes and Rajasthan produced 303,504 tonnes.

One of the major problems in Indian cumin production is locust swarm attacks. Another problem India faces is the high level of pesticide residues. Although the situation is improving, Indian cumin exports regularly were reported in the Rapid Alert System for Food and Feed due to too high pesticide residues. The good thing is that Indian producers are increasingly implementing integrated pest management (IPM) programmes, especially in Rajasthan in north-western India.

Europe is a relatively small market for Indian cumin seeds export, accounting for 4-6% of Indian exports. Indian exports of cumin seeds to Europe reached 11 thousand tonnes in 2022, which was 52% of total European cumin imports. The UK is the main target market for Indian cumin, accounting for almost 38% of Indian exports to Europe, followed by the Netherlands, Spain and Germany (at 10-15% each).

European companies import 80% of Indian cumin seeds as whole. Crushed and ground cumin seeds are mostly imported by ethnic brands and producers of curry sauces within the UK.

## Turkey: production under pressure

The main producing regions of cumin seeds in Turkey are Afyon, Denizli, Polatli, Eskisehir and Sanliurfa. Turkish annual production is around 6 thousand tonnes. Harvest of cumin seeds in Turkey is organised in August - September. To supplement its own production, Turkey imports significant quantities of cumin seeds mostly from India, Iran, Syria and Afghanistan. In 2022, Turkish import of cumin seeds was larger than its export volume. Next to cumin seeds, Turkey is an important producer and exporter of black cumin and black cumin oil.

Turkish export of cumin seeds showed a decrease of 31% in 2022, reaching 7.2 thousand tonnes and worth €23 million. Turkey exports over 81% as whole cumin seeds and the remaining 19% as crushed or ground. Two main markets for Turkish cumin seeds are Egypt and Morocco. In 2022, Turkey exported 1.7 thousand tonnes to Europe. Within Europe, the main market for Turkish cumin seeds is the UK, with a 26% share, followed by the Netherlands (15%) and Germany (13%).

Turkish cumin seeds are recognised for their good quality and commonly fetch higher prices in Europe compared to Syria and India. A lot of value adding is performed in the Izmir free trade zone, where many cleaning, packing, grinding, and sterilisation facilities are located.

The main problem Turkish suppliers face in exporting to Europe is the presence of pyrrolizidine alkaloids, a plant toxin that is transferred from weeds. Currently, sustainable agricultural practices are being promoted heavily in Turkey, which has led to an increase in cumin cultivation across the country. This increase may have been temporary, since in 2022/23 the Turkish government decided to remove cumin from its list of irrigation crops. This is very likely to have a negative impact on Turkish export volumes in the years to come.

## Vietnam: processing of imported cumin seeds from India

Vietnam is an emerging supplier with exports growing to almost 2 thousand tonnes in 2022. Most Vietnamese exports are crushed cumin made of imported cumin seeds from India: 970 tonnes of cumin seeds went to Europe, mostly to the Netherlands (630 tonnes, 65% share of Vietnamese exports to Europe) and the UK (210 tonnes). Another large market for Vietnamese cumin is the USA (over 450 tonnes).

## Syria: pesticide-free, high-quality cumin seeds

Cumin seeds are one of the most important agricultural crops in Syria. The cumin seeds harvesting season in Syria starts in April/May. [Syria used to produce about 50 thousand tonnes of cumin every year](#), but the output has dropped sharply in the past few years. The main cumin production region in Syria is Aleppo with more than half of the country's output, followed by Idlib, Hama, Al Rakka, Al-Haskah, Homs and Marat Al Nu'man.

The largest markets for Syrian cumin seeds are Turkey, Egypt, Spain, Germany and France. European imports from Syria reached 810 tonnes in 2022, a drop of 44% compared with 2021 exports. The largest European importer of Syrian cumin seeds is Spain (almost 35% of Syrian exports to Europe), followed by Germany (almost 20%) and France (16%).

Most of the local production is exported and Syria has relatively high export prices. One of the reasons for this is a very low usage of pesticides in production and the offer of organic and pesticide-free cumin seeds. Also, Syrian cumin seeds have a strong flavour. Despite the attractiveness of Syrian cumin seeds, India has gained market share from Syria because the war in Syria has caused many problems and some multinationals have banned Syrian products.

## Pakistan: supplier of organic cumin to the United Kingdom

Pakistan's exports of cumin seeds are small and concern local produce and to some extent also produce from neighbouring countries Afghanistan and India. Most of the exported cumin is crushed and goes to the UK. [This cumin sold in the UK](#) (4 tonnes in 2022) is organic-certified and comes from the Balochistan region.

## Egypt: small and declining supplies to Europe

Egypt supplies mostly Saudi Arabia and Morocco with cumin, and imports significant quantities of cumin seeds from India and Syria to supplement its own production. Egypt is present in Europe with relatively small quantities. Egyptian supply to Europe decreased from over 200 tonnes in 2018 to 110 tonnes in 2022, resulting in a small decline in its share of European imports.

### Tips:

Regularly visit leading European trade fairs such as [ANUGA](#), [SIAL](#), [Biofach](#) and [Food Ingredients](#) to meet your competitors.

Visit the website of the [Indian Spice Board](#) to stay up to date about Indian production and supply.

## Which companies are you competing with?

Hundreds of Indian companies export cumin seeds. Many of them do not perform any processing activities but act only as brokers. However, several large companies perform a full range of control and processing operations before exporting. The three examples below are just an illustration, as it is not possible to describe all Indian exporters.

## ITC Spices from India

[ITC Spices](#) is part of the ITC Limited, an Indian company that has thirteen businesses in five segments including cigarettes, fast moving consumer goods, hotels, packaging, paper, and agribusiness. ITC Spices is a unit of ITC's Agri Business Division, working with over 10 thousand producers of different spices with a crop area of over 35,000 hectares. Cumin seeds are just one of the spices ITC Spices processes and exports. A competitive advantage of ITC Spices is their strong focus on safe and traceable production.

The company invests in integrated pest management and it is one of the few companies to be equipped with an internal laboratory, able to test almost 300 different pesticide residues. Furthermore, ITC Spices uses steam sterilisation equipment and optical sorting machines to deliver high-quality spices. They use a bar code traceability system where each bag is tracked back to the farmer. ITC works closely with farmers to promote best farm practices. For example, one field staff member is connected with 50 farmers across more than 200 villages.

Sustainability is also one of their unique selling points. They have a Rainforest Alliance-certified cumin production of nearly 900 ha, with 58 farms involved. In addition to environmental sustainability, they promote labour sustainability and investments in rural communities. This includes improving infrastructure in schools, providing drinking water facilities, solar street lighting, bus shelters and other community infrastructure. Also, they support farmers in getting additional income with artificial insemination and animal husbandry services.

## Laxmi Enterprises from India

[Laxmi Enterprises](#) is another company with a sustainability focus, which has been awarded several times as a Unilever Sustainable Supplier. To use water sustainably, they collect and recycle rainwater. Also, they organise regular training for farmers and encourage women to run village laboratories. The company also invests in modern quality equipment such as cleaning systems, steam sterilisation and allergen testing.

## Jabs International from India

[Jabs International](#) is one of the largest spices exporters in India. In addition to spices, Jabs also exports herbs, oilseeds, raisins, and pulses and beans. Jabs has received the Indian Spices Board's prestigious "topmost exporter" award, several times, for being the largest cumin seeds exporter in India. Jabs exports cumin seeds to 75 countries across the globe. The company has two processing facilities in Gujarat state (in Mundra and Unhja) equipped with modern machinery for cleaning, hulling, grinding, and packaging lines.

## Kütas Group from Turkey

[The Kütaş Group](#) is famous for its oregano export. They also process many other spices in its sourcing and sterilisation unit Sanita Gıda Sterilizasyon Ve Kurutm, known as Safe Spice. Due to their high quality and processing capacities, Kütaş is also one of the leading Turkish cumin seed exporters. The Kütaş Group has obtained organic certification for Europe, the USA and Japan, and is also GlobalG.A.P- and BRC-certified. In 2023 the company will be back at Anuga and FIE, after an absence of several years due to Covid.

### Tips:

To successfully penetrate the European cumin seeds market, you need to study your competitors' different strategies, including being price competitive, offering safe and good-quality products, offering unique products (such as cultivars with high essential oil content and a specific flavour profile), or customise your product to specific segments, such as organic or for alcoholic beverages.

Participate in the [International Spice Conference](#) to learn more about cumin seed competition and to get updates about the cumin seed market.

Use the services of your national export promotion agency and actively participate in the creation of

export strategies. The [Spices Board of India](#) is a good example of an export support organisation.

## Which products are you competing with?

Cumin seeds have a unique flavour profile, so it is not easy to find another spice that is similar enough to be effectively used as a replacement. Several culinary sources list caraway seeds as a substitute to replace cumin, but caraway has a different aroma and taste. However, caraway seeds are more famous in Europe and specifically used in bakery products. Also, caraway seeds are used in herbal tea mixes, while the health benefits of cumin seeds are not widely known among European consumers. Most European consumers are not significant users of cumin seeds, except for some ethnic minorities, so it is important to promote cumin seed use.

### Tips:

Read the [CBI outlook and statistics study](#) to learn more about spices in growing demand, which are potential competitors to cumin seeds.

Use opportunities to promote cumin seed use through popular culinary TV shows and channels in Europe, such as [Food Network](#) or [24 kitchen](#).

## 4. What are the prices for cumin seeds?

Margins for each actor in the cumin seed supply chain are imprecise because they depend on many factors. Most cumin seeds are sold as an ingredient and price margins related to retail prices are not the best way of gaining market insights. Cumin seed prices show frequent fluctuations mostly depending on the production volumes in the main producing countries, primarily India.

Retail prices in European supermarkets vary per brand and type of cumin seeds. The price per kilo of whole cumin seeds sold under established European brands in common retail packs of 30 g to 50 g was usually up to €60/kg, but has gone up in recent years to levels of €100/kg in the run of 2023. This was an effect of reduced harvests in India, higher production prices, and growing inflation in the European market.

On average, the larger the unit size, the lower the price for the cumin, whether it is ground or not. Commonly, prices of packs of glass containers are higher than plastic containers or bags.

The price breakdown below is a very rough indication of margins for cumin sold to the retail segment. Many factors contribute to the price, like quality, variety, origin, sterilisation costs, food safety certification costs, taxes, sales, and network margins.

Table 1: Cumin price breakdown, example with prices of June 2023 (€/kg)

Steps in the export process	Type of price	Price	Added value	Realised margin	Share of the retail price

Raw material price, whole farmers quality	Farmers gate price	6			8%
Transport to factory, cleaning (including product loss for EU estimated at 10%), processing, quality control, packing and export of whole cumin seeds	FOB origin price	8	2	33%	10%
Storing, finance, insurance, handling and shipping	CIF price	9	1	13%	11%
Processing, cleaning, sterilisation, grinding (product loss in these steps is estimated at 5%), quality control and retail packing 35-50 gr	Ex-works price	15	6	67%	19%
Selling retail packed product to retailers	Wholesale price	20	5	33%	25%
Retail sales of the final packed product (mostly between 35-50 gr in supermarkets)	Retail price	80	60	300%	

Source: [Globally Cool](#), based on industry sources

### Tips:

Subscribe to [Mintec](#) and [ISH Markit](#) to receive regular and timely updates on cumin seed export prices.

Monitor Indian domestic cumin prices on the [Spice Board of India](#) website, under 'Marketing'/'Trade Information'/'Price'.

[Autentika Global](#) carried out this study and [Globally Cool](#) updated it on behalf of CBI.

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