

SPICES
MARKET INSIDER



Market News Service

Spices

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Spices News and Updates

A round-up of news items in October 2016

Chili – The market is looking forward to the next harvest, and while the forecast for the crop is good, the expectation is that prices will stabilise and possibly firm.

Turmeric –Demand and pricing are stable, with expectations for good supply to the market from the new crop.

Black pepper – stable pricing.

Vanilla market continues in turmoil

The poor quality of the major Madagascan crop has been confirmed, together with similar conditions for the other origins. Extremely high prices to growers for the fresh beans resulted in widespread early harvesting as growers feared beans would be stolen, resulting in very low cured bean quality. The industry is increasingly concerned that this could do long term structural damage to the sector. The Sustainable Vanilla Initiative (SVI) is the international industry's response to this.

The Sustainable Vanilla Initiative (SVI) is a voluntary industry initiative, which aims to promote the long-term stable supply of high quality, natural vanilla, produced in a socially, environmentally and economically sustainable way, benefiting all partners along the value chain. The SVI is hosted by [IDH, the Sustainable Trade Initiative](#) in collaboration with US-based [Sustainable Food Lab](#) (SFL).

The SVI aims to improve vanilla bean farmers' livelihoods and assure the long-term stable supply of high quality natural vanilla. The program liaises with vanilla exporters, producers, sector organizations and public authorities worldwide to progress issues of governance, traceability, labor rights and technical assistance to grower groups.

SVI was launched in 2015 in response to a shared sense of purpose from international food manufacturers and vanilla industry to improve sustainability and quality in vanilla production, with an initial focus on Madagascar, the world's largest vanilla producing country. The initial objectives of SVI are to:

1. Grow the supply and market for **sustainable vanilla**
2. Contribute to better **livelihoods** for vanilla farming households
3. **Improve quality** by significantly reducing early harvesting of green vanilla and addressing improper vacuum packing

The Sustainable Vanilla Initiative works closely with companies and multi-stakeholder sector organizations in vanilla origin countries to develop and support long term improvement strategies.

Vanilla & cocoa sustainability

Barry Callebaut and Prova are to launch a joint project empowering vanilla farmers as part of their corporate sustainability programmes.

Barry Callebaut, the world's leading producer of high-quality chocolate and cocoa, and Prova, one of the world's premier manufacturers of vanilla extracts and flavors, are joining forces to launch a novel project in Madagascar. The aim is to diversify and stabilize revenues of vanilla farmers through the introduction of cocoa farming. With additional services, the project will also increase levels of vanilla curing at the farm level and support the adoption of Good Agricultural Practices (GAP). The joint project activities will improve the livelihoods of the vanilla farmers located in the district of Bemanevika. In return, the activities are playing an important role in Barry Callebaut's and Prova's efforts to extend the sourcing of sustainable vanilla and cocoa.

To accomplish this, Barry Callebaut will apply its long-standing cocoa expertise in association with Prova's local vanilla know-how, creating synergies on the ground for the benefit of the local vanilla farmers. Both Barry Callebaut and Prova will fund and support local communities through social, health and education programs.

IDH, the Sustainable Trade Initiative, will support Barry Callebaut's and Prova's project with professional consulting services as well as financing. The project will run over the next five years. First results regarding the newly introduced cocoa production are expected after three years.

Alessandra Ognibene-Lerouillois, Chief Sustainability Officer at Prova, on the novel project: "The cocoa and vanilla synergy is an ancient love-story that dates back to the

Aztecs, thousands of years ago. Witnessing this marriage in the field, helping farmers to improve their livelihoods is a big achievement. We are excited to embark on this journey with Barry Callebaut. Together, we will initiate the cultivation of cocoa! Our objective is to enable the planters to become stakeholders in their own development, take ownership of these projects and ensure their long-term sustainability. All our efforts are working towards this goal.”

Oliver von Hagen, Sustainability Manager Global Sourcing at Barry Callebaut, commented: “We are very happy to partner with Prova on this exceptional project. Vanilla is a key ingredient for us when making chocolate. This project will support farmers in being prepared for a less favorable future vanilla market. It also helps us as a company, securing a significant amount of our vanilla needs from a sustainable source. We are also very pleased that IDH fully supports our intentions and work on the ground. Altogether, this will complement and strengthen the efforts of the Sustainable Vanilla Initiative where we also are an active member.”

Jan Gilhuis, Senior Program Manager at IDH, added: “This is a unique and promising collaboration of experienced supply chain partners, bringing joint investments and technical knowledge on two distinct and valuable commodities together in the promotion of farm income diversification and sustainable farming.”

A major aim of the project is reducing the sole dependency on vanilla by introducing cocoa cultivation.

With about 80,000 vanilla producers, Madagascar is by far the most important producer of vanilla globally. Although vanilla is referred to as the world’s most popular taste and second most expensive spice in the world, it is also one of the most labor-intensive crops.

The vast majority of farmers are smallholders situated in the SAVA region. The rather precarious livelihood of vanilla planters is mainly due to their sole dependency on vanilla and the lack of financial support. Vanilla is harvested and sold from July to December, leading to an income gap of at least 5 months. Cocoa can be harvested throughout the year, helping vanilla farmers to diversify and stabilize their income situation while reducing the dependency on the extremely volatile vanilla market. Through the new project, the involved parties also aim to anticipate future phases with lower vanilla market prices and protect the economic situation of the local vanilla producers.

The joint project of Barry Callebaut and Prova aims at promoting crop diversification as a solution to income insecurity by training farmers in the cultivation of cocoa. So far, only a handful of farmers are cultivating cocoa in the SAVA region, but a recent feasibility study conducted by VDB has shown that the Sambava area was suitable for growing cocoa. Although Barry Callebaut does not own cocoa farms, the company has a vast knowledge and is a specialist in cocoa farming. Barry Callebaut will bring this long-standing cocoa expertise into the common project to reinforce farmers' knowledge on Good Agricultural Practices (GAP) and to grow cocoa not only efficiently but also sustainably.

Cocoa grown in Madagascar is certified as "Fine or Flavor Cocoa" by the International Cocoa organization, ICCO. It has particular flavor profiles, which makes it interesting for users of premium cocoa. The price for Madagascar cocoa is higher and more stable than the international cocoa prices.

Barry Callebaut uses a significant amount of vanilla extracts and flavors for its different chocolate factories worldwide. Prova has been a trusted vanilla supplier to Barry Callebaut for many years. Both companies are supporting the Sustainable Vanilla Initiative (SVI), a

platform bringing together all the stakeholders of the vanilla sector. Its mission is to promote sustainable production and sourcing in natural vanilla while improving the social and environmental conditions of smallholder farmers, through a combined effort.

Vanilla is a key ingredient when making chocolate – next to cocoa, sugar and milk powder. Vanilla is grown in Madagascar, Indonesia, Papua New Guinea, India or Uganda.

About Barry Callebaut Group:

With annual sales of about CHF 6.2 billion (EUR 5.6 billion / USD 6.6 billion) in fiscal year 2014/15, the Zurich-based Barry Callebaut Group is the world's leading manufacturer of high-quality chocolate and cocoa products – from sourcing and processing cocoa beans to producing the finest chocolates, including chocolate fillings, decorations and compounds. The Group runs more than 50 production facilities worldwide and employs a diverse and dedicated global workforce of more than 9,000 people. The Barry Callebaut Group serves the entire food industry, from industrial food manufacturers to artisanal and professional users of chocolate, such as chocolatiers, pastry chefs, bakers, hotels, restaurants or caterers. The two global brands catering to the specific needs of these Gourmet customers are Callebaut® and Cacao Barry®. The Barry Callebaut Group is committed to sustainable cocoa production to help ensure future supplies of cocoa and improve farmer livelihoods. It supports the Cocoa Horizons Foundation in its goal to shape a sustainable cocoa and chocolate future.

About PROVA (www.prova.fr/):

Worldwide leader in conceiving and manufacturing vanilla, cocoa, coffee and sweet brown extracts and flavours for the sweet food industry, PROVA is present in more than 60

countries across five continents. Thanks to the meticulous and respectful selection of raw materials and innovative extraction methods, the company always delivers high quality flavours specifically tailored to meet consumption trends and local taste preferences of each country. PROVA was created in 1946 and remains an independent family-owned business. Its headquarters are located in Montreuil, near Paris in France.

Source: Barry Callebaut / Prova

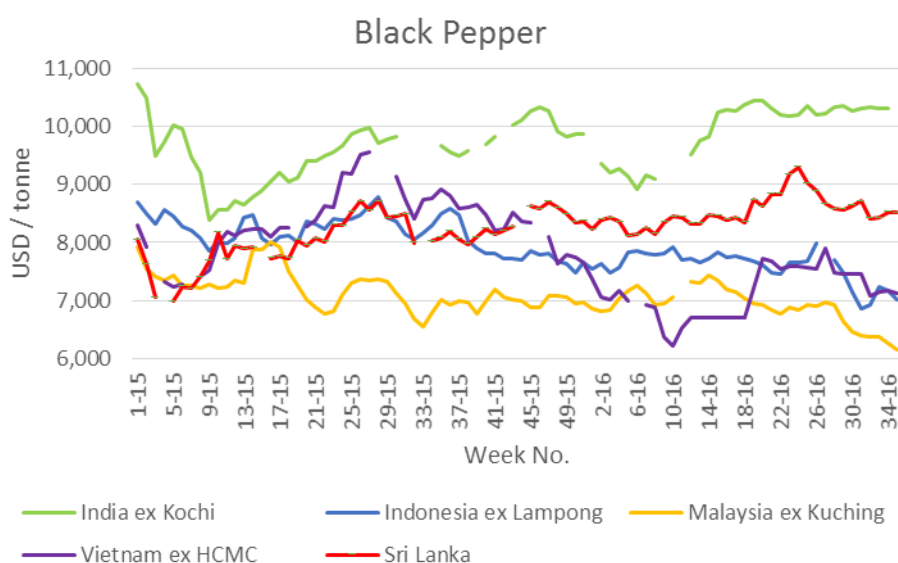
Market Dynamics

In general, prices in the market are reflecting good levels of supply that are able to meet demand for most products and most markets. With the exception of vanilla, there is no major volatility.

Pepper – Prices in the destination markets stable to weak.

The IPC have reported producer prices as follows:

(Indicative prices as received by growers. Based on information received from regional reporters)



Source: IPC Weekly Prices Bulletin data

Chilies – markets remain stable.

Cloves, coriander, cumin, pimento, turmeric – No significant movement in prices

Garlic – Prices are stabilising

Ginger – No change.

Vanilla – Prices still volatile, and set to rise further as the main crop comes to the market at the end of the year, and buyers try to get in early to secure the limited quantity of high quality vanilla.

Prices in the market place

Spices

All prices are quoted in US\$/Kg

MARKET →	USA				JAPAN				EUROPE			
PRODUCT	GRADE	PRICE			GRADE	PRICE			GRADE	PRICE		
		This Week	2 Month ago	1 Year Ago		This Week	2 Month ago	1 Year Ago		This Week	2 Month ago	1 Year Ago
Black Pepper	Spot 550g/l	8.60	11.50	11.50	Sarawak	8.90	9.50	10.80	Sarawak			
	Mal MG1				Mal MG-1	12.80	12.90	12.30	FAQ 550g/l	8.78	9.75	10.60
	FAQ 500g/l	8.35	10.50	10.69	Lampung				FAQ 500g/l	8.45	8.80	10.00
	Steam treated 550g/l				Brazil							
White Pepper	Muntok FAQ spot		13.75	15.65	Muntok	12.10	14.30	16.50	Muntok FAQ spot	12.40	13.50	14.80
	Vietnam	12.10			Sarawak	13.05	14.50	17.00	Steam treated Muntok spot			
Aniseed	Spanish	4.35							Vietnam Star			
	Turkish/Syrian		4.37	4.63					Syrian /Spanish	3.10	3.27	3.33
Caraway	Canadian		3.64	3.20					FAQ			
	Dutch	2.90							European	2.75	3.33	2.88
Cardamom	Bold	15.40	15.00	15.98	India AGS1				MYQ		4.72	5.20
	Seed	9.40	8.0	9.37	India AGS				Bold	12.00	10.16	

MARKET →	USA				JAPAN				EUROPE			
PRODUCT	GRADE	PRICE			GRADE	PRICE			GRADE	PRICE		
		This Week	2 Month ago	1 Year Ago		This Week	2 Month ago	1 Year Ago		This Week	2 Month ago	1 Year Ago
Cassia	Korintji B 3.00 ML/SVO	2.50	n/a	2.03	China whole	3.70	3.70	3.70	Korintji B Br & Cl	2.20	2.37	1.92
	Vera C/W AA	4.90	n/a	4.08	China broken	3.50	3.50	3.50	Vera AA	3.90	n/a	
	Vietnamese 5ML/SVO				Vietnam QNV	3.80	3.80	3.80				
Celery	Indian spot	2.15	2.34	2.03	Indian				Indian 99%	n/q	n/q	
Chili	Indian S4		3.86	3.04	Indian Sanna				S4 grade			
	Malawi	3.90	n/a	3.97	Chinese				African Bird's Eye	11.25	11.25	10.00
Cinnamon	Ceylon c5	14.55	n/a	12.02	Sri Lanka C5 SP				Sri Lanka c5 cut	n/q	n/q	
Cloves	Sri Lanka hand picked		19.29	19.29	Madagascar	9.00	10.00	10.50	Comores / Madagascar	9.15	9.32	9.83
	Comores/ Mada Indo stems	10.30	11.79	11.79	Zanzibar			13.00				
Coriander	Bulgarian	1.27	1.00	1.98					98% East European	0.85	0.94	1.30
	Canadian											
Cumin	Turkish		3.05	3.42					Iranian 99%			
	Syrian								Syrian 99%			3.10
	Indian	3.62			Indian				Indian 99%	3.15	3.05	
Dill	Indian	2.83	1.98	1.81					Indian 99%	n/q	n/q	
Fennel	Fancy Egyptian	2.60	2.54	2.54					Egyptian 99%			
	Indian ASTA	2.09	2.09	2.32	Indian				Indian 99%	1.83	1.83	
Fenugreek	Indian 99%	1.65	1.54	1.72					Indian 99%	0.95	0.94	1.41

MARKET →	USA				JAPAN				EUROPE			
PRODUCT	GRADE	PRICE			GRADE	PRICE			GRADE	PRICE		
		This Week	2 Month ago	1 Year Ago		This Week	2 Month ago	1 Year Ago		This Week	2 Month ago	1 Year Ago
Garlic	Ch. Powder	8.60	4.71	3.20					Flakes	9.50	4.50	n/a
	Ch. Granulated	10.40	5.64	3.62					Powder	7.00	4.38	2.66
Ginger	Cochin	5.25	n/a	5.73	Cochin				Granules	8.40	5.97	3.33
	Chinese sliced		3.40		Chinese sliced				Cochin	n/q	n/q	
	Chinese peeled	3.53	4.00	4.74	Chinese whole				Chinese sliced	2.90	3.27	4.80
	Nigerian	3.60	3.00	3.53					Chinese peeled	3.30	3.89	5.20
Mace	Papua broken	25.90	15.50	25.90	Siauw whole	19.50	19.50	18.00	Nigerian	2.75	2.80	3.03
									PNG Broken	14.00	n/a	n/a
Mustard	No 1 Yellow Canadian	1.70	1.80	1.74					W Indian	12.50	12.50	
	Brown oriental	1.50	1.60	1.54					Ukraine Yellow	0.76	0.78	0.79
Nutmeg	E.I. ABCDs	15.90	13.50	18.08	Indo 110's	17.00	17.00	15.50	Ukraine Brown	0.86	0.83	0.83
	E.I. SS	14.05	13.20						Indonesian SS	11.00	12.38	n/a
									WI 110's			10.00
Onion	Egypt pow								EI ABCDs	12.00	12.50	12.71
	India pow								Powder	1.62	1.70	2.46
Paprika	Spanish ASTA 120	3.55	4.37	4.63					Flakes	1.79	1.78	
	Spanish visual								Chinese 100ASTA	1.75	1.83	
	Hungarian	7.20	7.05	7.17					Spanish 80 ASTA	n/q	n/q	
	Peru ASTA	2.90	4.30	3.39					Hungarian ASTA 100	n/q	n/q	
								Peru HT90 ASTA	n/q	n/q		

MARKET →	USA				JAPAN				EUROPE			
PRODUCT	GRADE	PRICE			GRADE	PRICE			GRADE	PRICE		
		This Week	2 Month ago	1 Year Ago		This Week	2 Month ago	1 Year Ago		This Week	2 Month ago	1 Year Ago
Pimento	Mex/Guatemala	4.65	4.00	4.63	Mexican	4.50	5.00	5.25	Mexico	3.30	3.00	3.90
	Jamaica	12.90	10.00	12.89	Jamaica				Jamaica	8.50	8.80	n/a
Poppy	Turkish	1.85	2.90	2.54					Dutch	1.85	2.16	2.25
Sesame	Indian Natural	1.60	1.60						Indian natural	1.60	1.50	
	Indian hulled	1.90	1.80	2.32					Indian Hulled	1.70	1.67	2.01
Turmeric	Alleppey curcumin 5%	3.40	n/a	3.31	Madras fingers	2.80	2.80	2.20	Madras fingers	n/q	n/q	
	Powder	2.00	2.00		Alleppey fingers				Powder	1.78	2.00	1.70
Vanilla ¹	Bourbon	450-500?	200-360	70-100					Extract/ Gourmet	450-500?	200-360	70-100

¹ Vanilla – the prices given here are indicative of the value of bulk sales at origin. Selling prices within Europe are substantially higher as they reflect much smaller quantities that may be specially packaged.

Prices in the market place

Herbs

All prices are quoted in US \$/Kg

PRODUCT	USA				EUROPE			
	GRADE	PRICE			GRADE	PRICE		
		This Week	2 Month Ago	1Year Ago		This Week	2 Month Ago	1Year Ago
Basil	Egyptian FAQ	2.55	2.70	2.65	Egypt	3.50	3.27	3.33
	Egyptian Extra Fancy				Egypt fines			
Bay leaves	Turkish Fancy/HPS		7.50		FAQ	5.75	6.83	5.42
	Turkish semi select	4.30	4.00	3.73	HPS	11.50	10.66	11.13
				Turkish semi-select				
Chervil			8.50		German	9.30	8.38	8.42
Dill weed	Egyptian Californian	4.05	4.96	4.08	German	9.40	8.71	8.20
Marjoram	Egypt Fancy	2.75	3.55	3.53	Egypt	3.95	3.66	4.24
Mint	Spearmint	5.00	4.30	4.12	Egyptian	4.05	3.66	3.95
Oregano	Turkish30# FAQ	4.85 2.65	4.30	3.31	Turkish	4.86	3.94	4.01
Parsley	Israeli	6.70	5.50	7.00	European 2mm	5.90	5.49	5.60
	USA	8.16	n/a	8.16				
Rosemary	Morocco Spanish	2.10	2.30	2.09	Morocco Spanish	2.55	2.16	2.32
Saffron	Spanish			2,315	Iranian	3,250	3,250	2,500
Sage	Albanian	4.08	4.10	4.08	Turkish	6.36	5.88	5.25
Savoury	Albanian	4.17	3.28	3.30	German	4.32	4.00	4.29
Tarragon	Spanish	24.15	31.86	4.08	French	21.45	19.70	20.06
Thyme	Spanish	3.65	4.00	4.08	Spanish			3.22
	Moroccan				Moroccan	3.45	3.16	

Statistical information and related resources

The recent history of the vanilla market prior to the start (2014/2015) of the current turmoil is outlined below to provide some background to the current turmoil in the markets.

Export of vanilla from the production origins is primarily of the dried spice, and this is the main product used in the retail and food service sectors, although the US markets mainly use vanilla extracts. Use of vanilla in the food processing industry is dominated by use of the extract, but the supply of extracts to the major food industry users is dominated by the major western flavour companies. Extracts of vanilla are made at origin, but these operations are mostly small scale, producing simple (artisanal) extracts for niche markets, although the major Indian extraction companies (Synthite, Plant Lipids etc) have now started producing vanilla oleoresins (concentrated extracts). Small volumes of ground vanilla are also supplied from origin – allowing value to be added to low quality beans.

Export supply

A summary of exports from the major origins to the major markets for the period 1997 to 2013 (alternate years only) is given below¹.

Vanilla exports from major origins to major markets, 1997-2013, tonnes

	1997	1999	2001	2003	2005	2007	2009	2011	2013
Comoros	178	179	202	104	71	77	83	62	77
Madagascar	1,553	1,446	1,412	1,138	2,028	3,084	2,052	2,117	2,704
Indonesia	650	356	469	400	145	323	309	267	269
India	0	0	0	34	51	233	267	126	160
PNG	0	2	12	128	122	223	115	86	32
Uganda	20	40	75	122	172	421	333	196	82
Others	25	47	36	33	8	16	18	48	26

¹ Data is taken from multiple sources, and is likely to include some element of double counting – in particular over-stating export totals for Madagascar.

TOTAL	2,426	2,070	2,206	1,959	2,597	4,377	3,177	2,902	3,350
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Source: USDA FAS; Eurostats; Comtrade TradeMap; Madagascar Customs

Madagascar is the dominant production origin of vanilla, currently supplying in the range 70-80% of global supply. Production levels in Madagascar are broadly stable or increasing, having risen sharply since the end of the 1990's. The other principal production origins are Indonesia, India, Uganda, Comoros, and Papua New Guinea (PNG)². However, none of these origins supplies more than 300 tonnes, most supply less than 100 tonnes, and production levels are in decline. The import totals for recent years shown in the Table overstate consumption levels in the markets. In addition to the double-counting already noted, the trade used the period of very low prices after the ending of the price bubble of 2002/2004 to transfer stocks from origin to the markets to provide a buffer against the creation of any price bubbles in the future³. After the sharp decline in demand and consumption of vanilla in 2004 due to excessive prices, global consumption has been increasing in response to low prices, and is currently estimated in the range 3,000 tonnes.

Production levels at origin have changed very significantly over the past 15 years due to a range of factors: liberalization of the trade after 1996/97 enabling Madagascar to compete directly with Indonesia; high prices of the 2000/2004 period encouraging new origins to take up production and setting in motion new plantings and increasing production in many others; declining production in non-traditional origins in the face of continuing low prices over recent years (2005-2011) as a result of Madagascar's continuing high production levels. Key changes have been:

² A range of minor origins also supply small volumes, up to 20 tonnes, to the market – French Polynesia, Tonga, Tanzania, Mexico.

³ Occasionally, cyclones pass through the main vanilla production areas of NE Madagascar, and badly damage the vanilla crop, resulting in small crops. Over the period 2000/2004 two cyclones passed through this area. The reduced crops, coupled with extensive speculative activity in Madagascar, drove prices up to around US\$450/kg – at which price demand was cut off as users reformulated to use synthetic flavourings, and prices crashed to under \$20/kg.

- Madagascan production and export volumes have risen sharply;
- Production in Comoros has declined from around 200 tonnes into the range 60-80 tonnes;
- Indonesian production has declined from 600 to 700 tonnes to under 300 tonnes;
- Production in India, Uganda and PNG rose as high prices over the period 2002-2004 stimulating planting, with export levels rising to over 200 tonnes in India and PNG and over 400 tonnes in Uganda, but then fell in response to continuing low prices, with only India maintaining production above 100 tonnes.

Market prices for vanilla have risen strongly over the past 2 years. If prices are maintained at current levels, the decline in production should be reversed in most origins.

The major markets for vanilla are the US and Europe (primarily France and Germany), accounting for over 85% of global demand. Canada and Japan are the next most important markets, each importing in the range 100 to 150 tonnes/yr. All other markets are minor by comparison, and many will take supply from the major markets, rather than import direct from origin. The EU is the principal market for Comoros, accounting for around 70% of its vanilla exports. Exports to the USA are small and variable.

Imports into the US market by major origin, over the period 2008-2014 are shown in the Table below. The dominance of Madagascar is clear.

USA imports of vanilla, 2008-2014, by major origin, tonnes

	2008	2009	2010	2011	2012	2013	2014
Madagascar	1,290	1,154	1,283	1,115	1,677	1,455	1,437
Indonesia	240	202	207	205	172	219	126
Uganda	226	243	153	148	71	31	30
India	170	131	65	28	64	41	38
PNG	44	23	24	13	5	1	9
Comoros	12	14	8	2	0	22	11
Others	16	19	41	42	49	37	57
Total	1,998	1,786	1,781	1,553	2,038	1,806	1,708

Source: USDA FAS

From 2012, imports for ground vanilla were shown separately (HS coding 0905200), and this data is shown in the table below, together with unit import prices (US\$/kg). Import volumes are small but growing, and origins divide into 2 classes: the bulk low value suppliers (Madagascar, Indonesia and most recently Comoros in the range US\$30-45/kg); and origins supplying very small volumes into premium priced niches markets (Uganda⁴, India, in the range US\$80-90/kg). This Table needs to be seen in the context of current price levels that are now at least 5 times higher for this grade of product.

Table 8 US imports of ground vanilla, by origin, 2012-14, tonnes & US\$/kg

	2012		2013		2014	
	Tonnes	US\$/kg	Tonnes	US\$/kg	Tonnes	US\$/kg
Madagascar	43	17	45	27	53	46
Indonesia	5	18	13	22	6	28
Uganda	0		0		1	94
India	1	19	1	71	0	87
Comoros	0		0		1	35
TOTAL	48		59		61	

Source: USDA FAS

Total imports into the EU market, by major internal market, for the period 2008-2014 is shown in the Table below. Imports are dominated by France and Germany, with Belgium

⁴ The Ugandan material is almost certainly certified organic and FairTrade

also becoming an important market. The UK and the Netherlands make minor imports direct from origin (Netherlands primarily from Indonesia where it has strong trading ties).

EU imports of vanilla (whole & ground) from major origins, 2008-2014, tonnes

	2008	2009	2010	2011	2012	2013	2014
Total EU	1,410	1,389	1,684	1,486	1,844	2,129	1,903
<i>Of which:</i>							
France	880	862	1,037	956	940	1,041	816
Germany	402	436	552	343	414	543	511
UK	22	21	28	35	136	137	136
Belgium	80	49	26	42	139	198	302
Netherlands	23	19	36	103	196	179	114
Others	3	2	5	7	19	31	24

Source: Eurostats

Imports of ground vanilla are shown in the Table below. Totals are substantially higher than for the US. Import totals have increased sharply in 2014, with Belgium responsible for most of the increase (although most of the total came from the USA rather than from a production origin).

EU imports of ground vanilla, by major market, 2012-14, tonnes

	2012	2013	2014
Total EU	266	228	387
<i>Of which:</i>			
Belgium	71	90	191
Germany	64	72	74
France	81	24	97
UK	34	30	14

Source: EuroStats

Supply of vanilla to the EU from origin is dominated by Madagascar, as shown in the Table below.

Vanilla exports to the EU by major origin, 2008-2014, tonnes

	2008	2009	2010	2011	2012	2013	2014
Madagascar	852	1,028	1,196	1,185	1,178	1,516	1,132
Comoros	76	54	48	43	42	43	56
Indonesia	111	86	35	16	52	50	77
India	167	135	162	97	85	105	51
PNG	99	16	59	31	10	0	3
Uganda	99	53	165	35	49	42	22

Source: Eurostats

From 2012 EU import data for ground vanilla was shown separately and this data is shown in the Table below, together with unit import prices (€/kg). As with the US, suppliers divide into 2 price brackets: Madagascar and Uganda supplied at higher prices in the range €30-35/kg; Comoros and India in the range €10-20/kg. Increasingly large volumes of ground vanilla are also imported from the US, but the very low import prices indicate that this is not simple ground vanilla. Current (2016) prices are again around 5 times higher than the levels shown for 2014.

EU imports of ground vanilla, by major origin, 2012-2014, tonnes & €/kg

	2012		2013		2014	
	Tonnes	€/kg	Tonnes	€/kg	Tonnes	€/kg
Madagascar	121	20	51	28	67	32
Indonesia	3	21	0		0	
Uganda	5	19	9	26	3	34
India	47	12	50	12	58	9
Comoros	2	31	12	17	0.3	20
PNG	1	38	1	41	0	
USA	33	5	66	9	234	3
Other	54		39		25	
TOTAL	266		228		387	

Source: Eurostats

Events

Event	Start Date	End Date	Country	City	URL
SIAL	16/10/2016	20/10/2016	France	Paris	https://www.sialparis.com/
International Spice Conference	12/02/2017	14/02/2017	India	Kovalam	http://www.internationalspiceconference.com/
IFE	19/03/2017	22/03/2017	UK	London	http://www.ife.co.uk/
ASTA Annual Meeting	23/04/2017	26/04/2017	USA	Austin TX	http://www.astaspice.org/

