



## Herbs and Spices Sector in CARIFORUM

Background Brief for the  
3<sup>rd</sup> CARIFORUM-EU Business Forum

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## Executive Summary

As a result of internationalization, culinary traditions from other continents are being embraced by European consumers. The growing curiosity towards new tastes offers an opportunity for ethnic and exotic spices and herbs. Also, Europeans have busy lives and consumers spend less time on meal preparation, leading to an increasing demand for easy-to-prepare, semi-prepared and ready-cooked meals that rely on spices and herbs to retain and enhance food flavor (e.g. ready-to-use spices and herb or mixes thereof, seasonings and products that contain ready-to-use spice mixes as a supplement). There is also a growing niche for certified organic, Fair-Trade, and Rainforest Alliance spices and herbs. It should be remembered that buyers in the EU are increasingly showing preference for suppliers who treat and pay their workers fairly. Those who comply with fair trade practices and can prove that through a certificate will have better opportunities to do business with Europeans.

In 2013, the EU was the second largest market for seasonings, spices and herbs in the world, amounting to 520 thousand tonnes with a value of € 1.8 billion. The leading consuming EU markets are the UK, Germany, Romania and Hungary, together accounting for 58%. The EU market for herbs and spices has grown steadily over the years. In 2012, the EU imported 285,000 tonnes of herbs and spices worth almost Euro 900 million from developing countries.

CARIFORUM is a modest producer of spices. Efforts of note include Jamaica's production of pimento (and pimento oil) and vanilla, Dominica's production of bay leaf (and bay leaf oil), as well as Grenada's, and to a lesser extent, St. Vincent's production of nutmeg and mace. For the most part, spices and herbs produced in the region are consumed nationally. With the exception of nutmeg, mace and pimento, CARIFORUM exports of herbs and spices to the EU are low; but there has been significant successes in the export of sauces incorporating various herbs and spices. *Imports from the EU in this sector are also low, with sauces and seasonings (not mustard, ketchup, bitters or chutney) comprising the largest component.*

Notwithstanding the opportunities in the EU market the challenges in CARIFORUM are significant. The most pressing challenges in the herbs and spices sector are labour shortages, driven by low interest in farming, particularly by youths, coupled with ageing farmers. Also, labour costs in most of the region are relatively high compared to other spice-producing regions; this is compounded by the low levels of mechanization. There is also low productivity and poor farming infrastructure, inadequate access to finance for farmers and limited land for agricultural purposes. In spite of these, there are some success stories in the sauces/spices industry which suggest that the region can take greater advantage of market opportunities in Europe if the right interventions are made.

Since CARIFORUM will never be a big player in the herbs and spices market, there is need to distinguish and define its products with a particular brand appeal. In the consumer market in the EU, herbs and spices are now being related to particular foods or cuisine. It may be worthwhile for the Caribbean to promote and market its herbs and spices linked to particular dishes or recipes. This can be done in conjunction with the tourism product and authentic experiences in the region. Also, herbal tea is an increasingly profitable niche product and demand for herbal teas is increasing in the EU. This is a product niche to which more technical and other attention should be paid in CARIFORUM. Finally, how can the region increase intra-regional production and distribution of herbs and spices to lower the import bill in this sector?



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## 1. Introduction

Herbs and spices are a diverse industry. The United Kingdom's Seasoning and Spice Association (SSA) lists over 60 herbs and spices "frequently used" in Europe alone. In addition, there are many market segments in the industry, including: dried and fresh herbs and spices; essential oils; spice blends and seasonings (e.g. curry); dry and wet food products (e.g. dressings, marinades); medicinal products and cosmetic products, as well as others.

As a result of internationalization, culinary traditions from other continents are being embraced by European consumers. The growing curiosity towards new tastes offers an opportunity for ethnic and exotic spices and herbs. Furthermore, the ethnic minority groups in the EU are growing steadily as well -for example, in the UK (Indian, Pakistani and Bangladeshi), the Netherlands (Indonesian, Turkish, Moroccan), Germany (Turkish) and France (Algerian, other communities from French-speaking Africa). Also, EU consumers are looking for convenience. Europeans have busy lives and consumers spend less time on meal preparation, leading to an increasing demand for easy-to-prepare, semi-prepared and ready-cooked meals that rely on spices and herbs to retain and enhance food flavor (e.g. ready-to-use spices and herb or mixes thereof, seasonings and products that contain ready-to-use spice mixes as a supplement). The market for processed spices and herbs (e.g. crushed, ground, mixed) is harder for suppliers from developing countries to enter than that for whole products. However, with the growth of processing facilities in countries of origin opportunities for suppliers to add value in this way are also increasing.

This paper will provide a brief overview of the herbs and spices industry in CARIFORUM, as well as the primary related market segments, including hot peppers and hot pepper products and consider issues affecting greater market penetration in the European Union (EU).

## 2. The World Herbs and Spices Market: A Snapshot

Globalization, access to information, increased spending on food and shifting consumer trends towards health and authenticity has resulted in a growing herbs and spices market. According to a report published by Transparency Market Research, the global seasoning and spices market was valued at US \$12 billion in 2012 and is expected to grow at a compound annual growth rate of 4.8% to reach an estimated value of US \$16.6 billion in 2019.

### ***Production***

India is the world's largest spice producer. In 2013, India produced 1.5 million tons of spice, according to the Statistics Division of the Food and Agriculture Organization of the United Nations (FAO)<sup>1</sup>. The top spice export from India in terms of quantity is chili (312,500 tonnes); however, the top export in terms of value is mint and mint products (menthol, menthol crystals and mint oils - 24,500 tonnes).

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<sup>1</sup> FAO's [definition of spice](#) includes 10 categories.

The next largest producer is Bangladesh, which in 2013, produced 155,000 tons – almost 1,000% less than India. Other top producers include Turkey, China and Pakistan. In 2013, Asia was responsible for 95% of the global spice production. Pepper (capsicum) is the world's most consumed spice.

### **Consumption**

Asian-Pacific and European consumers are the largest consumers of spice. It is expected that their dominance will continue. The American consumer, conversely, has developed a taste for 'hot and spicy', driving increased consumption of hot peppers and hot sauces instead. In 2013, the EU was the second largest market for seasonings, spices and herbs in the world, amounting to 520 thousand tonnes with a value of € 1.8 billion.

The leading consuming EU markets are the UK, Germany, Romania and Hungary, together accounting for 58%. The EU market for herbs and spices has grown steadily over the years. In 2012, the EU imported 285,000 tonnes of herbs and spices worth almost Euro 900 million from developing countries. Between 2009 and 2013 the volume of imports grew by an average of 4.1% per year.

The spices and herbs in demand in the EU market are: pepper, parsley, paprika, marjoram, capsicum (chillies and cayenne pepper) oregano, pimento (allspice), thyme, coriander, bay leaves, cinnamon, rosemary, ginger, basil, nutmeg, mint, caraway, savoury, turmeric, dill, cumin, tarragon, cloves, sage, mace, cardamom, anise or badian seeds, fenugreek, saffron, vanilla, fennel seeds and juniper berries.

Two firms dominate the global herb and spice market: McCormick & Co. Inc. and Tone Brothers Inc., a subsidiary of Associated British Foods. These multinational firms are able to source a wide range of herbs and spices from across the globe. They have, however, been recently losing market share to smaller niche brands and to competitors like Walmart, which offer cheaper store brands.

The meat and poultry industry consumes the largest quantity of herbs and spices, as they make an effective and healthy natural preservative. Spices, for example, are used in the production of hotdogs, sausages, bologna and luncheon meat.

Traditionally, the spices and herbs trade channels in the EU consisted of importers, brokers, agents, grinders, blenders and processors, with different, specific functions. Nowadays, many of them have become multifunctional and their roles overlap. The distinctions between the different channels have blurred in recent years because of structural changes in the trade and a decline in the number of brokers and traders in Western Europe as a whole. One company often uses different distribution channels at the same time. Also, many processors and blenders do not use an importer or broker anymore, but import the spices or herbs themselves.

## 2.1 Caribbean Context

### *Production*

CARIFORUM is a modest producer of spice. Efforts of note include Jamaica's production of pimento (and pimento oil) and vanilla, Dominica's production of bay leaf (and bay leaf oil), as well as Grenada's, and to a lesser extent, St. Vincent's production of nutmeg and mace. For the most part, spices and herbs produced in the region are consumed nationally. Herbs are grown according to national tastes (i.e. thyme in Barbados, "chardon beni" in Trinidad, Scotch Bonnet pepper in Jamaica) and to meet the demands of the tourism industry (hotels and restaurants).

In terms of the 'fresh' market, small quantities of **Jamaican's Scotch Bonnet pepper** are exported to diaspora markets in the UK and North America; however, the most recent data indicate that over 98% of peppers produced in Jamaica are consumed in the local fresh and agro-processing markets.<sup>2</sup>

Between the 1930's and the 1960's, Jamaica was the 3<sup>rd</sup> largest exporter of ginger in the world, however, bacterial rot disease and the difficulty and cost associated with the peeling and drying of ginger has since reduced production to about 800 acres (320 hectares). In 2014 the ginger crop in Jamaica was expected to be about 3,000 metric tonnes.<sup>3</sup>

The region's best example of herb and spice production is Grenada's efforts with **nutmeg and mace**. Grenada is the second-largest producer of nutmeg and mace in the world, after Indonesia. Grenada is also the world's only producer of prime quality mace. The high quality of Grenadian nutmeg and mace affords it a competitive advantage on the international market. Agriculture contributes 7% to Grenada's GDP and of that 7%, 63% was the export of nutmeg and mace, accounting for over USD \$6 million in 2013. Before hurricane Ivan, the figure was twice as high but many trees suffered damage from the hurricane. Nutmeg prices have also recently fallen dramatically. According to the Grenada Cooperative Nutmeg Association, the price of nutmeg in 2014 dropped from US \$25,00 per metric tonne to US\$12,700<sup>4</sup>.

The country's major market for nutmeg is the Netherlands, where the nutmeg is processed and shipped to other EU countries. Nutmeg in the EU is primarily used in meat preservation and sausage making. In 2014, Grenada held its first annual Nutmeg Festival which incorporated nutmeg cuisine, tours, a bartenders' competition and a 'wellness day' linking nutmeg back to the health and wellness sector, amongst other activities. The Grenada Minor Spices Co-operative Marketing Society notes that, with the exception of small quantities of cinnamon to Barbados, no other 'minor spices' are presently being exported from Grenada.

<sup>2</sup> Jamaica Ministry of Agriculture and Fisheries. [Hot Pepper: a Spicy Condiment](#). June, 2010.

<sup>3</sup> [www.jamaicaobserver.com/pfversion/Jamaica-could-meet-global-demand-for-its-ginger-by-2019\\_17767173](http://www.jamaicaobserver.com/pfversion/Jamaica-could-meet-global-demand-for-its-ginger-by-2019_17767173)

<sup>4</sup> Now Grenada. [Nutmeg Price Drops](#). October, 2014.

Another example of note is Dominica and the production of **bay leaf** and **bay leaf oil**. According to the Co-operative Development Division of the Government of Dominica, Dominica is the top producer of bay leaf oil in the world.<sup>5</sup> (However, this claim could not be verified).

The Dominica Essential Oils and Spices Co-operative noted that there has been a significant decline in bay leaf oil production in the past two years as a result of a fungal disease known as “rust” which causes the leaves to turn brown and dry. Sufficient actions (i.e. spraying) were not being undertaken to mitigate the challenge because of the high costs of the fungicide.

While it is not known for spices, Haiti is ranked 27<sup>th</sup> on the list of countries that export essential oils. Haiti is the world leader in the vetiver oil industry and accounted for more than 60% of world exports of vetiver oil and 83% of CARICOM exports of essential oils in 2007. According to data from the World Trade Organization, in 2012 Haiti exported US\$11.9 million in essential oils, of which US\$5.2 million went to France and US\$ 3 million to Switzerland.

**Table 1: Production of Spices in CARIFORUM - 2013**

Country	Tonnes
Dominica	44
Dominican Republic	499
Grenada	73
Jamaica	1,521
Saint Lucia	121
St. Vincent & the Grenadines	160

Source: FAO Statistics

The Jamaica Ministry of Agriculture states that the **Jamaican pimento**, better known as allspice, is of the “highest quality, in terms of its oil content ...and market presentation”. The pimento industry, which includes the pimento berry, pimento leaf oil, pimento berry oil and other products earn Jamaica over US \$5 million annually. Pimentos are also used in the manufacturing of the well-known Jerk Seasoning, mixed spices and Pimento Liqueur. It is also believed to be one of the ‘secret ingredients’ in Kentucky Fried Chicken.

Food in the Dominican Republic is a vibrant mix of cultures. The rich and flavourful combinations of Spanish, Taíno and African cuisines create some delicious dishes. Sazón, or Sofrito as it is known throughout Latin America, forms the basis for a vast range of food recipes in the Dominican Republic. It is a sautéed mix of local herbs and spices that is used to bring out the flavours of dishes. However, most herbs and spices produced in the Dominican Republic are consumed locally and there are few exports.

With the exception of nutmeg, mace and pimento, CARIFORUM exports of herbs and spices to the EU are low. Imports from the EU in this sector are also low, with sauces and seasonings

<sup>5</sup> Government of the Commonwealth of Dominica, Co-operative Development Division. [History on the Essential Oils & Spices Co-operative Ltd. \(DEOCS\)](#).

(not mustard, ketchup, bitters or chutney) comprising the largest component. However, the region's global imports of hot pepper, paprika, pimento, saffron, turmeric, ginger, thyme exceeds 2,000 tonnes and US\$ 5 million per annum<sup>6</sup>.

### ***Processing***

Common products from herbs and spices in the region include: soaps, teas, wet and dry seasonings, sauces, oils and drinks – amongst others. The products that have found a niche position in the international market include: bitters, jerk seasoning (as well as other green seasoning in brine/vinegar) and hot (pepper) sauce. In 2009, CARICOM sauces and mixed condiments exporters generated US\$34.2 million in international sales<sup>7</sup>.

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<sup>6</sup> INTEAG Ltd. Herbal Market Research: International and Regional

<sup>7</sup> Private Sector Trade Note. CARICOM Sauces & Mixed Condiments Trade. February, 2011.



Table 2: CARIFORUM Exports to the EU - 2013 (Euros)

	Tea	Pepper (Pimenta / Capsicum)	Vanilla	Cinnamon	Cloves	Nutmeg, Mace, Cardamon	Seeds of anise, badian, fennel, coriander, cumin, caraway, juniper berries	Ginger, saffron, turmeric (curcuma), thyme, bay leaves, curry and other spices	Sauces, mixed condiments, mixed seasoning*
Antigua & Barbuda									1,109
Barbados									96,389
Belize									7,514
Dominica				11,025			771	11,340	18,898
Dominican Republic		453	1,160	6,586	2,742	997		34,706	115,384
Grenada						4,994,759		51	
Haiti					418			786	116
Jamaica	64,414	672,737	145,503	1,242				137,901	1,252,681
St. Kitts and Nevis									
Saint Lucia								1,504	146,064
St. Vincent & the Grenadines						50,655		2,594	1,329
Suriname								60,717	221,849
Trinidad & Tobago						2,291		951	47,506

\* excluding mustard, ketchup, soya sauce, mango chutney, aromatic bitters. (Source: EU Help Desk)

Table 3: CARIFORUM Imports from the EU - 2013 (Euros)

	Pepper (Pimenta / Capsicum)	Vanilla	Cinnamon	Cloves	Nutmeg, Mace, Cardamon	Seeds of anise, badian, fennel, coriander, cumin, caraway, juniper berries	Ginger, saffron, turmeric (curcuma), thyme, bay leaves, curry and other spices	Sauces, mixed condiments, mixed seasoning*
Antigua & Barbuda		52			740		965	46,139
Barbados	512					419	29,697	367,016
Belize							6,470	151,694
Dominica								
Dominican Republic	320,781	812	427	2,741	30,952	70,133	498,039	489,623
Grenada								14,547
Haiti					2,372	1,798	14,921	65,322
Jamaica	46,151	93	31	1,875		24		2,417
St. Kitts and Nevis								11,609
Saint Lucia	17,544					17,591	15,571	4,625
St. Vincent & the Grenadines							13	
Suriname			12,276				436,794	1,201,843
Trinidad & Tobago	91,504	33	51,103	35,334	16,675	193,072	122,205	62,317

\* excluding mustard, ketchup, soya sauce, mango chutney, aromatic bitters. (Source: EU Help Desk)

Internationally recognized brands include:

- Angostura Bitters (Trinidad & Tobago) – Angostura bitters, an aromatic bitters used in drinks and food, is distilled in Trinidad using the same original, secret recipe since 1824. Angostura Bitters is exported to 150 countries in the world. Trinidad exported over EUR \$2 million in bitters to the EU in 2013.
- Walkerswood (Jamaica) – Walkerswood was the first jerk seasoning to be exported from Jamaica. Their line now includes 16 products including hot sauces, curry pastes and marinades. Walkerswood has distributors in Canada, the United States, United Kingdom, Australia / New Zealand and the Caribbean.
- Grace /Matouk's / Baron's / Pickapeppa – There are many well-known brands of CARIFORUM pepper sauce presently being exported.

Recently, large firms have expanded into the ethnic food niche. McCormick and Tone Brothers, for example, are both producing Caribbean jerk seasoning and sauces shrinking the region's niche from "Caribbean sauces and seasonings" to "*authentic* Caribbean sauces and seasonings".

However, the Caribbean diaspora market does remain. Seamoss, mauby, aloe and ginger based drinks have also found a market. For instance, *Benjo's Sea Moss* drinks, produced in Dominica, are sold in the United States.

### 3. International Trends and Opportunities

#### 3.1 Trends in the food/cuisine industry

*Some like it hot:* According to Euromonitor, the world's appetite for hot sauces appears to be increasing. The US hot sauce market has grown 150% since 2000, influenced largely by growing immigrant populations and rising cuisine trends which include Mexican and Pan-Asian – both of which utilize hot sauces. Fast food chains like Chipotle (Mexican) and Nando's (Portuguese/Mozambican) have seen impressive growth rates over the past 5 years. Chipotle recorded an impressive 19% compound annual growth rate between 2008-2013. Hot sauces are expected to maintain their upwards growth trend of the next 5 years.

*Authentic, new experiences:* Consumers are developing more sophisticated tastes. They are looking for unique and authentic experiences. Accordingly, they are willing to experiment and try new flavours and products. Alongside this trend, is an enhanced interest in cooking – which means both an increase in the use of herbs and spices and an increase in the use of ethnic food products.

*Socially responsible:* There is a growing niche for certified organic, Fair-Trade, and Rainforest Alliance spices and herbs. It should be remembered that buyers in the EU are increasingly showing preference for suppliers who treat and pay their workers fairly. Those who comply with fair trade practices and can prove that through a certificate will have better opportunities to do business with Europeans.

*Healthy eating:* Diet seasonings and sauces (low salt, low sugar, low fat) are popular given the emphasis by consumers on health.

*Embrace of social media:* Seasoning and spice companies have started utilizing social media advertising campaigns on platforms such as Facebook, Pinterest and Twitter to establish their brand's identity and to encourage the use of herbs and spices, seasonings and sauces through the provision of recipes.

*Convenience:* Packing herbs and spices together for consumer convenience along with the relevant recipes is a growing trend in supermarkets.

### 3.2 Opportunities

- The Pimento market is growing. Continuing its expansion will provide opportunities. However, pimento is a tree crop which has a long gestation period before significant financial returns can be made. Pimento expansion requires a forward thinking strategy.
- Consider organic certification. The organic certified herb and spice market is still relatively small. Becoming certified can provide a competitive advantage in the EU and other markets.
- Premium seasoning blends or pepper sauces can assist a product in standing out amongst the many available options. Consumers are spending more on food. Caribbean mass market and economy brands no longer have the same competitive edge they once did given the increasingly growing range of products available.
- Raising awareness of products and promoting Caribbean cuisine on social media is critical. A website is not enough. Opportunities should be created by sharing recipes that incorporate one's product.
- While there are no major Caribbean food (restaurant) chains to date, opportunities to build brand awareness and loyalty can be developed by partnering with Caribbean restaurants in export markets.
- The regional food import bill can be lowered by producing more herbs and spices for regional consumption. Presently the import figure for just six herbs and spices (hot pepper, paprika, pimento, saffron, turmeric, ginger and thyme) exceeds US \$5 million per annum.
- The commercialization of 'bush medicine' could serve as a regional opportunity, through the grouping and packaging of fresh herbs to treat common ailments.
- Linkages might be explored between herbs and spices and cocoa. Chilli chocolate has grown in popularity. The Diamond Chocolate Factory in Grenada makes a nutmeg flavoured chocolate bar.

## 4. Standards and Market Expectations

### 4.1 EU Standards

The General Food Law is the legislative framework regulation applicable to all foods entering the EU. Regulations regarding contaminants in food, are also applicable to all foods and outlines the maximum levels for certain contaminants. Irradiation regulations are also applicable to spices and herbs, as is consumer labelling regulations for consumer packed herbs and spices.

While the EU has strict regulations for mycotoxin (aflatoxin and ochratoxin) levels, these standards must be adhered to and are being met by larger herb producing countries. Grenada nutmeg possesses a low mycotoxin risk<sup>8</sup>. Toxin testing is often a challenge for exporters for which technical assistance should be provided by relevant national authorities.

The [Quality Minima Document](#) of the European Spice Association provides an overview of the legal and non-legal requirements for herbs and spices. The [EU Helpdesk](#) also provides a full list of requirements.

## 5. Challenges and Recommendations for Change

### 5.1 Challenges

Similar to cocoa, the most pressing challenges in the herbs and spices sector expressed by producers were domestic in nature and primarily related to labour and production:

- Labour shortages: driven by low interest in farming, particularly in youth, coupled with ageing farmers;
- Labour costs: labour costs in most of the region are relatively high compared to other spice-producing regions, this is compounded by the low levels of mechanization utilized;
- Low production levels: largely labour related;
- Weak farming infrastructure: including poor access to irrigation and roads;
- Poor access to financing;
- Limited land available for agricultural purposes.

Other challenges identified were:

- Enhanced competition: from international brands in the 'Caribbean ethnic food' sector, from enhanced regional competition in the international marketplace and from other segments of the 'ethnic food' sector;
- Disorganization of the sector: The herbs and spice sector is wide and diverse and is not organized to lobby for its interests. The Caribbean Herbal Business Association is not a strong association.
- Food regulations in the EU relating to residues and additives, etc. sometimes are difficult to meet and affect prepared sauces and condiments.

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<sup>8</sup> Phillips, Denzil, Jaeger, Peter. Grenada Nutmeg Sector – Support in the Implementation of Market Expansion. 2012.

## 5.2 Concluding Observations

This section flags some issues for discussion and will be completed following the 3<sup>rd</sup> EU-CARIFORUM Business Forum in order to benefit from the discussions at the event. There is not much in the European policy environment that can be changed to help the Caribbean increase exports of herbs and spices. Indeed, many of the issues facing the industry in CARIFORUM are of a domestic or regional nature. Various technical assistance projects have been funded by the EU in this sector over the years. It is expected that this need will continue.

*Ethnic Foods Europe* which takes place annually in the Netherlands is a premier European trade event and a dedicated marketplace for the ethnic retail and foodservice industry, bringing businesses a wider choice of unique suppliers and inspiring new products from a worldwide market. It may be worthwhile for CARIFORUM to promote its herbs and spices products at this trade event, among others. In preparation for the 3<sup>rd</sup> CARIFORUM-EU Business Forum many herbs and spices companies in Belgium, Germany, the Netherlands and France were approached but most indicated a lack of interest in the Caribbean as a spice source. Indeed, a few companies indicated that the Caribbean had never been presented to them as a herbs and spices-exporting region before.

The following are some key issues to be considered regarding the promotion of the CARIFORUM herbs and spices sector in terms of increased trade and investment with Europe:

1. Where specifically does the Caribbean's competitive advantage lie with respect to the herbs and spices sector? The success of hot sauces in metropolitan markets in the US and UK is well noted but it is not clear if the relevant product innovations in herbs and spices can be achieved to appeal to customers in the wider EU market. Also supply side constraints remain a challenge for all Caribbean producers.
2. Since CARIFORUM will never be a big player in the market, there is need to distinguish and define its products with a particular brand appeal. In the consumer market in the EU herbs and spices are now being related to particular foods or cuisine. It may be worthwhile for the Caribbean to promote and market its herbs and spices linked to particular dishes or recipes. This can be done in conjunction with the tourism product and authentic experiences in the region.
3. Although herbal tea is not the first drink that comes to mind when we talk about the Caribbean, it is an increasingly profitable niche product and demand for herbal teas is increasing in the EU. This is a product niche to which more technical and other attention should be paid in CARIFORUM. There are several companies in the Caribbean and of Caribbean origin who are selling herbal teas in the region and abroad. Some use predominantly local raw materials while others are forced to import most of them due to high cost or lack of availability in the region. Like everywhere else in the world there is a major shift towards organic raw materials in the herbal tea sector. Indeed if the

materials existed nearly all herbal tea sold in Europe would switch to organic. There are two companies in the UK (Silverstone and Dalgety) who are trying to launch a Caribbean organic range. The question is whether adequate material can be sourced from CARIFORUM.

4. How can the region increase intra-regional production and distribution of herbs and spices to lower the import bill in this sector?
5. Would there be value in developing regional products to supply larger supermarket chains? Can this be achieved?
6. In light of a declining labour force, how can the Caribbean promote mechanization and the use of technology in order to increase productivity and attract a younger workforce?
7. How can Governments help to support the sector? Some countries have developed strategies for herbs and spices as part of their agricultural development plans but much needs to be done to implement them.

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