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Market Brief

2006

The Market of Cloves in European Union

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List of abbreviations

C	Centigrade
C&F	Cost and freight
CAD	Cash against documents
CBI	Centre for the Promotion of Imports from Developing Countries
CFC	Common Fund for Commodities
CIF	Cost, Insurance and Freight
CM	Centimetre
CNEX	Conseil National pour l'Exportation, Benin
D/P	Documents against payment
EU	European Union
FAO	Food and Agriculture Organisation
FAQ	Fair average quality
FOB	Free on board
GR	Gram
GAP	Good Agricultural Practices
GSP	Generalized System of Preferences
HACCP	Hazard Analysis and Critical Control Point
HS	Harmonized Commodity description and Coding System
ITC	International Trade Centre
KG	Kilogram
LBS	Pounds
LDCs	Least developed countries
M	Meter
MFN	Most Favoured Nation
MM	Millimetre
MT	Metric Ton
N.E.S.	Not elsewhere specified
SAPTA	South Asian Preferential Trade Agreement
SITC3	Standard International Trade Classification (Revision 3)

Executive Summary

Intended for producers and exporters, this market brief describes the market for cloves, more specifically the European Union market.

Two major producers, Indonesia and Madagascar, largely influence the market, which is currently stable according to interviewed traders. The world market is also influenced by several factors including aging trees in various producing countries, deforestation and the state of local processing and packaging facilities.

World production of cloves amounted to around 90,000 MT in 2004, a decline of around 30% as compared to 2003, which can be explained by the drop of the Indonesian production (around 50%), Indonesia being by far the largest world producer with more than half of the world production.

Singapore and India are the leading importers, Singapore being an “entrepôt” and re-exporting cloves to the East Asian region; India being a major consumer. The EU is the third world importer with Madagascar and the Comoros as major trade partners.

EU imports consist mainly of whole cloves, to a large extent used in whole form by the retail trade and in ground form by the food industry.

While in Europe cloves are used for food seasoning, in Indonesia they are used by the tobacco industry, ground and mixed with tobacco, to produce the famous “kretek” cigarettes.

Although the market is stable, interviewed traders believe that producers and exporters would largely benefit from actions such as planting new trees, improving the local processing and packaging facilities and stabilizing the price/quality ratio. Furthermore, they also believe that non-traditional markets with a high import potential, among which China, Viet Nam and North African countries, might offer interesting market opportunities.

A. Product description

Intended for producers and exporters, this market brief covers the European Union market for cloves whether or not crushed or ground, classified under the codes:

HS 0907 00 **SITC3 075.24**	Cloves (whole fruit, cloves and stems), dried, whether or not crushed or ground

Clove trees Sysygium Aromaticum (syn. *Eugenia caryophyllus*) belong to the Myrtaceae family. Evergreen, they grow in warm humid tropical regions with a minimum annual rainfall of 150 - 250 cm, up to an altitude of 800 - 900 m. They start bearing cloves (eugenia caryophyllata), which grow in thick clusters, twice a year after the seventh year. Native from the Moluccas in Indonesia, the clove trees are now found in other South Asian and South East Asian countries, in the Indian Ocean Islands and in Latin America.

Cloves contain 11% to 17% essential oil, which is mostly eugenol, an effective local anaesthetic. The percentage of oil depends on the freshness of the cloves: the fresher, the higher.

Various products and by-products of the clove tree can be commercialised:

- **The dried flower bud, commonly named clove, and the clove stems are the main commercial products**. Generally they are hand picked when the clusters are ripe, before the buds open. World cloves' main market is the tobacco industry, in Indonesia for the "kretek cigarettes", and in India. Their other market is as a spice, either in whole or ground form, in cooking and for flavouring.
- **Clove bud essential oil** is used in perfumery and, though less frequently, in pharmaceutical industries. The essential oil is also used by the food industry in meat products, sauces and pickles, confectionery and bakery products. The oil is a colourless or yellow liquid obtained in a yield of 11% to 17% on distillation of the spice. The quality is the best when the yield is included in a range of 15% - 17%.
- **Clove bud absolute** is mainly used in the luxury perfumery.
- Less expensive **clove stem oil**, pale yellow, obtained after distillation in a yield of about 6% is used in the mass-market products. It is also increasingly used in meat seasonings.
- **Clove leaf oil,** a dark brown liquid obtained after distillation of the dry leaves in a yield of 2% to 3%, is the major traded clove oil. When rectified, the oil is pale yellow. Less expensive than the bud or stem oil, it is used as a main source for the production of eugenol, which is used as an analgesic and as a raw material for other chemical products such as vanillin.
- **Clove oleoresin** is extracted from the stems or the buds. Its flavour and odour is similar to the spice, to which it is sometimes substituted. It is traded as an essential oil and is mainly used as seasoning in the meat industry, baked goods or desserts.

B. Production, foreign trade and consumption

Production

According to the FAO figures in table 1 below, Indonesia produced around 70% of world cloves in 2003, followed by Madagascar with around 12%. Tanzania and the Comoros followed with a share of 10% and 2.4% respectively.

Table 1.
Main producers of cloves, in MT

	2000	2001	2002	2003	Share 2003 (%)
World	**104,999**	**112,829**	**124,198**	**124,783**	**100.0**
Indonesia	74,047	80,684	87,909	90,000	72.1
Madagascar	15,600	15,500	15,500	15,500	12.4
Tanzania	10,000	10,500	12,500	12,500	10.0
Comoros	2,582	2,725	2,869	3,013	2.4
Sri Lanka	1,500	2,000	4,100	2,400	1.9

Source: FAO, FAOSTAT database.

Figures shown in table 2 below were obtained from interviewed traders who estimate that the world 2004 production was approximately 30% less than in 2003, amounting to around 90,000 MT. As far as Indonesia is concerned, its production dropped by 50% due to the low market prices. Important declines were also observed in Madagascar and Tanzania.

Table 2
Estimated production of cloves in 2004 in MT

World	**90,000**
Indonesia	45,000
India	10,000 – 15,000
Tanzania	6,000
Sri Lanka	4,500
Madagascar	3,000
Comoros	2,500
Brazil	1,000

Source: figures given by traders

Foreign Trade

Major world importers

As shown in table 3, the annual world trade of cloves averaged 50 thousands MT for an average value of US$ 150 million during the period 2000-2004. Singapore and India were the leading importers in 2004. Singapore's share was around 39% (US$ 53.6 million and 21,416 MT). India's was around 20% in value and 13% in quantity (US$ 27.4 million and 6,945 MT). During the same year the European Union's share was 6.6% in value and 5.1% in volume (US$ 9.3 million and 2,739 MT).

In Asia, Singapore plays the role of an "entrepôt" and re-exports the cloves mainly to the South East Asian region. In the past, around half of Singapore's imports came from Madagascar, 20% from Tanzania, 20% from Brazil and 10% from the Comoros, whereas now its main supplies come from Indonesia, Zanzibar and the Indian Ocean region.

While Singapore is a major re-exporter, India, is a major importer and consumer of cloves, mainly imported from Indonesia, Sri Lanka, Madagascar and Tanzania.

Table 3
Major world importers of cloves

Importers	Value (US$ 1000)						Quantity (MT)					
	2000	2001	2002	2003	2004	Share 2004	2000	2001	2002	2003	2004	Share 2004
World Total ***Of which:***	**146,624**	**208,132**	**143,737**	**115,916**	**139,314**	**100.0**	**51,764**	**54,573**	**35,647**	**58,031**	**54,072**	**100.0**
Singapore	48,989	104,090	38,133	34,133	53,599	38.5	14,933	19,101	6,880	17,177	21,416	39.6
India	6,356	34,944	24,849	29,548	27,434	19.7	2,754	5,437	6,867	15,678	6,945	12.8
Malaysia	3,216	2,511	4,569	2,017	8,169	5.9	913	409	869	880	2,581	4.8
Pakistan				3,859	3,179	2.3	-	-	-	1,702	1,269	2.3
USA	4,291	6,892	8,764	3,922	3,007	2.2	1,095	1,194	1,486	1,560	1,067	2.0
Japan	1,421	2,050	2,250	937	1,058	0.8	316	319	341	332	430	0.8
Total EU ***Of which:***	**10,884**	**15,827**	**18,850**	**9,228**	**9,260**	**6.6**	**3,069**	**3,938**	**3,574**	**3,155**	**2,739**	**5.1**
Netherlands	2,175	4,747	4,382	1,853	1,716	1.2	920	1,812	1,271	747	636	1.2
Germany	1,502	2,860	2,872	1,939	1,641	1.2	394	443	499	669	553	1.0
France	2,232	2,407	3,293	1,338	1,205	0.9	528	385	440	420	338	0.6
UK	1,449	1,697	1,479	824	879	0.6	432	682	352	282	292	0.5

Source: COMTRADE database, United Nations Statistics Division (UNSD).
Note: EU figures 2000-2004 include all EU 25 countries for comparison purposes.

Main origins of world imports

As shown in table 4, among the traditional producing countries, Madagascar is by far the major exporter although its exports dropped by more than half between 2000 and 2004, mainly due to the bad state of its trees and to the price volatility of the product. Its share in 2004 was around 26% in quantity and 25% in value.

As for Brazil, its exports increased sharply between 2000 and 2004 from 143 MT in 2000 to 6,427 MT in 2004 for a share of around 12% in quantity and 10% in value. The reason of this increase may be explained by the fact that the Brazilian cloves market is speculative due to its trade network's structure (see paragraph F. Distribution channels).

Tanzania, Sri Lanka, Indonesia and the Comoros are other significant exporters sharing respectively around 9%, 7%, 6% and 5,7% of the traded volume in 2004.

Table 4
World imports of cloves by main origins

Origins	Value (US$ 1000)						Quantity (MT)					
	2000	2001	2002	2003	2004	Share 2004	2000	2001	2002	2003	2004	Share 2004
Total world imports, of ***which from:***	**146,624**	**208,132**	**143,737**	**115,916**	**139,314**	**100.0**	**51,764**	**54,573**	**35,647**	**58,031**	**54,072**	**100.0**
Madagascar	97,333	97,298	29,139	41,244	35,205	25.3	32,257	27,427	7,164	20,601	14,029	25.9
Brazil	458	9,897	26,303	3,920	13,251	9.5	143	1,711	4,710	1,721	6,427	11.9
Tanzania	10,152	23,393	6,690	9,291	14,474	10.4	3,385	4,050	1,915	4,445	5,018	9.3
Sri Lanka	4,434	23,006	15,814	6,090	20,051	14.4	1,419	3,239	4,147	2,039	3,807	7.0
Indonesia	8,164	12,655	18,075	24,813	7,113	5.1	4,123	4,391	6,024	14,591	3,315	6.1
Comoros	5,751	12,349	9,813	4,445	8,545	6.1	1,794	1,925	1,652	2,196	3,080	5.7
Singapore	6,738	8,902	4,475	3,148	4,786	3.4	4,098	5,415	1,283	1,580	1,618	3.0
Netherlands	1,622	2,772	2,123	1,076	1,530	0.9	408	499	362	322	405	1.0
Kenya	510	2,311	1,891	240	1,351	1.0	163	443	279	75	437	0.8

Source: COMTRADE database, United Nations Statistics Division (UNSD).

Main origins of EU imports

The EU is the third world importer. Madagascar and the Comoros contributed to approximately half of the volume of its imports in 2004, followed by Indonesia (14%) and Brazil (13%).

Table 5
EU imports of cloves by main origins

Origins	Value (US$ 1000)						Quantity (MT)					
	2000	2001	2002	2003	2004	Share 2004	2000	2001	2002	2003	2004	Share 2004
Total EU imports ***of which:***	**10,884**	**15,827**	**18,850**	**9,228**	**9,260**	**100.0**	**3,069**	**3,938**	**3,574**	**3,155**	**2,739**	**100.0**
from extra EU:	**8,408**	**11,797**	**15,627**	**7,190**	**6,585**	**71.1**	**2,488**	**2,965**	**3,149**	**2,681**	**2,257**	**82.4**
Madagascar	3,811	5,481	3,308	3,249	2,061	22.3	971	912	533	1,333	697	25.5
Comoros	2,237	3,215	4,431	1,477	1,497	16.2	718	487	613	573	551	20.1
Indonesia	773	1,309	2,506	763	1,034	11.2	455	1,265	1,089	340	388	14.2
Brazil	56	508	3,252	806	1,193	12.9	12	74	507	184	368	13.4
Sri Lanka	1,100	615	1,391	552	253	2.7	239	129	186	167	102	3.7
India	131	98	125	160	229	2.5	25	15	16	24	41	1.5
Tanzania	146	178	136	46	89	1.0	35	24	19	14	30	1.1
from Intra EU:	**2,476**	**4,031**	**3,223**	**2,038**	**2,675**	**28.9**	**581**	**973**	**425**	**474**	**481**	**17.6**
Netherlands	1,199	2,066	1,500	654	1,008	10.9	284	339	224	166	247	9.0
Germany	380	431	592	272	355	3.8	89	61	83	80	84	3.1
Sweden	67	51	149	69	289	3.1	15	7	11	10	19	0.7
France	462	499	580	669	276	3.0	103	68	61	163	47	1.7

Source: COMTRADE database, United Nations Statistics Division (UNSD).
Note: EU figures 2000-2004 include all EU 25 countries for comparison purposes.

Consumption

South East Asia is by far the major world-consuming region where Indonesia is the major consuming country. Indonesian annual consumption of cloves ranges between 65,000 and 85,000 MT, it is mainly used to produce the kretek cigarettes, which consist of two thirds of tobacco and on third of cloves. The rest of the world consumes approximately 10,000 MT shared mainly by the EU, North and South America and China (between 1,000 – 1,500 MT each) and the Middle East (between 3,000 to 4,000 MT).

C. Market characteristics

Cloves are generally imported whole, grinding being done in consuming countries, for the cloves flavour quickly deteriorates when they are ground.

In the EU, the most popular quality is the CG3 quality from Madagascar, the Comoros and Zanzibar. CG3 quality accounted for 75% to 95% of the EU clove consumption during the last two years. The other qualities consumed in the EU are CG1 and CG2.

EU Importers specify that each lot should not contain not more than 20% of cloves without heads, 7% of foreign matters from the clove and 1% of foreign matters. Furthermore they admit a maximum of 13% of humidity before shipment.

In the EU, the ground stem is often used instead of the bud in spice blends, particularly in spice mixes and for curry powder. The food industry is the main user of ground cloves chiefly for meat seasonings, sauces and baked foods. As for retail sales, they are an important market segment and consist mainly of whole cloves, where the buds are complete, with large heads and stout stalks.

In Indonesia, cloves are ground and mixed with tobacco by the kretek cigarette industry. Zanzibar and Madagascar qualities were used in the Indonesian up-market cigarettes until two years ago when the imports were banned to protect the local production of cloves.

D. Market access

Tariffs

In the EU, a third country duty of 8% ad valorem is levied on cloves imports including imports from Brazil and Indonesia. The EU waives this third country duty for imports from countries with special trade agreements, including Madagascar and the Comoros. Tariff preferences ranging from 1.1% to 2.8% are granted to selected countries (see annex 4).

In Malaysia and Singapore, no import duty is levied on cloves imports.

In India, no import duty is levied on cloves imported from Sri Lanka, the major cloves supplier to India. A third country duty of 70% is levied on cloves imported from countries with special trade agreements, except SAPTA countries (7%), and South Asian Association for Regional Cooperation (Least developed countries) countries (20%).

Tariff details are available on ITC's Market Access Map http://www.macmap.org/

Regulations, sanitary and phytosanitary measures in the EU

Nutritional, hygienic and toxicological issues are major concerns to EU consumers. Subjects such as macro-cleanliness, microbial loads, heavy metal and pesticide residues are regulated by food safety standards.

The EU has a number of directives and regulations concerning food safety and the European Spice Association (see annex II, other useful addresses) has fixed minimum quality and sanitary standards agreed by all members. In addition, Individual member countries or buyers may impose additional requirements. Therefore, producers should check with the importers for their specific requirements and those of the target country.

For instance, irradiated foods are totally forbidden in the Netherlands while the EU Directive 1999/3/EC of the European parliament and the European Council of 22 February 1999 set at 10 the maximum overall average absorbed radiation dose (kGy) permitted in spices.

The website www.europa.eu.int/comm/index_en.htm contains additional information on subjects such as:

- Food Contact Materials.
- Food Contaminants and Residues (chemical and pharmaceutical).
- Food Hygiene.
- Food irradiation.
- Official controls on food products.

Exporters may also wish to refer to the Cleanliness Specifications of the American Spice Trade Association (ASTA), which are often considered as a reference by the trade, and consult the ASTA website: www.astaspice.org.

Standards

Information on standards imposed in the clove trade can be found in the International Organization for Standardization (ISO) website: www.iso.org, more specifically the following standards:

- ISO 2254: 2004 Cloves, whole and ground (powdered) -- Specification
- ISO 3141: 1997 Oil of clove leaves [Syzygium aromaticum (L.) Merr. et Perry, syn. Eugenia caryophyllus (Sprengel) Bullock et S. Harrison].
- ISO 3142: 1997 Oil of clove buds [Syzygium aromaticum (L.) Merr. et Perry, syn. Eugenia caryophyllus (Sprengel) Bullock et S. Harrison].
- ISO 3143: 1997 Oil of clove stems [Syzygium aromaticum (L.) Merr. et Perry, syn. Eugenia caryophyllus (Sprengel) Bullock et S. Harrison].

In addition, the following documents published by the FAO may be useful:

- Code of hygienic practice for spices and dried aromatic plants CAC/RCP 42 – 1995.
- Guide for the Microbiological Quality of Spices and Herbs Used in Processed Meat and Poultry Products CAC/GL 14 – 1991.

As mentioned previously, exporters may wish to refer to the European Spice Association minimum quality and sanitary standards. They may also wish to refer to the Cleanliness Specifications of the American Spice Trade Association (ASTA).

Organic standards. As with all other food products, consumers, mainly in the EU, are increasingly showing a preference for organic products for which they are willing to pay a higher price. Therefore the reader should refer to EU Regulation 2092/91 on the production, processing and commercialisation of organic products.

The following ITC studies contain useful information on organic certification and food laws and regulations:

- Organic food and beverages, world supply and major European markets, ITC, 1999.
- The United States market for organic food and beverages, ITC, 2002.

The Hazard Analysis and Critical Control Point system (HACCP) can be an asset. The EU Directive on Hygiene for Foodstuffs (93/43/EC) which became effective the 1st of July 1996 stipulates that: "foodstuffs companies shall identify each aspect of their activities which has a bearing on the safety of foodstuffs and ensure that suitable safety procedures are established, applied, maintained and revised on the basis of the HACCP system". The adoption of the HACCP system is mandatory for EU companies which process, treat, pack, transport, distribute or trade foodstuffs. It concerns risks such as macro biological (vermin), microbiological (viruses, bacteria, moulds) and toxicological (contamination by pesticides, heavy metals or dioxin). Although not mandatory for exporters to the EU, an approved HACCP system can be an asset.

E. Prices

According to traders, clove prices went up in the last six months from US$ 2,500 to US$ 3,800 FOB or ex-warehouse Singapore. They expect them to range between US$ 2,500 and US$ 3,300 in the first quarter of 2006.

At the end of November 2005, prices of average quality cloves were as follows in US$/MT FOB Singapore:

- Indonesia: 2,850
- Zanzibar: 2,900
- Comoros: 2,800
- Brazil: 2,750
- Madagascar: 2,800

Prices of stems in US$/MT C&F European ports were as follows:

- Madagascar: 600 – 950
- Indonesia: 500

Table 6 below contains indicative prices of cloves included in the ITC Market News Service (MNS) report of March 2006.

Table 6
Indicative prices in the market place in US$/kg

	USA	Japan	Europe	Kuwait
Sri Lanka Hand picked	7.17			6.0
Madagascar	3.65	4.80	4.50	
Comoros			4.50	
Zanzibar	4.74	5.40		
Indo stems	1.10			

Source: MNS report, March 2006

The Market News Service (MNS) of the ITC collects information from a network of correspondents worldwide in order to provide timely and detailed price and market information on various products including spices. MNS is available on ITC's Product Map market intelligence platform on: http://www.p-maps.org.

Prices and other useful information may also be found in the periodicals Marchés tropicaux et méditerranéens and The Public Ledger (see annex V).

F. Distribution channels

Rotterdam, London, Hamburg, Marseilles and Antwerp are the major international trading centres in Europe, while Singapore is the major trading centre in South East Asia and Dubai the major one in the Middle East.

Many exporters prefer to work with sales agents based in the importing country, who act on behalf of the exporter, find an importer, negotiate prices and contractual terms, present samples and have them tested, give the exporter market reports, etc. Sales agents, being based in the consuming country, have easier access to market information including up to date market prices. Before working with agents and engaging their services on a long-term contract, exporters should check the agents' trade references.

Cloves are often imported in bulk in the EU through German or Dutch traders, while in the United Kingdom traders import cloves chiefly for their domestic market. European traders can offer competitive prices due to the large quantities they deal with. Thanks to their infrastructure, they also offer very short delivery terms as compared to exporters in producing countries. They have a better knowledge of the local market and its requirements and they can guarantee regular supplies and quality. Annex I contains a list of potential EU importers/traders as well as trade contacts in Singapore.

Exporters may refer to the ITC's Product Map market intelligence platform on http://www.p-maps.org, which contains links to potential business contacts in addition to other useful information such as international trade statistics, prices or market studies. They may also refer to the website www.europages.com, which contains contact details and information on importers as well as what the site describes as a "market place short term offers".

Example of distribution networks in Madagascar and in Brazil:

- In Madagascar, small growers barter their cloves for various commodities offered by bush collectors who sell the cloves to large collectors. The collectors either deal with exporters or sell the cloves to regional capital cities.
- In Brazil, the market is volatile because the distribution networks are shorter. Production is in the hands of large growers who sell their crop directly to exporters but only if the price offered is high enough to cover their production costs.

In the EU, cloves are generally distributed through the following networks:

- Specialized traders/importers sell to grinders/processors. They also often process the spices before re-exporting them.
- Processors (grinders/blenders/packers) purchase raw spices directly from exporters or from traders/importers. Although more costly, the latter option is generally adopted, as supply and quality problems are better managed than purchasing directly from individual exporters. Processors sell mostly to the industrial users, to the retail, wholesale or catering sectors.
- The spice grinding and processing industry is highly concentrated in developed countries. However, there are a few joint ventures between multinationals and companies in producing countries, which make the supply and quality control easier.
- The **food-processing industry** is the largest client of the spice processors.

G. Commercial practices

Usually a standard "shipment contract" is used, issued by:

International General Produce Association
Gafta House
6 Chapel Place
Rivington Street
London. EC2A 3SH
United Kingdom
Tel: +44 20 7814 9666
Fax: +44 20 7814 8383
E-Mail: igpa@gafta.com
Web Site: www.igpa.com

Where buyers and sellers are well known to each other they may prefer to agree mutual terms rather than use a standard contract. However, it is worthwhile for sellers to compare their arrangements with the terms offered by other buyers.

Cloves are generally traded on a FOB, C&F or ex store basis, in US dollars per MT. The date of shipment, grade and price are to be clearly indicated in the contract. Payment is usually cash against documents (CAD). The letter of credit (L/C), both confirmed and irrevocable is not often used. When L/Cs are used, new suppliers are advised to offer advantageous terms such as payment after arrival and inspection, or drawing a certain percentage against the L/C, with the rest to be paid after inspection, to create good will. Usually importers require a pre-shipment quality control, which is carried out by an independent company.

Generally cloves are shipped in containers, by sea from overseas, and by truck or by rail within Europe.

Suppliers should be ready to make available a specification sheet including information on the following:

- Name of the product
- Definition
- Botanical name
- Source
- General properties (colour, aroma, taste, extraneous matter)
- Physical and chemical properties (moisture, volatile oil, total hash)
- Bacteriological properties
- Packaging

New suppliers are advised to make sure that the quality of the shipment and the delivery terms correspond to the contract.

H. Quality

The quality and yield of the crop depend largely on the skill of the pickers. Furthermore, the quality of the dried cloves depends on various factors that exporters should consider throughout the whole process, from harvesting of the clove clusters to shipment, in order to ensure the quality of their cloves:

- Harvesting should be done when the buds are fully developed and when the base of the calyx has turned from green to pink.
- Stems should be removed from the clove buds.
- Stems and buds should be piled separately for later drying.
- Over-ripe cloves should be excluded as well as residues of flowers.
- The drying process should start as soon as possible after the separation of the buds from the clusters.
- The cloves should be exposed to the sun for drying (normally four to five days, longer when the weather is cloudy), either on mats or on concrete floors. In the latter case the use of mats is advised to avoid abrasion of the cloves.
- During the drying process the buds should be spread out in a thin layer on the floor and raked from time to time to avoid mould and to obtain a uniform colour.
- After the drying process, the dried cloves should be sorted to remove “mother-of-cloves” (i.e. clove seeds) and “khoker cloves” (i.e. withered cloves).
- When necessary exporters should re-dry the cloves to comply with the importers' requirements as regards the moisture content.
- The dried weight should be one-third of the fresh green weight.
- After a final cleaning, sorting and grading, the cloves should be stored in jute bags in dry, ventilated rooms.
- The cloves should not be too much stacked up as stacking up deteriorates them.
- A prolonged storage should be avoided as it leads to a loss of some of the volatile oil by evaporation. This is particularly true when the spice is ground and is exposed to the air.

Some parameters allow processors to estimate the quality of the cloves when properly dried. These parameters refer to their appearance, size and oil content as well as to the aroma character of the cloves' volatile oil:

- Cloves should be of a bright brown colour, free from mould and they should snap cleanly.
- The cloves' heads should be light brown and closed.
- The aromatic steam volatile oil content should be around 17% in good quality cloves.
- The fixed-oil content should range between 5% and 10%.
- The foreign matters: dust, leaves, sticks, dead insects, residues should not exceed 1%.

An example of foreign matters and mould permitted in cloves is shown in table 7 below:

Table 7
Foreign matter and mould permitted in Zanzibar cloves

Quality	Maximum foreign matters	Maximum level of mould
Good cloves “Special quality”	2% of stems, mother of cloves, khoker and extraneous matter	14%
Khoker and mother of cloves “standard quality”	4% of stems, mother of cloves, and extraneous matter. 4% of khoker	14%
Stems	5% of stems 20% of khoker	14%

Source: Zanzibar State Trading Corporation

In addition, a floating test may be used to determine the quality: higher grade cloves sink or float vertically with their heads up while lower grade cloves float horizontally on the surface of the water.

When properly stored, cloves may be kept for approximately 24 months while ground cloves may be kept for about 6 months.

The stems used for oil distillation should be dried in a similar manner to the buds. As the buds, they loose two third of their fresh green weight during the drying process.

Often, traders set their own quality standards and control samples prior each shipment. They also carry out quality controls after reception of each shipment to ensure that it matches with the samples agreed upon.

Traded cloves and clove oils are generally classified according to their country of origin as shown in table 8 below:

Table 8
Cloves and clove products classified according to origins

Clove buds or stems	Clove bud oil	Clove stem oil	Clove leaf oil
Brazilian	Malgasy	Malgasy	Indonesian
Comoran	Sri Lankan	Zanzibar Tanzanian)	Malgasy
Grenadian	Indonesia	Indonesia	
Malgasy	Zanzibar		
Penang (Malaysian)			
Sri Lankan			
Zanzibar (Tanzanian)			

Other origins include India, the Philippines, the Seychelles, Mauritius and Singapore.

Most traded cloves pertain to the **"average quality"** which includes the origins and qualities listed in table 9 below:

Table 9
Traded qualities according to origins

Origins	Average quality	Top quality
Madagascar	CG3	CG1
Comoros	CG3	
Zanzibar	Standard	Handpicked
Brazil	FAQ	
Indonesia	Various qualities	

I. Packaging and labelling

Clove buds and stems are generally packed for export in 50 kg maximum double jute or polyethylene bags. The bags are shipped in containers of a capacity of 10 tonnes - 20 feet or 20 tonnes - 40 feet.

The **essential oil of clove** is generally shipped in plastic drums, the **clove leaf oil** is packed in metal drums and the **Oleoresin**, mainly of Indian origin, is packed in 20 or 25 plastic pails.

Containers used for shipment should preferably be ventilated and the temperature during shipment should range between 5° C and 25° C. In addition, the relative humidity should not exceed 75% as too much humidity increases the risk of self-heating of the cloves due to their high content of fatty oils. Furthermore, once damp the cloves get worthless.

In the EU, Environmental regulations regarding packaging are of high importance. The EU Directive 94/62/EC of 20 December 1994 on Packaging and packaging waste, which became law in 1996 commits all EU members to adopt policies to restrain the production of packaging wastes and facilitate their recovery, recycling and reuse. For spice exporters, it lays down the permitted maximum levels of heavy metals such as lead, chromium and mercury in packaging materials. Additional and detailed information may be found in the ITC publication: "Dried Herbs and Spices – A packaging manual", 1999. This publication contains information on the following subjects:

- Transport packaging
- Retail packaging
- Packaging materials
- Packaging methods
- Health, safety and environmental issues affecting spice packaging.

Other ITC publications contain information, which might be useful:

- PACKit: Importing Country Profile, EU, 2005.
- PACKit: Packaging product module, Spices and herbs, 2005.
- PACKit: Cross-cutting module, Transport Packaging, 2004.
- PACKit: Cross-cutting module, Health, safety and the environment in the context of packaging, 2004.
- Glossary of packaging terms for developing countries, 1997.

Information on labelling, presentation and advertising of foodstuffs to the final consumer may be found in Council Directive 2000/13/EC of 10 March 2000.

Exporters are advised to write labels in at least two EU official languages, generally English and French, including:

- Name of the product
- Country of origin
- Care conditions
- Name and address of the manufacturer or distributor
- Crop year
- Lot identification / batch number
- Net weight
- Special storage requirements
- Instruction for use

As regulations are constantly revised, exporters are advised to always check with their importers for the latest requirements.

J. Trade promotion

Exporters of cloves promote their products mainly in cooperation with importers and supermarkets through the distribution of promotional pamphlets with product description and culinary suggestions and recipes. They also often place advertisements in specialized publications (see annex V) or through the web. Participation in trade fairs is also a good way to develop new contacts and obtain information on market trend and commercial practices.

Export promotion organizations can also send delegations to importing countries to strengthen existing business ties and explore new ones. An especially effective way of doing this is to participate in selected food fairs. A list of the most important fairs for the EU market follows:

Food Ingredients (FI)
Trade fair, which takes place in various locations
Next event: 13 - 15 September 2006, Bangkok, Thailand
Contact office: Expoconsult BV trading as CMP Information
PO Box 200
3600 AE Maarssen
The Netherlands
Tel: +31 346 559 444
Fax: +31 346 573 811
E-mail: fi@cmpinformation.com
www.fi-events.com

Anuga
Biennial trade fair
Next event: 13 to 17 October, 2007 Cologne, Germany
Organizer: Koelnmesse GmbH
Messeplatz 1
50679 Köln
Germany
Tel: +49 221 821-3895
Fax: +49 221 821-3410
E-mail: anuga@koelnmesse.de
www.kolnmesse.de

IFEAT conference
Next event: 27 Nov.- 1 Dec. 2006, Cape Town, South Africa
organizer: International Federation of the Essential Oil and Aroma Trades (IFEAT)
GATFA House
6 Chapel Place
Rivington Street
London EC2A 3SH
United Kingdom
Tel: +44 20 7729 5904
Fax: +44 20 7814 8383
E-mail: secretariat@ifeat.org
http://www.ifeat.org

SIAL Salon international de l'alimentation
Show which takes place in various locations:
22-26 October 2006 Paris, France
28 au 30 Mars 2007 Montréal, Canada
Contact: SIAL Service Client
1, rue du Parc, 92593 Levallois Perret, France
Tel: +33 1 49 68 51 00, Fax: +33 1 49 68 54 49
E-mail: infos@exposium.fr
http://www.exposium.com/fr/contenu/contact/form_contact.htm
www.sial.fr

K. Market prospects

Interviewed traders believe that the overall world market for cloves is currently stable and largely influenced by the situation in Indonesia and in Madagascar.

In Indonesia, two major facts contributed to the stagnation of the market:

- Two years ago, the Indonesian government imposed a ban on imports, which largely contributed to the decline of Madagascar exports and led to higher local prices.
- Taxes on kreteks increased significantly resulting in a drop of consumption of 30% in five years.

In Madagascar, the clove trade needs to be relaunched and several measures should be taken to achieve that:

- Plantations should be developed and new trees should be planted in order to regain the country's competitiveness. Indeed, Madagascar clove trees are often old and scattered in the country.
- Prices should be stabilized to reach a good price/quality ratio.
- Reliable quality control offices should be able to operate in such a way that the exported products meet the requirements of consuming countries. At the same time, producers and exporters should try to improve the quality of their products and related services.

Export efforts should turn to non-traditional markets. Traders believe that producing countries should promote the consumption of cloves in non-traditional markets, among which China seems to have the highest import potential, as well as Viet Nam and North African countries. In addition, the Russian spices and condiments market is also reported to be growing rapidly due to the rising personal income and thus the growth of spending on food, especially in Moscow.

Incentive price and crop diversification: the Tanzanian example. To motivate clove producers, the Tanzanian government recently increased the prices paid to producers. Besides incentive price, the government is promoting crop diversification in order to be less dependent on market conditions. Crop diversification mainly concerns the production of copra, vanilla and cardamom in the Zanzibar archipelago. In addition to these new crops, algae production is being developed, mainly for export to Japan.

On medium to long term, in all producing countries, the key to export performance seems to lie in various factors including the enhancement of the clove trees, the improvement of local processing and packaging facilities in order to add value to the products, and the stabilization of the price/quality ratio. Besides, producing countries may consider crop diversification as a way to increase their export revenues and to be less dependent on the clove market conditions.

Annex 1: Selected Potential Importers

France

AGIPAL S.A
12 rue de Puebla
Cp 78600
Maisons Laffitte
Tél : +33 (0) 1 39 62 32 77
Fax : +33 (0) 1 39 62 04 86
agipal@wanadoo.fr

ALBERT VIEILLE
629 route de Grasse - B.P.217
06227 VALLAURIS CEDEX
Tél: +33 (0) 4 93 64 16 72
Fax: +33 (0) 4 93 64 80 07
Albert.Vieille@wanadoo.fr

AVO - LES EPICES D'INGWILLER
1, rue de la Brasserie
67340 INGWILLER
Tél : +33 (0) 3 88 89 45 47
Fax : +33 (0) 3 88 89 55 41
www.epices-avo.com

BAROSYL
1 rue Pacho
06300 NICE
Tél: +33 (0) 4 97 08 23 30
Fax: +33 (0) 4 97 08 23 39
barosyl@frmail.net

BOURGAREL S.A.
8 rue Aldebert
13006 MARSEILLE
Tél: +33 (0) 4 91 13 70 10
Fax : +33 (0) 4 91 53 27 72
Bourgarel.sa-thierry.bourgarel@wanadoo.fr

E. CAVASSE
BP 5
06580 PEGOMAS
Tél : +33 (0) 4 93 40 54 80
Fax :+33 (0) 4 93 40 91 40

CEPASCO
Parc d'Activités de Géménos
25 avenue de Coulin – BP 125
13881 GEMENOS CEDEX
Tél : +33 (0) 4 42 32 23 23
Fax : +33 (09 4 42 32 23 87
www.spigol.com

COLIN PALC
Z.A.
67170 MITTELHAUSEN
Tél: +33 (0) 3 88 51 22 22
Fax : +33 (0) 3 88 51 44 49

Mc CORMICK France SAS
Site Agroparc
315, rue Marcel Demonque
84917 AVIGNON Cedex 9
Tél: +33 (0) 4 90 63 89 89
Fax : +33 (0) 4 90 63 89 01

Usines :
Z.I. de Carpensud – BP 150
84971 CARPENTRAS CEDEX
Tél : +33 (0) 4 90 63 89 89
Fax : +33 (0) 4 90 63 89 01
http://www.ducros.fr
Quartier La Tapy – BP 17
84170 MONTEUX
Tél : +33 (0) 4 90 63 63 63
Fax : +33 (0) 4 90 63 63 43

DUCLOS TRADING
133 rue Victor Hugo
92270 BOIS-COLOMBES
Tél: +33 (0) 1 46 49 90 10
Fax: +33 (0) 1 46 49 90 60
duclos@duclostrading.com

GOLGEMMA
Domaine de Castillou
11190 LUC sur AUDE
Tél: +33 (0) 4.68 74 17 89
Fax : +33 (0) 4 68 74 15 79
info@golgemma.com

DAREGAL
6 bd Joffre – BP 8
91490 MILLY-LA-FORET
Tél : +33 (0) 1 64 98 29 00
Fax : +33 (0) 1 64 98 29 57
www.daregal.fr

EPICEA
Epices Aromates Assaisonnements
Zone d'Activités de la Brayelle
179, rue du Champ de Tir
59553 CUINCY
Tél : +33 (0) 3 27 87 61 29
Fax : +33 (0)3 27 87 21 85

EPICES FUCHS
1545 avenue JF Kennedy
ZI de Villefranche
84200 CARPENTRAS
Tél : +33 (0) 4 90 67 77 20
Fax : +33 (0) 4 90 67 27 05

FUCHS INDUSTRIE France
20 rue Alfred Kastler
Z.I. du Ried
67850 HERRLISHEIM
Tél : +33 (0) 3 88 55 33 55
Fax: +33 (0) 3 88 55 33 59

KERRY PRODUITS JAEGER
6 rue Robert Moinon – Z.I.
BP 433
95194 GOUSSAINVILLE CEDEX
Tél: +33 (0) 1 34 38 87 87
Fax : +33 (0) 1 39 92 92 71

LASERSON S.A
Z.I. B.P 57
91151 ETAMPES Cedex
Tél: +33 (0) 1 69 16 82 00
Fax: +33 (0) 1 64 94 98 97
info@laserson.com

LABORATOIRES J.P. DAUL
BP 89 – Ville-sur-Yron
54803 JARNY
Tél : +33 (0) 3 82 47 12 62
Fax : +33 (0) 3 82 33 96 92

LACO
28 Chemin de la Buzine
13396 MARSEILLE CEDEX 11
Tél : +33 (0) 4 91 36 40 36
Fax : +33 (0) 4 91 27 07 72
laco@tramier.fr
http://www.tramier.fr

LHG (laboratoire d'herboristerie générale)
269, route des 3 Lucs
La Valentine
BP : 87
13371 Marseille Cedex 11
Tél :+33 (0) 491 364 020
Fax : +33 (0) 491 431 405
info@lhg-fr.com

LE JARDIN DES EPICES
1, Faubourg des Vosges
68920 WINTZENHEIM
Tél : +33 (0) 3 89 27 11 51
Fax : +33 (0) 3 89 27 16 88

LES PRODUITS FRANÇAIS EVOLUTION
3, rue du Château de Selles BP 87
59400 CAMBRAI
Tél : +33 (0) 8 25 07 75 62
Fax : +33 (0) 3 27 37 28 40
www.lpfe.fr

M.P.E.
6 Chemin St Joseph - B.P. 25265
06131 GRASSE Cedex
Tél: +33 (0) 4 93 09 19 27
Fax: +33 (0) 4 93 77 89 88

MOGUNTIA EST EPICES
Site de Mundolsheim
6, rue Vauban BP 11066
67450 MUNDOLSHEIM
Tél : +33 (0) 3 88 20 40 88
Fax : +33 (0) 3 88 20 18 85

PROVA
46 rue Colmet Lepinay
93100 MONTREUIL
Tél : +33 (0) 1 48 18 17 20
Fax : +33 (0) 1 42 87 10 13

QUIMDIS S.A.
85 rue Edouard Vaillant - B.P 329
92307 LEVALLOIS PERRET Cx
Tél : +33 (0) 1 55 46 50 00
Fax: +33 (0) 1 47 39 91 90
quimdis@quimdis.com

ROCHIAS
Parc Technologique de Lavaur
63500 ISSOIRE
Tél : +33 (0) 4 73 55 68 68
Fax : +33 (0) 4 73 55 68 60

SACI - C.F.P.A.
9 rue Richepanse
75008 PARIS
Tél: +33 (0) 1 42 60 12 83
Fax: +33 (0) 1 42 61 42 79

SOCOHERB
1 bd Philippe Mabilly
13308 MARSEILLE CEDEX 14
Tél : +33 (0) 4 91 02 60 61
Fax : +33 (09) 4 91 02 81 28

SOFRAL
Usine de Strasbourg
223 route de Schirmeck
BP 40
67034 STRASBOURG CEDEX 2
Tél : +33 (0) 3 90 20 45 45
Fax : +33 (0) 3 90 20 45 46
www.sofral.fr

TRADIMPEX J.M. THIERCELIN
11-13 rue Gustave Eiffel
Z.I. St Nicolas
BP 23
94510 LA QUEUE EN BRIE
Tél: +33 (0) 1 45 93 02 32
Fax: +33 (0) 1 45 93 08 10

UNILEVER BESTFOODS FRANCE
Division AMORA MAILLE
48 Quai Nicolas Rolin – BP 670
21017 DIJON CEDEX
Tél: +33 (0) 3 80 44 44 44
Fax: +33 (0) 3 80 44 44 50
http://www.maille.com
Usine : Z.I. de la Norge
Tél : +33 (0) 3 80 44 44 44
Fax : +33 (0) 3 80 46 63 19
21800 CHEVIGNY-ST-SAUVEUR

Vanipro
Vanille et Produits
28/30 RUE VERDI
06000 NICE FRANCE
Tel: + 33 49705 22 90
contact@vanipro.com
http://www.vanipro.com

VANUA
124, rue de l'Epidème
59200 TOURCOING
Tél: +33 (0) 3 20 40 38 60
Fax : +33 (0) 3 20 40 38 61

JC VIGIN DISTRIBUTION
AROMATES DES GORGES DU VERDON
Les Escombettes
83630 BAUDUEN
Tél : +33 (0) 4 94 70 09 80
Fax : +33 (0)4 94 70 08 66

GERMANY

FUCHS GEWUERZE GmbH
Westring 15-17
49201 Dissen
Tel: +49 (0) 54 21/ 3090
Fax: +49 (0) 54 21 / 309111
info@fuchs-gewuerze.de
www.fuchs-gewuerze.de

FUCHS GmbH
Osterfeldstrasse. 2-8
49326 Melle-Wellingholzhausen
Tel: +49 (0) 54 29/ 2090
Fax: +49 (0) 54 29/ 209 403
info@fuchsspice.com

JANTZEN & DEEKE GmbH
Katharinenstrasse 30
20457 Hamburg
Tel: +49 (040) 376 8010
Fax: +49 (040) 374 3415
SCHWAB GmbH
Bei den Muhren 70
20457 Hamburg
Tel: +49 (040) 364 971
Fax: +49 (040) 367 790

RAPS GmbH & Co. KG
Adalbert-Raps-Strasse 1
95326 Kulmbach
Tel: +49 (9221) 80 70
Fax: +49 (9221) 807 100
www.raps.de
info@raps.de
bestellservice@raps.de

Hamburger Gewürz-Mühle
Hermann Schulz GmbH
Grossmannstrasse 221
D - 20539 HAMBURG
Tel.: +49 (0) 40 789 701-0
Fax: +49 (0) 40 789 701-30
info@gewuerzmuehle.de
http://www.gewuerzmuehle.de

HOT SPICY'S
Gewürzmuseum
Am Sandetorkai 32
20457 Hamburg
Tel: +49 (0) 40 36 79 89
Fax: +49 (0) 40 36 79 92
mail@spicys.de

CORNEHLS UND BOSSE
Kaeser Wihlem Strasse 115
20355 Hamburg
Tel: + 49 (0) 40 35 54 79 10
Fax: +49 (0) 40 35 54 79 17
hans.bargmann@cobo.de

KRAUTER MIX GmBH
Wiesentheider Strasse 4
97355 Abstwind
Tel : +49 (0) 93 83 204 287
Fax: +49 (0) 93 83 204 243
www.kraeuter-mix.de

NETHERLANDS

NEDSPICE PRODUCTS BV
Weena 260, 3012 NJ Rotterdam
P.O. Box 253
3000 AG Rotterdam
Tel: +31-(0) 10-2801380
Fax: +31-(0) 10-4147425
spices@nedspice.com
http://www.nedspice.com/

EUROMA
Koninklijke Euroma BV
Kloosterweg 3
P.O. Box 4
8190 AA Wapenveld
The Netherlands
Tel: +31 (0) 38 447 31 73
Fax: +31 (0) 38 447 31 95
Info@euroma.com
http://www.euroma.nl/

VERSTEGEN B.V
Spice and sauce
P.O Box 11041
3004 EA Rotterdam
The Netherlands
Tel: +31 (0) 10 245 51 00
Fax: +31 (0) 10 245 51 10

UNIFINE B. V
Your partner in foodsolutions
Weverseinde 343
3297 LJ Puttershoek
Tel: +31-(0) 78 6769245
Fax: +31-(0) 78 6762870
Ronald.Slot@Unifine.nl
http://www.wyko.nl/NL/1/

CATZ INTERNATIONAL B.V
Blackburg Building, Blaak 22
P.O. Box 180, 3000 AD Rotterdam
The Netherlands
Fax: +31 (0) 10 411 89 13
Tel: +31 (0) 10 411 34 40
tropical@catz.nl
http://www.catz.nl/Frameset_prod_spices.htm

SINGAPORE

Nomanbhoy & Sons PTE LTD
101 Cecil Street
#24-01 Tong Eng Building
Singapore 069533
Tel: +65 6224 13 13
Fax: +65 6225 29 19
nomanbhoysons@pacific.net.sg

V.V. Doshi Trading PTE LTD
Robinson Road P.O. Box 219
Singapore 900419
Tel: +65 6336 48 55
Fax: +65 6334 47 70
vvdoshi@singnet.com.sg
vvdoshi@poboxes.com

UNITED KINGDOM

VERSTEGEN LTD
Verstegen Spices & Sauces UK Ltd
Parkeston House, Parkeston Quay
Harwich, Essex CO12 4PJ
Phone: +44 (0)1255 554100
Fax: +44 (0)1255 551145
info@verstegen.co.uk
http://www.verstegen.co.uk/contactus.html

WORLD OF SPICE
Billerorcay Essex
CM 120 DT
Tel: +44 1277 633 303
Fax: +44 (0) 1277 633 036
www.Worldofspice.co.uk

STEENBERGS ORGANIC PEPPER & SPICE
P.O Box 48, Boroughbridge, York,
North Yorkshire YO51 9ZW
Tel: +44 17 65 64 00 88
Fax: +44 17 65 64 01 01
www.steenberg.co.uk

THE SPICE OF LIFE
P:O Box 18023, Aberdeen
Aberdeenshire AB23 8RB
Tel +44 1224 82 83 96

ISLAND SPICE Ltd
The Mii, Market Square, Kirkby Lonsdale
Carnforth, Lancashire LA6 2AF
Tel: +44 15242 716 55
Fax: +44 15242 71 655
www.islandspice.co.uk

ORGANIC HERB TRADING Co
Court farm, Milverton
Taunton, Somerset TA4 +nf
Tel: +44 1823 401 205
Fax: +44 1823 401 001
www.organicherbtrading.com
info@organicherb.com

THE SPICE SHOP
1, Blenheim Crescent
London W11 2EE
Tel: +44 20 7221 4448
www.thespiceshop.co.uk

MIDLAND HERBS & SPICES
Unit 1a, Formans Trading Estate
Pentos Drive
Birmingham, West Midlands B11 3TA
Tel: +44 (0) 121 778 5771
Fax: +44 (0) 121 777 1348
Mail.midland.herb@virgin.net
www.midlandherb.com

COTSWOLD HEALTH PRODUCTS Ltd
5-8, Tabernacle RD
Wotton-under-edge
Gloucestershire GL12 7EF
Tel: +44 (0) 1453 84 36 94
Fax: +44 (0) 1453 521 375
sales@cotsherb.co.uk
www.cotsherb.co.uk

RAFI'S SPICE BOX
3, Gaol lLane, Sudbury
Suffolk CO10 1JL
Tel: +44 (0) 1787 88 1992
www.spicebox.co.uk

SPICETECH UK Ltd
15 Buxton Road, Disley
Cheshire, SK12 2DZ, UK
Tel: +44 (0) 162 561 1888
products@spicetech.co.uk
http://www.spicetech.co.uk

JULAIN GRAVES Ltd
Unit 95, The Pensnett State
King Swinford, West Midlandis
DW6 7FT
Tel: +44 (0) 384 282 700
Fax: +44 (0) 384 282 716
andrewclarke@julian.co.uk
www.juliangraves.co.uk

GREEN CUISINE Ltd
Unit 3, Threxton Industrial Estate,
Watton
Thetford, Norfolk IP25 6NG
Tel: +44 (0) 1953 882991
Fax : +44 (0) 1953 885 401
greencuisine@btinternet.com
www.greencuisine.co.uk

SPICE BLANDERS Ltd
5, Malton St, Hull,
North Humberside HU9 1BA
Tel: +44 1482 226415
Fax +44 148 232 9274
sales@spiceblenders.co.uk
www.visprod.co.uk

British Pepper & Spice Co.Ltd
Rhosili Rd
Brackmills Industrial Estate
Northampton, Northamptonshire NN4 7AN
Tel: +44 (0) 1604 766461
Fax: +44 (0) 1604 73 156
www.britishpepper.co.uk
sales@britishpepper.co.uk

Annex 2: Other Useful Addresses

European Spice Association (ESA)
Reuterstraße 151
53113 Bonn, Germany
Tel: +49 228 21 61 62
Fax: +49 228 22 94 60
ESA@verbaendebuero.de

Syndicat national des transformateurs de poivres, épices, aromates et vanille (S.N.P.E.)
8, rue de l'Isly
75008 Paris, France
Tel: +33 1 45.22.56.05

Fédération des Industries de la Parfumerie (F.I.P.)
8, place du Général Catroux
75017 PARIS, France
Tel: +33 1 44.15.83.83

Seasoning and Spice Association
6 Catherine Street
London WC2B 5 JJ
United Kingdom
Tel: +44 207-836 24 60
Fax: +44 207 836 05 80

Fachverband der Nahrungs-und Genussmittel-Industrie Österreichs
P. O. Box 144
1037 Vienna, Austria
Tel: +43-1 7122121
Fax: +43-1 7131802

Fachverband der Gewürzindustrie ev.
Reuterstrasse 151
D-53113 Bonn, Germany
Tel: +49 228 216 162
Fax: +49 228 229 460

Danish Spices Associationc/o Scandeco Ltd.
Dampfeergevej 21
232100 Copenhagen, Denmark
Tel: +45 31 179409
Fax: +45-35 262904

The American Spice Trade Association
2025 M Street NW
Suite 800
Washington, DC 20036, USA
Tel: +1 202 367 1127
Fax: +1 202 367 2127
www.astaspice.org

Food Standards Agency
Aviation House125
Kingsway
London WC2B 6NH
United Kingdom
Tel: +44 207 276 8000
www.foodstandards.gov.uk

Nederlandse Vereniging Voor de Specerijhandel
(Netherlands Spice Trade Association)
c/o Van Sillevoldt Specerijen B.V.
P.O Box 64
Paperndrecht 3350 AB, Netherlands
Tel: +31-78 6151755
Fax: +31-78 6153107

British Essential Oil Association (BEOA)
15 Exeter Mans
London, United Kingdom
Tel: +44 20-8450-3713
Fax: +44 20-8450-3197

International Organization for Standardization (ISO)
1, rue de Varembé
Case postale 56
1211 Geneva 20, Switzerland
Tel: +41 22 749 01 11
Fax: +41 22 733 34 30
www.iso.org
Email: Central@ISO.org
www.iso.org

International Federation of Organic Agriculture Movements (IFOAM)
C/o Ökozentrum Imsbach
66636 Tholey-Theley, Germany
Tel: +49 6853 919 890
Fax: +49 6853 919 899
http://www.ifoam.org

Duales System Deutschland AG
Frankfurter Straße 720-726
51145 Köln, Germany
Tel: +49 22 03 93 70
Fax: +49 22 03 93 71 90
www.gruener-punkt.de

European Flavour & Fragrance Association (EFFA)
Square Marie-Louise, 49
1000 Brussels, Belgium
Tel: +32 2 238 99 05
Fax: +32 2 230 02 65
E-mail: secretariat@effaorg.org
www.effa.be

International Federation of the Essential Oil and Aroma Trades (IFEAT)
GATFA House
6 Chapel Place
Rivington Street
London EC2A 3SH
United Kingdom
Tel: +44 20 7729 5904
Fax: +44 20 7814 8383
E-mail: secretariat@ifeat.org
http://www.ifeat.org

The European Cosmetic toiletry and perfumery association (COLIPA)
Avenue Herrmann Debroux 15A
1160 Auderghem – Brussels
Belgium
Tel: +32 2 227 66 10
Fax: +32 2 227 66 27
E-mail: colipa@colipa.be
http://www.colipa.com

United Nations Economic Commission for Europe (UN/ECE)
Palais des Nations
1211 Geneva 10
Switzerland
Tel: +41 22 917 12 34
Fax: +41 22 917 05 05
www.unece.org

AB Bodén & Lindeberg
Arninge Industriområde, TÄBY
Sweden
Box 7072
187 12 TÄBY
Sweden
tel 08-544 408 00
fax 08-544 408 20
info@bodenlindeberg.se

Annex 3: Import Promotion Offices

DENMARK
DIPO (The Danish Import Promotion Office for Products from Developing Countries)
Borsen
1217 COPENHAGEN K
Tel: +45 339 505 00
Fax: +45 331 205 25
E-mail: dipo@commerce.dk
www.dipo.dk

GERMANY
Deutsche Gesellschaft für Technische Zusammenarb. (GTZ) GmbH
Dag-Hammarskjöld-Weg 1-5
65760 ESCHBORN
Tel: +496 196 791 229
Fax: +496 196 796 150
www.gtz.de/english

ITALY
Istituto Nazionale per il Commercio Estero (ICE)
Via Liszt, 21
00144 ROME EUR
Tel: +39 06 599 294 84
Fax: +3906 542 200 07
E-mail: cooperazione@ice.it
www.italtrade.com

NETHERLANDS
Centre for the Promotion of Imports from Developing Countries (CBI)
Beursplein 37, 5th Floor
P.O. Box 30009
3001 DA ROTTERDAM
Tel: +31 10 201 34 34
Fax: +31 10 411 40 81
E-mail: cbi@cbi.nl
www.cbi.nl

SWEDEN
Association of Swedish Chambers of Commerce
P.O. Box 16050
103 21 STOCKHOLM
Tel: +46 8 555 100 00
Fax: +46 8 566 316 35
E-mail: tradeoffice@chambertrade.com
www.cci.se

Annex 4 Tariffs

Tariff barriers for cloves reported by the EU in 2005

Tariff measures	Tariff ad-valorem
MFN duties (Applied)	8%
European Union rate	0%
Preferential tariff for Overseas Countries and Territories	0%
Preferential tariff for Generalized System of Preferences countries	2.8%
Preferential tariff for Least Developed Countries	0%
Preferential tariff for African, Caribbean and Pacific States (associated with EEC) countries	0%
Preferential tariff for Andorra	0%
Preferential tariff for Albania	0%
Preferential tariff for Bosnia and Herzegowina	0%
Preferential tariff for Croatia	0%
Preferential tariff for Macedonia	0%
Preferential tariff for Yugoslavia	0%
Preferential tariff for Egypt	0%
Preferential tariff for Gaza strip	0%
Preferential tariff for Jordania	0%
Preferential tariff for Lebanon	0%
Preferential tariff for Syria	0%
Preferential tariff for Chile	1.1%
Preferential tariff for Mexico	0%
Preferential tariff for South Africa	0%
Preferential tariff for Turkey	0%
Preferential tariff for countries beneficiary of the incentive arrangement for sustainable development	0%
Preferential tariff for Bulgaria	0%
Preferential tariff for Romania	0%

Source: national data reported to UNCTAD (TRAINS) and ITC (Market Access Map)

Annex 5: Selected Periodicals

Foodnews
Agra Europe
80 Calverley Road
Tunbridge Wells
Kent TN1 2UN
United Kingdom
Tel: +44 1 892 533 813
Fax: +44 1 892 511 803
www.agra-food-news.com

Eurofood
Agra Europe
80 Calverley Road
Tunbridge Wells
Kent TN1 2UN
United Kingdom
Tel: +44 1 892 533 813
Fax: +44 1 892 511 803
www.agra-net.com

The Public Ledger
80 Calverly Road
Tunbridge Wells
Kent TN1 2UN
United Kingdom
Tel: +44 1 892 533 813
Fax: +44 1 892 511 803
www.public-ledger.com

Marchés tropicaux et méditérranéens
56 rue de l'Université
75007 Paris
France
Tel: +33 1 53 63 10 80
Fax: +33 1 45 48 75 32
info@marches-tropicaux.com

Oils and fats international
dmg world media (uk) ltd
Westgate House
120/130 Station Road
Redhill
Surrey
RH1 1ET
Tel: +44 (0) 1737 855000
Fax: +44 (0) 1737 855475

Perfumer & Flavorist
Customer Service
subscriptions
PO Box 323
Oregon, IL 61054 0506
USA
Tel: +1 815-732-9004
Fax: +1 815-732-9889
http://www.perfumerflavorist.com

Annex 6: Sources of Information

Soap, Perfumery and Cosmetics, various issues

Foodnews, various issues

International trade in cloves, nutmeg, mace, cinnamon, cassia and their derivatives, July 1986, Tropical Development and Research Institute, United Kingdom.

Trends on the World Markets for Spices and Quality and Safety Concerns, International Trade Centre UNCATD/WTO, 1996.

Global Overview of International Trade and Consumption of Spices, International Trade Centre UNCATD/WTO, 1996

The global spice trade and the Uruguay round agreements, International Trade Centre UNCATD/WTO, Commonwealth Secretariat, 1996.

Clean Spices, A guidebook for shippers of products to the U.S. spice trade; The American Spice Trade Association, 1991, revised 2000.

The Public Ledger; 80 Calverly Road; Tunbridge Wells; Kent TN1 2UN; UK: http://www.public-ledger.com

Marchés tropicaux et méditerranéens; 190 Boulevard Haussmann; 75008 Paris; France: http://www.marches-tropicaux.com

Spices, Tropical agricultural series, Longman Group Limited, 1981.

Market Brief – Spices and Herbs, Danish Import Promotion Office for Products From Developing countries (DIPO), 2003

Market Brief – Spices, Swedish International Development Cooperation Agency (SIDA), 2003

Oils and fats international, various issues

Marchés tropicaux et méditérranéens, varios issues

National Agency for Export Development, Indonesia

Perfumer & flavorist, various issues

Indian spices, various issues

Produits d'épicerie sèche, janvier 2001, Centre français du commerce extérieur (CFCE)

Transport information service (GDV), cargo loss prevention information from German marine insurers, http://www.tis-gdv.de/tis_e/ware/gewuerze/nelken/nelken.htm#informationen

ITC: Your Partner in Trade Development

The International Trade Centre (ITC) is the technical cooperation agency of the United Nations Conference on Trade and Development (UNCTAD) and the World Trade Organization (WTO) for operational, enterprise-oriented aspects of trade development.

ITC supports developing and transition economies, and particularly their business sectors, in their efforts to realize their full potential for developing exports and improving import operations.

ITC works in six areas:

- Product and market development
- Development of trade support services
- Trade information
- Human resource development
- International purchasing and supply management
- Needs assessment, programme design for trade promotion

International Trade Centre
UNCTAD/WTO

ITC: Your partner in trade development

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Telephone: +41 22 730 0111 *fax:* +41 22 733 4439 *e-mail:* itcreg@intracen.org *Internet:* http://www.intracen.org