



Food and Agriculture
Organization of the
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World Health
Organization

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Agenda item 7.1

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JOINT FAO/WHO FOOD STANDARDS PROGRAMME
CODEx COMMITTEE ON SPICES AND CULINARY HERBS

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DISCUSSION PAPER ON TRADE DATA AVAILABILITY FOR SPICES AND CULINARY HERBS

(Prepared by the United States of America)

INTRODUCTION

1. Recognizing the difficulty in obtaining sufficient disaggregated trade data related to production and multilateral trade for spices and culinary herbs (SCH) to support new work proposals, the 7th session of the Codex Committee on Spices and Culinary Herbs (CCSCH7, 2024) accepted an offer from the United States to prepare a Discussion Paper on Spices and Culinary Herbs (SCH) trade data availability with the objective to facilitate future deliberations by the Committee. In preparing this Discussion Paper, the United States considered the Committee's experiences in developing standards and their formal leadership of the CCSCH Priorities Working Group.

BACKGROUND

2. The issue of trade data availability to facilitate the development of individual and group standards by the Committee has been discussed at every CCSCH session. Through all of those sessions, this issue has impeded proposals for standard development. In addition, Section 2.4 of the Codex *Procedural Manual* recommends that an assessment of the "Volume of production and consumption in individual countries and volume and pattern of trade between countries" be provided in the project document and the justification of new work. Challenges in obtaining individual SCH trade data raises concerns that not all the 109 SCH identified by the CCSCH will be standardized either individually or in the group format.

KEY FACTORS IN CONSIDERING TRADE DATA FOR SPICES AND CULINARY HERBS

a) Unique characteristics of the SCH sector:

- SCH trade, collectively referred to as the "spice trade", is one of the first global industries. Spices have been traded regionally and internationally for at least 4,000 years.
- Production and processing of SCH are mainly undertaken by small producers in developing countries who seldom keep written records.
- Dried SCH are largely collected and purchased from farms, by rural agents, and intermediaries which act as a buffer between the producer and the final packer. These intermediaries sometimes keep temporary records solely for payment and not for data collection or traceability purposes.
- In many producing countries, production acreage and yields of fresh SCH are usually estimated and recorded for governmental planning/policy implementation purposes. However, the percentage of the yield that is converted to dried SCH is usually not recorded.
- The spice trade in many regions is largely informal and with minimal government oversight. Therefore, in many cases volumes and values of SCH in trade are not officially recorded.
- Many SCH are unique to a geographic region with informal production and trade practices and subject to minimal government oversight.
- When compared to other agricultural commodities traded, SCH while lower in weight or tonnage which is a traditional way of measuring trade volumes, they are higher in economic value.

b) Global Demand for SCH

3. The global demand for SCH is growing and consumption of a wider variety of SCH beyond their national and traditional markets is being consumed. Thus, the need for SCH international standards for consumer protection and trade facilitation is heightened. Revenue from SCH trade is projected to reach US \$3.22 billion in 2025 and an annual growth rate (CAGR 2025-2029) of 12.30%, resulting in a projected market value of US \$5.12 billion by 2029. (Source Statista)

ISSUE: DATA REQUIREMENT TO JUSTIFY THE DEVELOPMENT OF A CODEX STANDARD

4. The Codex *Procedural Manual*, Section 2.4 recommends the provision of “Volume of production and consumption in individual countries and volume and pattern of trade between countries” to establish the need for and prioritization of new work. While volume of production and consumption is a good indicator for many commodities it is misleading for SCH which have a low weight/volume but are high value. For most SCH, volume data are difficult to attain. In many cases, the data are not existent for several reasons including the following:

(i) Lack of SCH Production and Trade Data

5. The lack of specific individual SCH production and trade data is largely attributed to the practice of comingling the majority of individual SCH (different species) data at production and trade (export and import) under a common heading “spices” and/or “culinary herb”. Data on individual SCH are often not officially collected and reported on at the national level. In some cases, industry or commodity producer organizations are the only source of individual SCH production and trade data.

6. Historically, SCH production and utility are regional and eventually spread to other regions through trade. Many of the SCH are still produced and traded mainly within a single geographic region (e.g., Asia). In many cases, the trade is informal (i.e., outside the official documented and regulated system and so not recorded). Therefore, this trade data does not flow to the data sources recognized by Codex. Thus, making it difficult to attain accurate and reflective trade information to meet the Codex requirement for development of a standard. Due to modern communication technology (e-commerce) and modern consumerism, SCH that were regional in production and use in the past, are currently available worldwide within a few days of placing an order. Thus, worldwide consumer demand significantly influences the need for standards to provide safety guarantees not just to traders but also direct consumers.

(ii) Lack of international trade data collected by the United Nations

7. National production and trade data on all agricultural produce is typically provided to the United Nations Food and Agricultural Organization’s (FAO’s) statistical database (FAOSTAT). FAOSTAT is the foremost information source for the international agricultural sector. However, FAOSTAT does not include data for many spices or has incomplete data for those that it does track. Therefore, Codex Member Countries submitting project proposals for new SCH standards cannot obtain accurate information on SCH production and trade information from FAOSTAT.

(iii) Lack of individual Harmonized Tariff Codes (HTCs)

8. Only 41 of the 109 identified SCH have a Harmonized System (HS) Code. This means that specific individual SCH international trade data is non-existent for 68 SCHs (or 60% of SCH). The absence of individual HS codes for every individual SCH traded internationally also negatively affects the trade data provisions in the Codex *Procedural Manual*. HS codes are assigned by the World Customs Organization on the request of member countries that provide evidence that the individual commodity for which the code is requested must have a minimum annual trade of \$50 Million USD. The HS codes facilitate ease of collection and compilation of trade data (i.e., volume and value of individual moving in international trade).

9. Additionally, another source of trade information recognized by Codex, the World Trade Organization (WTO), depends on HS data. The forementioned trade information sources recognized by Codex (FAOSTAT and HTC) group individual SCH under a single general heading “spices” or “culinary herbs”. This poses problems for CCSCH and member countries in preparing project proposals to request the development of a Codex standard for the SCH. Sometimes efforts by Member Countries are stymied by the lack of the required supporting information.

10. Though governments regularly plan production volumes or acreages and measure the success of production using forecasted yields, export volumes and domestic utility, the granular information generated is sometimes not available to inform the trade criteria for the establishment of work priorities.

11. The strict adherence to Codex’s “production and trade information” requirement will limit CCSCH standard development for SCH both for individual and group standards. This trade information requirement also raises the

possibility that the majority of the 109 SCH identified for standardization by CCSCH will not be standardized. This is particularly challenging for countries with rural populations whose livelihoods are directly tied to specific SCH production and trade as well as for importers and consumers

(iv) Physical Characteristics of Dried SCH

12. When compared to other agricultural commodities, dried SCHs weigh significantly less, but have higher economic value per weight unit. Depending on the individual SCH physiological characteristics, drying reduces the mass/weight between 65 to 90 percent in the whole and cut styles. Therefore, the volume of individual dried SCH traded is often considered miniscule in macroeconomic data, particularly when their economic value is not taken into consideration. Because of the lower weights, very often recording the trade data is overlooked.

13. The physical characteristics – low mass of dried SCH has led to a thriving online market of 1.2 billion units in 2020¹ according to one study. These sales are mainly individual retail packages sold directly to the final consumer and most often are not recorded or reflected in international trade data.

RECOMMENDATION

14. The approval process for development of a Codex standard development considers production and trade data based on the guidance of the Codex *Procedural Manual*. This criterion is not achievable for most of the SCH.

15. For CCSCH to fulfill its mandate more efficiently and develop standards for all or almost all of the 109 named SCHs, the following areas are suggested for the Committee's consideration:

- (i) Focus on group standard development. First, completing standards for SCH groups having the most commodities already standardized.
- (ii) When developing a group standard, there should be sufficient information available to complete both Annex I on Chemical and Physical Characteristics and Annex II Methods of Analysis and Sampling.

¹ <https://www.astuteanalytica.com/industry-report/spices-seasonings-market#>