

Exporting fresh strawberries to Europe

Strawberries are the most popular summer soft fruit in Europe. Most countries in Europe have a proper production season contributing to a total annual production of 1.3 million tonnes. Greenhouse production and diverse varieties extend these seasons, making Europe almost fully self-sufficient. The export opportunities to Europe can be found in the supply gaps between Mediterranean and northern European production. As a supplier, you should ideally focus on strawberry varieties that are superior in flavour. Efficient logistics are important for successful export.

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1. Product definition

The common strawberry is known as the garden strawberry, a hybrid species of the genus *Fragaria* (*Fragaria* × *ananassa*). In the northern hemisphere, a wild variety grows naturally, known as wild or woodland strawberry (*Fragaria vesca*).

In northern Europe, most varieties are short day plants or Junebearers that hibernate in winter, such as the Elsanta, Sonata, Clery and Malling Centenary. The Everbearer and the Dayneutral varieties are more common in southern Europe.

In Spain, the largest producer and exporter of strawberries in Europe, the Camarosa, Fortuna, Sabrina and Candonga are among the popular varieties.

Table 1: CN commodity code for fresh strawberries

Number	Product
081010	Fresh strawberries

Source: Eurostat Comext

2. Which European markets offer opportunities for exporters of fresh strawberries?

Strawberries are a popular summer fruit with strong local supply

Strawberries are one of the most popular summer fruits in Europe. The total European import and internal trade amounted to 503,000 tonnes of strawberries in 2017, but well over 90% can be attributed to re-export and internal trade of local produce.

Developing countries exported almost 35,700 tonnes of strawberries to Europe in 2017. The market for

strawberries is large, but long-distance import is often required to cover either a supply gap or temporary shortage. You must be aware of these supply gaps or be able to differentiate your product if you want to participate in the European strawberry market. The quality of European strawberries is very high.

The consumption of strawberries in Europe is estimated to be around [1.2 million tonnes](#). Italy, Germany and the United Kingdom have the [highest consumption per capita](#) with 3 kilos per year. The [average consumption in Europe](#) was 1.64 kilo per capita in 2016. When accounting for import, export and production statistics, the average consumption sums up to 2.66 kilo per capita in 2016.

Tips:

Keep yourself up to date on market conditions and read news sources such as the regular [overview of the global strawberry market](#) on Freshplaza and other articles on [Fruitnet](#).

See Figure 5 in the competition section for more details on potential supply gaps.

Distribution and origin vary between European markets

Strawberries are consumed all over Europe. While the largest importers are Germany and France (see Figure 2), according to statistics the top importers from developing countries are Spain, France, Belgium and Germany, ranging from 14 to 4,000 tonnes.

The distribution and import origin varies between the different European countries:

- Egyptian strawberries are flown into the Netherlands, Germany and Belgium.
- Moroccan suppliers find most of their opportunities in Spain and France.
- Turkey finds a good market for strawberries in Romania.
- Jordan exports minor volumes to the Netherlands and the United Kingdom.
- Albania has a growing export to Italy.
- Peru manages to export some 200 tonnes, mainly to Spain.

Except for Morocco and Turkey, strawberries from these countries generally have to be airfreighted to Europe.

Belgium and the Netherlands are important trading countries for strawberries, especially from less common origins such as Jordan and Ethiopia. These trade hubs are important to consider when you are introducing supply from a new origin.

Tip:

Learn more about the developments on the European market. Participate in international congresses such as the [International strawberry congress](#) in Belgium, the [Global berry congress](#) in the Netherlands or the [International strawberry symposium](#) in Italy. Some of the [presentations](#) for previous events have been made public.

Spain is a counterseason supplier for northern Europe

Spain serves almost as a counter-season supplier for northern Europe. As soon as Spain enters the market with full force from February to May, it becomes more difficult to compete as a non-European supplier. Early in the season, the Spanish supply is complemented by growers in Morocco and Egypt. These growers are very competitive in pricing. Spain is also the main re-exporter of Moroccan strawberries.

If you aspire to export strawberries to Europe, you must be either very price competitive, export a superior quality or avoid the Spanish high season and look for opportunities between the European growing seasons between October and January.

Tip:

Calculate your total cost and feasibility to reach European clients well, including shipping. Long-distance suppliers usually have high airfreight costs or inefficient supply routes, which makes trade less attractive.

3. Which trends offer opportunities in the European market for strawberries?

Technological improvements in strawberry production

In Europe, growers are adopting more and more technology in their strawberry production. A significant number already work with a form of protected horticulture, using substrates, plastic tunnels or glass greenhouses. This technological improvement is accompanied by developments in improving strawberry cultivars, such as early-growing or [late-season varieties](#).

As a result, strawberry farms in Europe not only gain more control and efficiency in production, but also extend their production seasons. Consumer demand is encouraged by an almost year-round supply of quality strawberries. So while consumption is increasing, the window of opportunity for external suppliers is becoming narrower.

Tips:

See below for information about competition and Figure 5 for the availability and supply windows for strawberries.

Keep up to date on horticultural innovations for strawberries, for example through [publications of the International Society for Horticultural Science](#).

Flavour and appearance are important

Flavour is becoming increasingly important to European consumers, as is the appearance of the fruit. Consumers are prepared to pay a premium for high-quality, tasty strawberries. Taste and sweetness is a common argument for buying local strawberries, especially in northern Europe. The varieties, climate and production methods are different here from those in the Mediterranean region, giving locally produced strawberries a very good reputation.

When exporting strawberries to Europe, it is important to pay attention to quality and taste and understand how consumers experience your product. By supplying superior-tasting strawberries, you will motivate consumers to continue purchasing your product.

Tip:

Make sure that supply chain logistics and transport processes do not negatively affect the flavour and appearance of the product in any significant way.

Growing interest in sustainable fruit

In Europe, trends in the consumption of fresh fruit are developing towards more sustainable approaches to production and processing. Environmental and social issues are becoming increasingly important. European buyers of strawberries include actions aimed at sharply reducing and registering the use of pesticides and avoiding inefficient airfreight or heated greenhouse production.

Suppliers that operate in line with the [Global Social Compliance Programme \(GSCP\)](#) are more likely to be accepted by European supermarkets.

Tip:

Consult the [Global Social Compliance Programme \(GSCP\)](#) website for more information about social and environmental conduct.

Organic demand becomes stronger

The increased attention to health and the environment is also generating more interest in organically produced fruits and vegetables. The demand for organic is strongest in northern Europe.

Strawberry is a difficult fruit to produce organically, so the number of organic growers is limited. Poland is the leading [organic strawberry](#) producer with just over 6,000 tonnes in 2016, but with a very short season. Spain and Germany produced 5,000 tonnes and 3,000 tonnes of organic strawberries respectively in 2016.

Organic strawberries can be an interesting niche, especially for smaller companies that can dedicate more attention to labour-intensive growing. However, the limited shelf life of organic strawberries will demand a lot from your logistical organisation.

Tips:

Evaluate the feasibility of organising a supply chain for organic strawberries before starting in organic trade.

Find importers of organic fruit on [organic-bio.com](#), a company database for organic products.

Read more about what [trends offer opportunities for fresh fruit and vegetables](#) on the CBI market intelligence platform.

4. What requirements must fresh strawberries comply with to be allowed on the European market?

What legal and non-legal requirements must your product comply with?

Minimise pesticides

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers. Of all fruits, [strawberries are the most likely to exceed the legal limit of residues](#). The European Union (EU) has set maximum residue levels (MRLs) for strawberries.

Products containing more pesticides than allowed will be withdrawn from the European market. Note that buyers in several Member States, such as the United Kingdom, Germany, the Netherlands and Austria, use MRLs which are stricter than the MRLs laid down in EU legislation.

Tips:

To find out the MRLs that are relevant for strawberries, you can use the EU [MRL database](#), in which all harmonised MRLs can be found. You can search for your product or the pesticide used; the database will show the list of the MRLs associated with your product or pesticide.

Reduce the amount of pesticides by applying [integrated pest management](#) (IPM) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.

For other general requirements concerning contaminants, traceability and plant health control, check the buyer requirements for fresh fruit and vegetables on the [CBI market intelligence platform for fresh fruit and vegetables](#).

Quality standards

The quality and marketing of your product must comply with the [marketing standard for fresh strawberries](#) published by the Working Party on Agricultural Quality Standards of the United Nations Economic Commission for Europe (UNECE).

Marketing standards for processed strawberries can be found in the Codex Alimentarius:

- [Marketing standard for quick frozen strawberries](#)
- [Marketing standard for canned strawberries](#)

Fresh strawberries must be:

- intact, undamaged;
- sound – produce affected by rotting or deterioration such as to make it unfit for consumption is excluded;
- clean, practically free of any visible foreign matter;
- fresh in appearance, but not washed;
- practically free from pests;
- practically free from damage caused by pests;
- including the calyx (except in the case of wood strawberries) – the calyx and the stalk (if present) must be fresh and green;
- free of abnormal external moisture;
- free of any foreign smell and/or taste.

Europe almost exclusively demands 'Extra' Class or Class I strawberries, which means they have to be of good or superior quality with only a small margin permitted for defects in shape, pressure marks and white patches. These classes are also documented in the [marketing standard for strawberries](#).

Conformity checks are part of [European Regulation \(EC\) No. 1580/2007](#). In the event of non-compliance, your product can be rejected. In certain third countries, local inspection bodies are allowed to carry out pre-export checks instead of subjecting products to European conformity checks.

Size requirements

In the [marketing standard for strawberries](#), size is determined by the maximum diameter of the equatorial section. The minimum size should be:

- 25 mm for 'Extra' Class 1;
- 18 mm for Classes I and II.

There is no minimum size for wood strawberries (or wild strawberries).

Sweetness

Additionally to the marketing standards, buyers will not accept strawberries with a sugar level lower than 8 brix. The most ideal brix level is between 12 and 16, but regular varieties with a brix of 10-13 are very common.

Packaging

The most common packaging for strawberries are punnets between 250 g and 500 g. Discuss the preferred packaging with your clients.

The strawberries must be packed in such a way as to protect the produce properly. The materials used inside the package must be clean and of a quality such as to avoid causing any external or internal damage to the produce.

The use of materials, particularly of paper or stamps bearing trade specifications, is allowed, provided the printing or labelling has been done with non-toxic ink or glue. Packages must be free of all foreign matter.

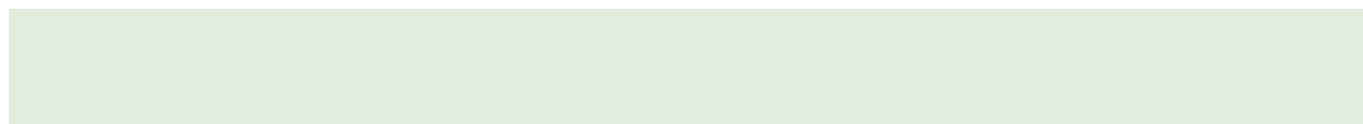
Your packaging must be in compliance with the [Code of Practice for Packaging and Transport of Fresh Fruits and Vegetables](#).

Labelling

The label or marking of each box should at least give the following information:

- name and physical address of the packer and/or dispatcher (which can be replaced by an officially recognised code mark);
- name of the product (if not visible from the outside) and the commercial type;
- country of origin;
- commercial identification: class, size in minimum and maximum weight or diameter and, optionally, number of units;
- officially recognised code mark or traceability code (for example [Global Location Number](#) (GLN) or [GLOBALG.A.P. Number](#) (GGN) (recommended).

In addition, the label should include a certification logo (if applicable) and/or retailer logo (in the case of private label products).



Tips:

Consult the [EU Trade Helpdesk](#) for a full list of requirements for strawberries, selecting the product code: 08101000.

Make sure to supply the quality you agreed upon with your buyer. Small deviations can be an argument for your buyer to make a claim or reject the shipment.

Which additional requirements do buyers often have?

Certification as guarantee

Since food safety is a top priority in all European food sectors, you can expect most buyers to request extra guarantees from you in terms of certification.

The most commonly requested certification for strawberries is [GLOBALG.A.P.](#), a pre-farm-gate standard that covers the whole agricultural production process, from before the plant is in the ground to the non-processed product. It is nearly impossible to supply fruit without GLOBALG.A.P., as it has become practically a standard requirement for most supermarkets.

Examples of other food safety management systems that may be required are:

- [BRC](#) (British Retail Consortium)
- [IFS](#) (International Food Standard)
- [FSSC22000](#) (Food Safety System Certification)
- [SQF](#) (Safe Quality Food Programme)

These management systems are supplemental to GLOBALG.A.P. and are recognised by the [Global Food Safety Initiative \(GFSI\)](#).

Tips:

Identify the food safety management systems that are usually requested in your target market. Expect GLOBALG.A.P. to be one of them.

Read more on the various food safety management systems on the [Standards Map](#) website.

Always remember that food safety is a major issue. Work proactively with buyers to improve food safety, be transparent and remain up to date with regard to buyer requirements and regulations.

Social and environmental compliance

There is growing attention for the social and environmental conditions in the producing areas. Most European buyers have a social code of conduct which they will expect you to adhere to. For strawberries, social compliance is important, although product quality has top priority.

It can be a plus to be [GRASP](#) certified. GRASP is a social add-on of GLOBALG.A.P. and an accessible certification that is gaining importance in Europe.

Another good option is implementing standards recognised by the [Sustainability Initiative Fruit and Vegetables \(SIFAV\)](#), which consists of an initiative from traders and retailers to become 100% sustainable in sourcing from

Tips:

Examine your company's current performance, for example by completing a self-assessment on the [amfori/BSCI website](#).

For a complete overview of buyer initiatives for social compliance, see the [Buyer requirements for fresh fruit and vegetables](#) on the CBI marketing intelligence platform.

What are the requirements for niche markets?

Organic: A growing niche market

An increasing number of consumers prefer food products that are produced and processed by natural methods. Organic certification is not a main requirement, but is an interesting selling point considering the limited offer of organic strawberries.

You will find most opportunities for organic fruit in northern Europe, especially in German-speaking and Scandinavian countries.

In order to market organic products in Europe, you have to use organic production methods according to [European legislation](#) and apply for an organic certificate with an accredited certifier.

Tips:

Consider organic as a plus, not as a must, and be prepared to comply with the whole organic process. Remember that implementing organic production and becoming certified can be expensive.

Read more about the principles of organic agriculture on the [website of IFOAM Organics International](#) and about the requirements related to organic farming in the [CBI buyer requirements for fresh fruit and vegetables](#).

5. What competition will you be facing on the European strawberry market?

New off-season suppliers

Even though most countries are self-sufficient in their demand for strawberries, there are still gaps in the supply windows that are interesting for international growers. Relatively new suppliers that fill these gaps with small volumes are for example Ethiopia, Jordan and Peru.

From Ethiopia and Jordan, supplies go to the Netherlands and some to the United Kingdom. Peru has managed to find opportunities in Spain. Well-managed farms from these countries are focused on the high-end market in the off-season period (November-December). They meet the demand for a year-round supply.

Low-price competition from Egypt and Morocco

Strawberries from Egypt and Morocco are very price-competitive. They overlap with the Spanish season in early

spring, but start their harvest earlier and generally with lower labour costs.

Morocco is well positioned, being close to Spain, which is their main export market.

Egyptian airfreighted strawberries are competitive thanks to subsidised fuel. Egypt exports mostly Class I strawberries through trade hubs in the Netherlands, from where they are distributed to other European markets.

Tip:

In difficult seasons, aim for premium markets if you are not competitive on price. However, make sure your product is of exceptional quality and differentiate your product from the larger low-cost suppliers. Buyers are searching for full-coloured, sweet strawberries.

Competition between varieties

Future competition will not be limited to price. Taste (high brix level) and shelf life are gaining importance. Growers try to differentiate and gain an advantage over their competitors by looking for alternative varieties.

In northern Europe, the Elsanta has been the dominant variety for many years, praised for its high yield and long shelf life. However, interest in other, superior tasting varieties has increased, such as the Sonata, a sweeter and weather-resistant variety or the Lambada, a more exclusive sweet and juicy variety.

In the United Kingdom, [the Malling Centenary and the Driscoll Elizabeth cultivars](#) have proven to be the best tasting strawberries according to local consumers.

In Spain, the Candonga strawberry is increasing in popularity at the expense of other varieties, such as the Camarosa variety, thanks to its superior consumer experience.

In general, the new [sweeter varieties are gaining terrain](#) over the traditional varieties. However, each strawberry has its own market. At the same time, it is not uncommon for low-priced strawberries to compete with superior varieties. It is not a black and white market.

Tip:

Strengthen your knowledge about strawberry cultivars and work together with growers to find or develop interesting varieties for your production region.

Small window of opportunity in winter

The European season (from south to north) runs from February/March up to November. In northern Europe, especially in the Netherlands, Belgium and the United Kingdom, the season starts and ends with greenhouse production. A variation of early and late cultivars extends their season. The largest producers in Europe are Spain, Poland, Germany and Italy.

Europe can produce strawberries all year round, nearly 1.3 million tonnes in 2016, but most production diminishes in the winter. Early in the season, strawberries are expensive and sometimes not sufficiently ripe. At

the end of the season, the quality decreases. These moments are opportunities for other suppliers that are able to deliver a quality product.

Figure 5: Indicative availability calendar

	j	f	m	a	m	j	j	a	s	o	n	d
Netherlands												
Belgium												
United Kingdom												
Germany												
Poland												
Peru												
Jordan												
Ethiopia												
Egypt												
Morocco												
Italy												
Spain												
Turkey												

Tips:

Evaluate your position and potential competitors according to the supply planning of other producing countries. Try to focus on Europe when supply is low.

Keep yourself informed about current market conditions by maintaining good relations with buyers in Europe and follow news updates, for example on [Freshplaza](#).

Buyer requirements can be an obstacle for market entry

Regulations and compliance with buyer requirements pose a major obstacle for producers and exporters seeking to enter the European market. As a new supplier, you will find the cost of entrance to be high, which can be especially difficult if your business is small. The combination of strict MRLs, high quality, food safety certifications and additional social compliance make Europe suitable for exporters that are well-organised in all aspects.

Concentrated channels make retailers powerful buyers

Strawberries are a popular fruit that large retailers such as supermarkets are keen to offer during summer. The concentration in this channel, and thus the increasing volume marketed through large retailers, make these retailers powerful buyers. As a supplier to European retailers, you are not in a position to argue about the rules of the game.

Buyers tend to prefer long-term partnerships as a means of ensuring the supply and quality of products, but they can also switch easily to other suppliers if expectations are not met. Although there is a general preference for local strawberries, large retailers tend to go for a year-round supply. You can contribute to completing the

availability of strawberries, but you must be able to deliver a reliable and constantly high-quality product.

Tips:

Develop partnerships with experienced importers that can help you with accessing the larger retail channels.

Read the [Tips for doing business with European buyers](#) on the CBI market intelligence platform.

Product competition in soft fruit

Strawberries are the most popular product in the soft fruit segment with a steady annual growth. However, the market for strawberries grows much slower than some of the other soft fruits markets. In Spain, the largest strawberry producer in Europe, the production of strawberries is under pressure due to other upcoming soft fruit, such as raspberries and blueberries.

Consumers have more choices when purchasing soft fruit. Although there is more product competition, strawberries benefit from the same positive berry trend. Therefore, you can expect their consumption to continue to grow. You can give extra attention to your product by branding and differentiating the characteristics of your product.

Tips:

Storytelling (for example highlighting the origin and producer of your products), recipes, [novel packaging](#) and premium quality are aspects with which you can distinguish your products from the rest of the field. Take advantage of the perceived health benefits of strawberries and their reputation as a 'super fruit'.

6. Which trade channels can you use to put fresh strawberries on the European market?

Integration and a smaller number of relevant buyers

The strawberry industry is becoming increasingly integrated. Growers work in close cooperation with seed companies, plant growers and distributors, supplying retailers that demand a steady and year-round supply of strawberries. The companies in the supply chain are becoming [fewer and larger](#).

For companies that export strawberries to Europe, the number of relevant buyers is decreasing.

Processing as an alternative

Strawberry is a popular ingredient in dairy products, breakfast cereals, ice cream, drinks and jelly. Most of the primary processing (frozen, freeze dried, pulp, syrup) is done in producing countries with locally produced strawberries. [Countries that process a large amount](#) of their production are Morocco (70%) and Poland (64%). Poland has a very short season and lacks the infrastructure and larger-sized producers to supply the fresh market. Spain processes around 18%. For other producers in Europe, this is approximately 2 to 8%.

If you are not able to provide a stable and high-quality supply of strawberries, processing your product for

export can be a good alternative, for example frozen. Expect prices for processed strawberries to be lower than for fresh ones.

Tips:

Explore the [opportunities on the European markets for frozen strawberries](#) on the CBI market intelligence platform.

Make sure you have a suitable variety when using your product for processing.

The composition of market channels differs per region

The composition of market channels differs within Europe. Channels in northern countries, for example Germany, the United Kingdom, the Netherlands and Belgium, are strongly dominated by the supermarket channel. France and Spain go even beyond that with large hypermarkets, alongside smaller specialist shops. Countries in the Alpine region, for example Switzerland and Austria, are more favourably disposed towards small local shops.

For strawberries, it is often crucial to have a good importing partner to supply different retail channels. Importers or distributors differ in their relationships to the retail sector. Some are suppliers for private-label products, while others have their own brands or market the brands of specific producers (cooperation).

Tips:

Use databases such as [food-companies.com](#) to find potential buyers.

Find a European importer by presenting yourself at trade fairs such as the [Fruit Logistica](#) in Berlin and [Fruit Attraction](#) in Madrid.

Read the [CBI Tips for finding buyers in the European market for fresh fruit and vegetables](#).

7. What are the end-market prices for fresh strawberries?

Strawberry prices depend mainly on quality (variety/origin) and season (offer/demand). Trade [prices](#) for high-quality Dutch and Belgian strawberries are generally higher than for Spanish and Polish strawberries. Germany, France and Italy are in between.

There is a correlation between quality and price, but as an exporter you have to be aware that there is not always a direct relation between trade prices and supermarket prices.


Retail prices vary from 6 euros per kilo in high season (4 or 5 euros on promotion) to 12 euros per kilo at the end of the season.

Tip:


Check retail prices through the online shops or assortments of supermarket chains such as [Tesco](#), [Albert Heijn](#) ('aardbeien'), [Rewe](#) ('erdbeeren') or [Hipercor](#) ('fresas').

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