What is the demand for processed fruit and vegetables on the European market?

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European imports of processed fruit and vegetables grew steadily from 2015 to 2019. A considerable share of imports comes from developing countries. Germany, the Netherlands, France and the United Kingdom are leading in imports and offer the best opportunities. COVID-19 has not decreased demand but has had an impact on the relative sizes of different market channels. This year, the products with the most potential are cashew nuts, frozen fruit (especially berries), canned tropical fruit, peanuts and tropical fruit juices and purees. Consumers feel that these products contribute to a healthy lifestyle, which is a strong factor in their expected continued growth for the next few years.

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1. What makes Europe an interesting market for processed fruit and vegetables?

Europe is the largest importer of processed fruit and vegetables in the world, absorbing more than 40% of the global supplies. Every year between 2015 and 2019, European imports of processed fruit and vegetables increased in volume. In 2019, the import volume showed a temporary decrease but it seems that imports will pick up in 2020, according to the available data for the first half of the year.

Around 30% of the European trade in processed fruit and vegetables comes from developing countries. In addition, most intra-European trade is made of re-exports of processed fruit and vegetables originally coming from developing countries. In the next five years, European imports of processed fruit and vegetable are expected to increase at an annual growth rate of 2% to 3%, depending on product categories.

Between 2015 and 2019, European imports of processed fruit and vegetables grew every year by 1% in value and 2.4% in volume, reaching €37.5 billion and 24 million tonnes in 2019, a very slight reduction of -0.3% in import quantities compared to 2018. Approximately 90% of all processed fruit and vegetables imported from outside the European Union comes from developing countries. European imports from developing countries peaked in 2019 at a value of €11 billion and 6.4 million tonnes.

Imports of edible nuts and frozen fruit expected to grow the most

Imports of edible nuts and frozen fruit are expected to expand the most, driven by the healthy snacking trend (nuts) and demand for smoothies and other healthier food (frozen fruit). Import of fruit juices is likely to show the least growth because of a desired decreased sugar intake by European consumers. Europe’s import growth is forecasted to remain lower than that in other regions worldwide, such as South and South East Asia, where economic growth projections are higher than in Europe and markets are expanding more rapidly.

Though in volume the fourth category, in terms of value edible nuts is the largest category imports. With a value of €9.8 billion, it accounts for a quarter of total imports. This significant share is explained by the relatively high value per kilogram of edible nuts compared to other products. However, in terms of quantity, the largest import category is fruit and vegetable juices as shown in Figure 2 below.
Fruit and vegetable juices make the largest product group in volume with a 31% share of European imports, followed closely by canned and preserved fruit and vegetables (29%). Frozen fruit and vegetables (20%) have the third-largest import share, followed by edible nuts (12%), dried fruit and vegetables (5%) and jams, marmalades and purees (3%). Industry experts forecast moderate growth for European import values of processed fruit and vegetables in the coming years.

In this sector, only fruit juices and dried fruit imports declined in 2019, due to increased consumer perception that concentrated fruit products as rich in sugar, which is in line with the general sugar consumption decline in Europe. On the other hand, import and consumption of edible nuts and frozen fruit are growing significantly. Increased consumption of nuts is influenced by a consumer trend towards healthy snacking. The increased imports of frozen fruit (especially berries) is driven by consumption of smoothies and other products, such as fruit preparations, fruit fillings, freeze-dried products and jams.

The positive influence of COVID-19 on consumption

The COVID-19 pandemic in 2020 did not negatively influence European sourcing of processed fruit and vegetables. On the contrary, European imports of processed fruit and vegetables were higher during the first half of the year compared to the same period in 2019. Consumption of shelf-stable food, including processed fruit and vegetables, was very high during the first months of the COVID-19 outbreak, March and April.

Consumption of frozen and canned foods increased during 2020. This was a surprising switch from buying fresh products to shelf-stable food. Producers of fresh products have had many order cancellations, forcing them to redirect products to processing. Price, shelf life and innovation were key drivers behind the increased consumption of processed fruit and vegetables in 2020. Products with properties that are beneficial to the immune system were in high demand. These products include nuts (such as cashews) and beverages enhanced with vitamins, minerals or ginger juice.

Food service sales decreased significantly due to frequent lockdowns and restrictions across Europe. On the other hand, retail and online sales got a boost. In order to stay safe, many people started buying more food and preparing it at home rather than eating in restaurants. For example, between February (when the pandemic started to affect Europe) and June 2020, retail food sales increased by 11% in the UK, 15.2% in Spain and 10% in the Netherlands compared to the same period in 2019. Online food sales increased significantly across Europe during the lockdown, as it became the safest way of shopping.

Europe is not self-sufficient in processed fruit and vegetables

European countries do not have suitable climatic conditions to cultivate tropical fruit and vegetables, so they depend heavily on imports from tropical and semi-tropical countries. Only a few types of processed fruit and vegetables see any significant production in Europe. The strongest import dependency is in dried fruit and edible nuts, where the share of domestic production in total consumption is smaller than 10%.

Table 1: Trade balance of the most produced European processed fruit and vegetables and edible nuts

<table>
<thead>
<tr>
<th>Product</th>
<th>Leading European producers</th>
<th>Import volume 2019 in thousand tonnes</th>
<th>Leading non-EU suppliers</th>
<th>Export volume 2019 in thousand tonnes</th>
<th>Trade balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Origin</td>
<td>Code</td>
<td>Destinations</td>
<td>Export</td>
<td>Import</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-------------------------</td>
<td>------</td>
<td>---------------------------------------------------</td>
<td>--------</td>
<td>--------</td>
</tr>
<tr>
<td>Concentrated apple juice</td>
<td>Poland</td>
<td>643</td>
<td>China, Moldova, Ukraine, Turkey, Serbia</td>
<td>627</td>
<td>-16</td>
</tr>
<tr>
<td>Canned pears</td>
<td>Italy, Spain</td>
<td>82</td>
<td>China, South Africa, Argentina</td>
<td>55</td>
<td>-27</td>
</tr>
<tr>
<td>Tomato puree</td>
<td>Italy, Spain, Portugal</td>
<td>1188</td>
<td>China, United States, Ukraine</td>
<td>1577</td>
<td>389</td>
</tr>
<tr>
<td>Tomatoes preserved as whole or in pieces</td>
<td>Italy</td>
<td>1121</td>
<td>Turkey</td>
<td>1707</td>
<td>586</td>
</tr>
<tr>
<td>Canned peaches and nectarines</td>
<td>Greece</td>
<td>245</td>
<td>South Africa, China</td>
<td>381</td>
<td>136</td>
</tr>
<tr>
<td>Canned apricots</td>
<td>Greece, Spain</td>
<td>86</td>
<td>Morocco, South Africa, China</td>
<td>67</td>
<td>-19</td>
</tr>
<tr>
<td>Canned beans and pulses</td>
<td>Italy</td>
<td>667</td>
<td>Kenya, Lebanon, Turkey</td>
<td>828</td>
<td>161</td>
</tr>
<tr>
<td>Table olives</td>
<td>Spain, Greece, Italy</td>
<td>520</td>
<td>Morocco, Turkey, Egypt</td>
<td>797</td>
<td>277</td>
</tr>
<tr>
<td>Frozen vegetables</td>
<td>Belgium</td>
<td>3412</td>
<td>China</td>
<td>3546</td>
<td>134</td>
</tr>
<tr>
<td>Frozen berries</td>
<td>Poland</td>
<td>717</td>
<td>Serbia, Egypt, Morocco</td>
<td>433</td>
<td>-284</td>
</tr>
<tr>
<td>Frozen sour cherries</td>
<td>Hungary, Poland</td>
<td>92</td>
<td>Serbia</td>
<td>91</td>
<td>-1</td>
</tr>
<tr>
<td>---------------------</td>
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<td>----</td>
<td>----</td>
</tr>
<tr>
<td>Prunes</td>
<td>France</td>
<td>69</td>
<td>United States, Chile, Argentina</td>
<td>39</td>
<td>-30</td>
</tr>
<tr>
<td>Hazelnuts</td>
<td>Italy</td>
<td>200</td>
<td>Turkey</td>
<td>54</td>
<td>-146</td>
</tr>
<tr>
<td>Walnuts</td>
<td>France</td>
<td>217</td>
<td>United States, Chile</td>
<td>73</td>
<td>-144</td>
</tr>
</tbody>
</table>

Source: Eurostat, ITC Trade Map and industry sources

Still, as shown in Table 1, none of these are produced in sufficient volumes to meet European demand. Also, Europe’s domestic fruit and vegetables processing does not show any clear tendency towards increasing volumes. Therefore, offer from non-European suppliers is important to satisfy European market needs.

New suppliers from developing countries must be aware of the strong competition from the existing countries of origin. For example, apple juice is currently imported in large quantities from China, frozen fruit from Serbia and Egypt, prunes from the United States, Chile and Argentina and walnuts from the United States and Chile. If you produce some of these listed products you should make your offer unique and different from other origins in order to add value to your offer. Check some of the examples on how to be authentic in the CBI study on doing business with European buyers of processed fruit and vegetables.

Opportunities in products not produced in Europe

Products not produced in Europe, or those produced in insufficient volumes, provide the best opportunities for you. Table 2 below shows the annual growth of import values for the top-10 processed fruit and vegetables (6-digit HS codes) originating outside the European Union in the 2015–2019 period. Currently, the best opportunities for new suppliers from developing countries can be found in large volume products such as cashew nuts, frozen fruit and tropical fruit juices.

<p>| Table 2: Average annual value growth of Europe’s processed fruit and vegetable imports from non-EU countries 2015–2019 |
|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|
| Processed fruit and vegetables | 0% | 3% | 0% | 1% | 36272 |</p>
<table>
<thead>
<tr>
<th>Product</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelled almonds</td>
<td>-15%</td>
<td>-15%</td>
<td>2%</td>
<td>16%</td>
<td>2536</td>
<td>7.1%</td>
</tr>
<tr>
<td>Frozen fruit</td>
<td>4%</td>
<td>12%</td>
<td>4%</td>
<td>6%</td>
<td>2336</td>
<td>3.4%</td>
</tr>
<tr>
<td>Frozen vegetables</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
<td>0%</td>
<td>1659</td>
<td>4.6%</td>
</tr>
<tr>
<td>Shelled cashew nuts</td>
<td>14%</td>
<td>28%</td>
<td>-8%</td>
<td>-4%</td>
<td>1425</td>
<td>4.0%</td>
</tr>
<tr>
<td>Concentrated orange juice</td>
<td>1%</td>
<td>-16%</td>
<td>8%</td>
<td>-6%</td>
<td>1363</td>
<td>3.9%</td>
</tr>
<tr>
<td>Orange juice</td>
<td>11%</td>
<td>-4%</td>
<td>8%</td>
<td>-4%</td>
<td>1398</td>
<td>3.8%</td>
</tr>
<tr>
<td>Shelled hazelnuts</td>
<td>-16%</td>
<td>-13%</td>
<td>-9%</td>
<td>9%</td>
<td>1134</td>
<td>3.2%</td>
</tr>
<tr>
<td>Canned and preserved vegetables</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>1127</td>
<td>3.1%</td>
</tr>
<tr>
<td>Canned and preserved fruit</td>
<td>10%</td>
<td>7%</td>
<td>5%</td>
<td>4%</td>
<td>1112</td>
<td>3.1%</td>
</tr>
<tr>
<td>Jams, jellies, marmalades, purees</td>
<td>3%</td>
<td>5%</td>
<td>1%</td>
<td>-6%</td>
<td>1297</td>
<td>2.8%</td>
</tr>
</tbody>
</table>

Source: Trade Map

Most of the top imported products showed a positive import growth in value, except for cashew nuts, orange juice and jams. There are different reasons behind the drop in import values for these products, namely:

- **Cashew nuts**: Prices of cashew nuts collapsed in 2018, and recovery extended into 2019, which explains the decrease in import values. However, import quantities are constantly increasing, making cashew nuts one of the most attractive products on the European market. Cashew nuts also continued a strong increase in import quantity during the first half of 2020. At the same time, prices continue to fall and direct import from Africa is increasing.
- **Orange Juice**: Import volumes of concentrated orange juices have been constantly declining in the last five years. The first reason behind it is a general drop in fruit juice consumption in Europe. This decline can be largely attributed to consumer concern about sugar content in juices. Another reason is that not-from-concentrate orange juice has become more popular thanks to consumer awareness. Imports of fresh oranges are also growing as many retailers in Europe now sell freshly squeezed orange juice.
- **Jams, marmalades and purees**: This rather complex category has several different products which all have different import dynamics. Trade in and consumption of jams, marmalades and fruit spreads generally
decreased in Europe due to concerns about sugar intake, similar to the case of fruit juices. Also, consumers are changing habits and switching from a traditional breakfast (often containing jams) to new options such as smoothies, breakfast cereals etc. On the other hand, imports of fruit purees, used as ingredients in the beverage industry continued to increase.

The imported products shown in Table 1 do not provide equal opportunities for you as a supplier of those products. Competition can be very strong. In some cases, one country alone dominates supply to Europe. For example, the United States of America dominate the almond supply, Turkey leads the supply of hazelnuts, and Brazil practically controls orange juice production. If you are offering those products you may have difficulties competing with the dominant suppliers. Other challenges arise in frozen vegetables, canned vegetables and jams, which are mostly traded within Europe and the share of imports from outside the European Union is not very high.

Currently, the best opportunities for new suppliers from developing countries can be found in large-volume products, such as cashew nuts, frozen fruit and tropical fruit juices. Products imported in relatively smaller volumes, including pistachios, brazil nuts, macadamia nuts, dried mushrooms and dried tropical fruit, also offer opportunities for new suppliers from developing countries. Those products offer fewer opportunities in terms of volume but they have a relatively high price, which means more profit. Coconut products such as desiccated coconuts, coconut milk, coconut oil and coconut water also offer specific opportunities.

On the other hand, particular market circumstances may offer limited opportunities to new suppliers of other products. For example, the decreasing demand for orange or apple juice and the sufficient or excessive supply of several canned vegetable or fruit products in Europe. The third section of this study elaborates further on which products provide the most opportunities (see tables 2–4).

Imports from developing countries are expected to grow slowly to moderately in the coming years. This will strongly depend on the development of star performers like cashew nuts, or underperformers like concentrated orange juice.

**Successful suppliers Brazil and Turkey leading the way**

Brazil is the leading supplier of processed fruit and vegetables to Europe in terms of volume, mostly because of its orange juice exports. Turkey comes second, as the leading European supplier of hazelnuts, hazelnut paste, dried grapes and dried apricots. However, in terms of value the United States is Europe’s top supplier thanks to the high value of exported products such as almonds, pistachios and walnuts. China holds the third position in volume and the fourth in value with dried and frozen mushrooms, pine nuts and preserved asparagus as the leading products.

To be successful on the European market, you should constantly monitor the offer of the leading supplying countries and compare yourself with successful exporters. Keep in mind that it would be challenging to be price-competitive with the leading producers so find your own unique selling proposition. You can find many examples on how to be authentic in the CBI study on *Doing Business with European Buyers* of processed fruit and vegetables.

Other developing countries stand out in different product groups. Table 2 below breaks down the leading suppliers per product group.

**Table 2: Leading developing country suppliers of processed fruit and vegetables to Europe**

<table>
<thead>
<tr>
<th>Product group</th>
<th>Top 5 developing country suppliers to Europe</th>
<th>Top products per product group</th>
</tr>
</thead>
</table>


| **Canned and preserved fruit and vegetables** | China  
Turkey  
Peru  
India  
Thailand | Canned tomato products  
Canned pineapples  
Table olives  
Canned asparagus  
Pickled cucumbers  
Canned palm hearts |
|---|---|---|
| **Dried fruit and vegetables** | Turkey  
China  
Chile  
Tunisia  
South Africa  
Philippines | Dried grapes  
Dried apricots  
Dried mushrooms  
Dried vegetables  
Dates  
Desiccated coconuts  
Dried mangoes |
| **Frozen fruit and vegetables** | Serbia  
China  
Egypt  
Morocco  
Ukraine | Frozen raspberries  
Frozen strawberries  
Frozen blackberries  
Frozen mushrooms |
| **Fruit and vegetable juices** | Brazil  
Turkey  
Costa Rica  
Argentina  
Mexico | Orange juice  
Apple juice  
Pineapple juice  
Pomegranate juice  
Sour cherry juice  
Single citrus juices  
Tropical juices and purees |
| **Jams, pastes and purees** | Turkey  
Serbia  
India  
South Africa  
Chile | Hazelnut paste  
Berry purees  
Apple puree  
Plum puree  
Mango puree |
| **Edible nuts** | Turkey  
Vietnam  
Argentina  
India  
China | Almonds  
Walnuts  
Hazelnuts  
Pistachios  
Cashew nuts  
Groundnuts (peanuts)  
Pine nuts |
**Tips:**

Keep up-to-date with market developments by regularly checking the European Juice Market Reports, INC Statistical Yearbook and PROFEL statistics.

Compare your products and company to competitors from other supplying countries. Use the ITC Trade Map to find exporters per country and compare market segments, prices, quality and target countries.

Read more about the decline in sugar consumption in Europe affecting the fruit juices sector in our CBI trends study.

Explore opportunities for individual products by reading our product specific studies.

Invest in digitisation and online marketing to better cope with the COVID-19 pandemic. You can find several practical tips in CBI study on responding to COVID-19 in processed fruit and vegetables sector.

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2. **Which European markets offer most opportunities for processed fruit and vegetables?**

Germany and the Netherlands are Europe’s main importers of processed fruit and vegetables, making them interesting focus markets. Both markets have the largest shares of imports from developing countries. France, the United Kingdom, Belgium and Italy are other promising leading markets with a relatively large share of imports from developing countries.

**Netherlands: the largest importer from developing countries**

The Netherlands is in fact the largest European importer of processed fruit and vegetables from developing countries, which make up 56% of all Dutch imports of processed fruit and vegetables. The Netherlands is also the leading European re-exporter, with orange juice, cashew nuts and peanuts being the top re-exported products. Germany is the main destination for Dutch processed fruit and vegetable re-exports.

It may seem attractive to sell directly to German end-recipients instead of going through Dutch importers, but many of those final recipients import smaller quantities while direct importers purchase full containers. Because of that, many final recipients actually do not import outside Europe.

Fruit juices is the largest category in processed fruit and vegetables imported into the Netherlands. Within the fruit juices category, the top imported product is concentrated orange juice from Brazil. Still, fruit juices do not provide many opportunities for new suppliers because Dutch fruit juice consumption has been shrinking every year since 2014. However, some opportunities can be found in the supply of superfruit ingredients, such as frozen fruit and purees, as well as vegetables for smoothies, considering the Netherlands is also the largest European importer of canned tropical fruit and frozen tropical fruit.

The Netherlands is the largest European importer of shelled groundnuts (peanuts), and the second largest market for cashew nuts which opens opportunities for developing country suppliers. However, take into account that the Netherlands is mainly a transit country for imported nuts that have other European countries as their final destination. Pecan nuts also offer some opportunities for export, since the Netherlands is the largest European market for pecan nuts, although the market is very much dominated by supply from the United States of America. Dutch pecan nut consumption passed 4 thousand tonnes in 2018, equivalent to 245 g per capita.

Dried grapes may also offer opportunities for suppliers from developing countries. The Netherlands has the
largest per capita consumption of 2.3 kg in 2018.

Examples of emerging suppliers and products gaining market share in the Netherlands include:

- Turkey (pickled cucumbers)
- Philippines (coconut water)
- Peru (passion fruit juice)
- Egypt (frozen strawberries)
- Kenya (canned beans and canned pineapples)
- Morocco (frozen strawberries)
- Ukraine (apple juice)
- Lebanon (canned beans)
- Costa Rica (canned tropical fruit)
- Namibia (dried carrots)

Adopting sustainable and ethical production practices also provides additional opportunities for new suppliers from developing countries. The Netherlands is an important European market for retail sales of fair-trade products. According to the International Trade Centre, companies in Germany and the Netherlands were the most committed to creating corporate sustainable sourcing commitments among 550 retailers surveyed in Europe.

**Germany is the largest market in Europe for processed fruit and vegetables and edible nuts**

Germany is by far Europe’s largest importer of processed fruit and vegetables with a value of €8 billion in 2019, which means 21% of all European imports in this category. More than 60% of Germany’s imports come from other European countries, while direct imports from developing countries account for less than 30%. In import value, edible nuts are the largest product group among German imports, followed by canned fruit and vegetables. In import quantity, canned fruit is the largest product group, followed by fruit juices and frozen fruit and vegetables.

Within the edible nuts category, cashew nut kernels in particular offer good opportunities for suppliers from developing countries, as Germany is the largest European importer and market for this product. Imports of canned fruit and vegetables to Germany mainly come from other European countries. In this group, pickled cucumber, canned asparagus, capsicums (chili and sweet), table olives and canned pineapples offer the best opportunities for suppliers from developing country.

Germany is also Europe’s leading fruit juice market, but it is a market under pressure as consumption has been declining since 2003. Still, healthy foods offer some opportunities, especially the top performers: not-from-concentrate and organic juices. Ingredients for smoothies, purees and frozen fruit made of berries or tropical fruit, also provide solid opportunities for suppliers from developing countries.

The leading developing countries supplying processed fruit and vegetables to Germany are Turkey and Brazil. Hazelnuts and dried grapes are Turkey’s main exports to Germany in the processed food and vegetables sector. Orange juice is Brazil’s leading product exported to Germany in this sector.

As described in our trends study, German suppliers are searching for new sourcing origins to ensure more sustainable supplies. Examples of emerging suppliers to Germany include:

- Egypt (frozen strawberries, groundnuts and dried onion)
- Ukraine (apple juice, frozen fruit and walnuts)
- Morocco (frozen strawberries and almonds)
- Uzbekistan (dried grapes)
- Azerbaijan (hazelnuts)
- Afghanistan (almonds)
Lebanon (canned beans)  
Syria (almonds)

Sustainability is also trending strongly in Germany. According to the ITC's sustainability trend reports, Germany is the second-biggest market for fair-trade products globally, and the biggest market for organic products in Europe. German residents also recycle the most packaging waste in Europe at 160 kg per capita annually. Beyond certificates, suppliers that reduce their environmental impact must work in a sustainable way, and innovate in agricultural and food processing technology will have an advantage in Germany as well as other European markets.

**United Kingdom**

The United Kingdom is the leading European importer of dried fruit and the fourth-largest importer of processed fruit and vegetables in the European Union, thanks to an annual import growth rate of 3%. The leading developing country supplying to the United Kingdom in this sector is Turkey, supplying mostly dried grapes and dried apricots.

The United Kingdom is the largest European consumer of Brazil nuts, consuming 4.2 thousand tonnes in 2018, and the leading European importer of dried grapes (96 thousand tonnes in 2019). Berries and tropical fruit processed in different ways — frozen, purees or juices — provide good opportunities for suppliers from developing countries, because the United Kingdom is the largest European market for smoothies. Total consumption of smoothies in the United Kingdom is estimated at approximately 70 thousand litres. The United Kingdom is also the largest European market for coconut water.

Examples of emerging developing countries exporting to the United Kingdom include:

- Peru (frozen tropical fruit and mango puree)  
- Kenya (canned pineapples)  
- Ecuador (frozen broccoli)  
- Pakistan (pickled cucumbers)  
- Palestine and Jordan (dates)  
- Ukraine (preserved tomatoes)

The impact of Brexit (the United Kingdom leaving the European Union) to the sourcing of processed fruit and vegetables is uncertain. However, it is not expected that any big changes will influence the import from the United Kingdom of those products. However, as the situation is still fluid and insecure, you should keep a close watch on Brexit developments.

As the world’s largest market for fair-trade products, comprising total annual retail sales of £804 in 2019, the United Kingdom also provides good opportunities for fair-trade certified suppliers. In June 2020 Kantar assessed the impact of the COVID pandemic on Fairtrade sales. Certified Fairtrade products were +23% in terms of value.

**Italy**

Italy is the sixth-largest European importer of processed fruit and vegetables, but somewhat different from other top importers because it is also a significant producer and processor of fruit and vegetables. The leading developing country supplying to Italy in this segment is Turkey, mostly exporting shelled hazelnuts. Most of the Turkish hazelnut supply to Italy is aimed at the international confectionary companies such as Ferrero.

Italy is the largest European market and processor of hazelnuts, chestnuts, table olives and processed tomatoes. Consumption of pine nuts for the production of pesto is also very high in Italy, even though pine nuts are frequently substituted with other, relatively cheaper nuts, such as almonds and cashews. Organic and vegan products show very high market growth in Italy.

Examples of emerging developing countries gaining market share in Italy include:

- Lebanon (canned beans)  
- Syria (almonds)
• Chile (canned tomatoes and hazelnuts Italy’s Ferrero direct investment)
• Egypt (frozen artichokes and frozen strawberries)
• Morocco (table olives)
• Tunisia (dried tomatoes)
• Azerbaijan (hazelnuts)
• India (dried onions)
• Costa Rica (canned tropical fruit)

**Tips:**

Study your options in the relatively large import markets in Germany, the Netherlands, France and the United Kingdom. The combination of market size and the strong performance of developing countries makes these especially interesting markets.

Study examples of emerging developing countries that are gaining market share on the European market provided in this section. If you are producing some of the mentioned products, compare your assortment with competitors, then try to implement similar strategies to take your product to the European market.

Invest in more sustainable production processes to increase your opportunities in the European market. Read more about sustainability trends in our [trends report](#).

**France**

French imports of processed fruit and vegetables have grown at an annual rate of 2% in quantity over the last five years, placing France third among importers of processed fruit and vegetables in Europe. France’s share of imports from developing countries is the smallest the top importing countries in Europe, namely 21%, but it is growing. The leading developing countries that export to France in terms of value in this segment are Turkey and Brazil, supplying mostly shelled hazelnuts (Turkey) and orange juice (Brazil).

The fruit juices sector offers opportunities for suppliers of not-from-concentrate pineapple and grapefruit juices. France is the largest European importer of these products. In the edible nuts category, France is the largest European consumer of walnuts, but a significant share of them are domestically produced. Within the dried fruits category, specific opportunities can be found in the supply of dates, dried apricots and dried figs, since France is the largest European importer and consumer of these products. Also, France is the largest European importer of table olives.

Examples of emerging developing countries exporting to France include:

• Morocco (table olives)
• Kenya (canned green beans and canned pineapples)
• Egypt (frozen strawberries)
• Madagascar (canned green beans)
• Indonesia (canned pineapples)
• Ukraine (walnuts)
• Togo (groundnuts in shell)

**Belgium**

Belgium is the fifth-largest European importer of processed fruit and vegetables and an important re-exporter to other European countries. Belgium is specifically strong in the trade of frozen fruit and vegetables. The leading developing country exporting to Belgium in this segment is Brazil with orange juices, followed by Turkey with dried grapes and table olives. Belgium is also the largest European importer of canned mushrooms and a large importer of frozen and canned...
vegetables. Belgian imports of edible nuts, such as cashews and Brazil nuts, is also significant although consumption is not very high compared to other European importers. Another striking characteristic is the large import value of pistachios. Belgium is the second-largest European importer of pistachios, after Germany.

Examples of emerging developing countries gaining market share in Belgium include:

- Morocco (table olives)
- Serbia (frozen sweetcorn)
- Egypt (frozen artichokes)
- Mexico (frozen tropical fruit)
- Cameroon (frozen peas)
- Togo, Ivory Coast, Burkina Faso, Benin and Ghana (cashew nuts)
- Iran and Palestine (dates)

**Other hidden potential markets**

Only two European countries can be considered medium-sized importers of fruit and vegetables: Spain and Poland. Edible nuts, especially almonds, walnuts and pistachios are the top Spanish imports in this sector, followed by frozen vegetables. Poland is a strong importer of preserved tomatoes, groundnuts and frozen fruits. Both countries also most often produce the same products they import, so they use imports to supplement domestic production. Spain, for instance, is the largest European producer of almonds and table olives but also a very big re-exporter of these products. Poland is, for example, also a strong producer of frozen fruit.

Austria also provides opportunities for developing countries exporting processed fruit and vegetables, being the eighth largest European importer in this sector. Although the Austrian population is small compared to other European markets, Austria has a very well-developed fruit juice processing industry, which provides opportunities for developing country to supply the raw materials like concentrated juices, purees and frozen fruit.

As for other promising markets, Central and Eastern Europe have been growing the most. Among the countries in these regions, Romania showed the strongest increase in imports, on average 10% annually between 2015 and 2019. Romanian imports of processed fruit and vegetables increased from 246 thousand tonnes in 2015 to 355 thousand tonnes in 2019. Despite importing much smaller volumes than the top European importers, markets in Central and Eastern Europe are substantial enough to provide direct export opportunities for exporters from developing countries.

**European competition is limited**

Europe’s production of processed fruit and vegetables is limited, although some countries produce substantial volumes of certain products. The largest European processors of fruit and vegetables are Spain, Italy, France, Greece and Poland.

Spain is the leading European supplier of table olives, but it also produces and exports other products, such as canned fruit, canned vegetables, frozen vegetables, processed tomatoes, almonds, citrus juices, jams and purees.

Italy is the largest European producer and exporter of processed tomato products, such as canned tomatoes, tomatoes purees, pastes and juice, Italy is also a large producer of hazelnuts, canned beans, table olives, dried figs and Mediterranean pine nuts. Italy is also the largest exporter of not-from-concentrate grape juice in the world.

France is the leading producer of canned vegetables in Europe, mostly because it is home to Bonduelle, the French-owned leading supplier of canned products in Europe. France is also a significant producer and exporter of walnuts, prunes, jams, fruit juices and other products. For example, France is the largest European processor of imported pineapple juice. France also has a very developed frozen food offer. For example, the company
Picard Surgelés, a producer and retail distribution of frozen products, has more than 900 stores in France.

Greece is the leading supplier of canned peaches and canned apricots in the world. Greece is also the second-largest European producer of table olives and a leading supplier of dried grapes (currants) and dried figs. Poland is the leading European producer of apple juice and frozen strawberries. Other important suppliers include Belgium (frozen vegetables), Hungary (canned and frozen sour cherries), Portugal (tomato puree) and Bulgaria (dried sweetcorn).

**Tips:**

Explore opportunities in Europe’s medium-sized and smaller markets, especially growing markets like countries in Central and Eastern Europe.

Visit European trade fairs to find trading partners. Start with the leading trade fairs in Europe: Anuga in Germany, Sial in Paris and Biofach for the organic market segment and also in Germany. Another fair that might also yield potential trading partners is Fi Europe, which is dedicated to food ingredients.

Participate in online initiatives trade event organisers have put forward during the COVID-19 pandemic, such as the Fi Connect matchmaking platform or PLMA online and online events such as SIAL Insights and ANUGA Horizon 2050. Find opportunities in contacting large European food processors to check if they are importing ingredients directly or they are rather supplied through importers.

3. Which products from developing countries have the most potential in the European processed fruit and vegetables market?

The products from developing countries with the most potential on the European market are cashew nuts, frozen fruit, tropical juices and purees, groundnuts (peanuts), dates and canned tropical fruit. The strong performance these products have shown since 2014 is expected to continue in the coming years, since their nutritional benefits meet the current consumer demand for healthy foods. It must be noted that aside from the 6 selected products with the highest import value to Europe, there are many more products that can provide good opportunities for suppliers from developing countries. In order to learn more about those products please check the annex of this study.

**Cashew nuts**

European cashew nut imports are growing, driven mostly by the consumer trend towards healthier foods. Germany, the United Kingdom, France, the Netherlands, Italy and Spain are the largest European markets for cashew nuts. Smaller but growing markets in Central and Eastern Europe also offer opportunities, especially for new suppliers.

Within the edible nuts category, cashew nuts are the second most imported product in Europe by value, after almonds. Also, in the whole category of processed fruit and vegetables and edible nuts, cashew nuts are the most imported product in terms of value, after almonds and frozen vegetables. All cashew nuts are sourced from developing countries.

The European market traditionally imported most cashew nuts from Vietnam and India. Although African countries are the largest producers of raw in-shell cashew nuts, they still do not have sufficient processing capacities to supply Europe directly. Instead they export in-shell cashew nuts to Vietnam and India for further processing. However, other developing countries have started investing in processing facilities and gaining
Emerging suppliers of cashew kernels include Ivory Coast, Burkina Faso, Mozambique, Honduras, Ghana, Benin, Indonesia and Togo.

Cashew nuts in Europe are mostly consumed as snacks but their use as an ingredient is also growing. Cashew nuts are increasingly used in various healthy food and functional food products, such as breakfast cereals, cashew nut butter and chocolate products.

The sustainable production of cashew nuts is gaining importance in Europe. Several large traders joined the Sustainable Nut Initiative to stimulate traceability and sustainability in the supply chain of cashew nuts. Also, several international projects and organisations are supporting processing and export of cashew nuts from Africa such as African Cashew Alliance (ACA), ComCashew and CBI projects in West Africa.

Tip:
Read more about the European market potential in the CBI studies on frozen berries and frozen tropical fruit.

Tropical fruit juices and purees
Europe is a large and growing market for tropical fruit juices. The most imported tropical fruit juice in Europe is pineapple juice, of which Europe imports more than 50%. Exporting tropical juice ingredients, such as concentrated or frozen purees, provides good opportunities for developing country suppliers. The Netherlands, Germany, France and United Kingdom offer good opportunities for suppliers of tropical fruit juices and purees from developing countries.

The leading countries supplying tropical juice to Europe are Costa Rica (pineapple juice), Thailand (pineapple juice), Brazil (guava and acerola) and Peru (passion fruit). Aside from juices, tropical fruit purees are also a large category, increasingly used in the beverage and baby food industry. A highly demanded product in this category is banana puree which is increasingly used in the production of smoothies as well as in the baby food industry. The leading European supplier of banana puree to Europe is Costa Rica, followed by Ecuador, Colombia and Guatemala.

Mango puree is another product from this category sourced in significant quantities, with India as the dominant supplier. Examples of other tropical puree suppliers include Brazil (guava puree, acai berry and acerola puree), Peru (passion fruit puree), Colombia (guava puree), Ecuador (passion fruit puree) and Mexico.

Developing new products, obtaining organic certification and adopting food safety and social responsibility standards can provide strong advantages to suppliers willing to enter the European market. For tropical fruit purees, opportunities can also be found in the baby fruit industry. However, keep in mind that the baby food industry is very demanding and increasingly requests organic certified products. In February 2020 new European infant food legislation was implemented that introduced new rules on composition, labelling and communication to consumers.

Tip:
Read more about potential opportunities on the European market in the CBI studies on tropical fruit purees, mango puree and pineapple juice studies.
Groundnuts (Peanuts)
Europeans consume up to 700 thousand tonnes of peanuts, also known as groundnuts. The largest European importers of groundnuts are the Netherlands, Germany and the United Kingdom. Germany is the largest consumer market with more than 170 thousand tonnes. Most peanuts reach European markets through the Netherlands, the largest re-exporter, packer and processor of peanuts in Europe. There are further market opportunities for peanuts in the growing markets of Central and Eastern Europe.

New suppliers from developing countries must be able to compete with the established offer from Argentina, the United States and China. Food safety certification supported with frequent laboratory tests and joined with corporate social responsibility (CSR) standards can also provide a great advantage for new suppliers to European markets.

Other large suppliers include Nicaragua, Brazil and Egypt. New, emerging suppliers include India, Vietnam, Togo, Bolivia, Cameroon and Senegal.

Tip:
Read more about the European market potential in the CBI groundnut study.

Dates
The European demand for dates is increasing. In 2019, the European import of dates reached 160 thousand tonnes. Dates are particularly popular for their sweetness and consumed as a snack as a natural source of energy. Dates are increasingly used as a sugar substitute, as an ingredient in fruit bars and as a cooking ingredient. France is the largest European market, importing 43 thousand tonnes in 2019, followed by Germany, the United Kingdom, Italy and the Netherlands.

European countries do not produce dates and most of them are imported from developing countries. Suppliers from emerging origins must be able to compete with Tunisia and Algeria as the leading suppliers to Europe. The most famous date varieties in Europe are Medjool and Deglet Nour dates but other tasty varieties are increasingly imported from Iran, Pakistan and Saudi Arabia.

Tip:
Read more about the European market potential in the CBI dates study.

Canned tropical fruit
Accounting for 45% of the world’s imports, Europe is the largest market for canned and preserved fruit and vegetables in the world. Import volumes of canned fruit and vegetables produced in Europe are stable, but imports of tropical and exotic products are growing. Large importing and consuming countries such as Germany, France, the United Kingdom and the Netherlands offer the most opportunities for exporters from developing countries. Natural, low-sugar and organic products are the main market drivers.

Canned pineapples are the largest product category in this group, with Thailand as the leading European supplier followed by Philippines, Indonesia and Kenya. Supplying countries of other products from this category include India (canned mangoes) and China (canned lychees, water chestnuts and sweet preserved ginger).
Please note that the European market for canned tropical fruit is retail oriented and dominated by a relatively small number of suppliers. Also, the range of products is very limited, with canned pineapples accounting for more than 90% of the whole product category. The best opportunities for new suppliers lie in private label products and ethnic supermarkets.

**Tip:**
Read more about the European market in the CBI canned fruit and vegetables.

### Other products
Other products that have also contributed to the growth of Europe’s processed fruit and vegetables imports include walnuts, table dates, dried grapes, pistachios, table olives, dried tropical fruit, desiccated coconuts, pickled vegetables, citrus juices, dried vegetables, pine nuts, pecans and other exotic nuts. These products were not among the top six most promising products, but they are worth looking into.

### Shelled walnuts
Europe is the largest walnut importer in the world, accounting for almost half of global imports. Driven by the consumer demand towards healthy foods, European walnut imports are growing. Walnuts are marketed as beneficial to brain function and rich in omega-3 fatty acids. In Europe, Italy, Germany and Spain offer exporters the most opportunities for suppliers from developing countries. Introducing light kernel varieties, obtaining food safety certifications and following CSR standards can offer strong advantages over competitors.

Chile, Moldova, Ukraine, China, India, Uzbekistan, Kyrgyzstan and Turkey are the leading developing countries to supply walnuts to Europe. However, Chile and the United States largely dominate Europe’s imports, limiting opportunities for new suppliers. France also produces significant volumes of walnuts.

For detailed analyses of more products with high potential in the European market, see the statistics annex of this study. Table 1 in the annex provides details for all products whose European import volume is greater than 1% of the global imports for that product. Within this large group, comprising 30 products and product groups, many products are not significantly produced in developing countries.

### Almonds
In this group, almonds are the largest imported product by value, but they do not offer the best opportunities for exporters from developing countries at the moment. Almost 90% of Europe’s almond supply comes from the United States of America, Australia and Spain, leaving little room for new suppliers, which does not mean that exporters from developing countries should entirely rule out supplying almonds to Europe. On the contrary, imports from developing countries are growing significantly but competition in almonds is relatively strong in comparison with other products from this group.

The following products are more challenging to export to Europe for new exporters due to high market concentration and large shares by the leading suppliers:

- orange juices, mostly from Brazil
- apple juices, mostly from China
- hazelnuts and dried grapes, mostly from Turkey
- pistachios, mostly from the US and Iran

Frozen vegetables, canned vegetables, fruit juice mixtures and canned tomato products are mostly produced and traded within Europe, limiting opportunities for suppliers outside the EU.
For additional analyses of more than 80 products contributing to Europe’s market growth see the annex of this study.

Tips:
Read CBI’s trends report to learn more about several trends influencing demand of processed fruit and vegetables in Europe, including the meta trends involving the growing consumer attention to healthier living habits and sustainable sourcing.

Learn more about the potential of various products in the CBI’s product factsheets.

This study has been carried out on behalf of CBI by Autentika Global.

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