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

European imports of processed fruit and vegetables grew steadily in the 2014–2018 period, but dropping slightly in 2018. A considerable share of these imports comes from developing countries. The leading European importing countries are Germany, the Netherlands, France and the United Kingdom, which offer particularly good opportunities for developing country suppliers. The products with the most potential currently are cashew nuts, frozen fruit, canned tropical fruit, peanuts, tropical fruit juices and walnuts. Consumers perceive these products as contributing to a healthy lifestyle, 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?

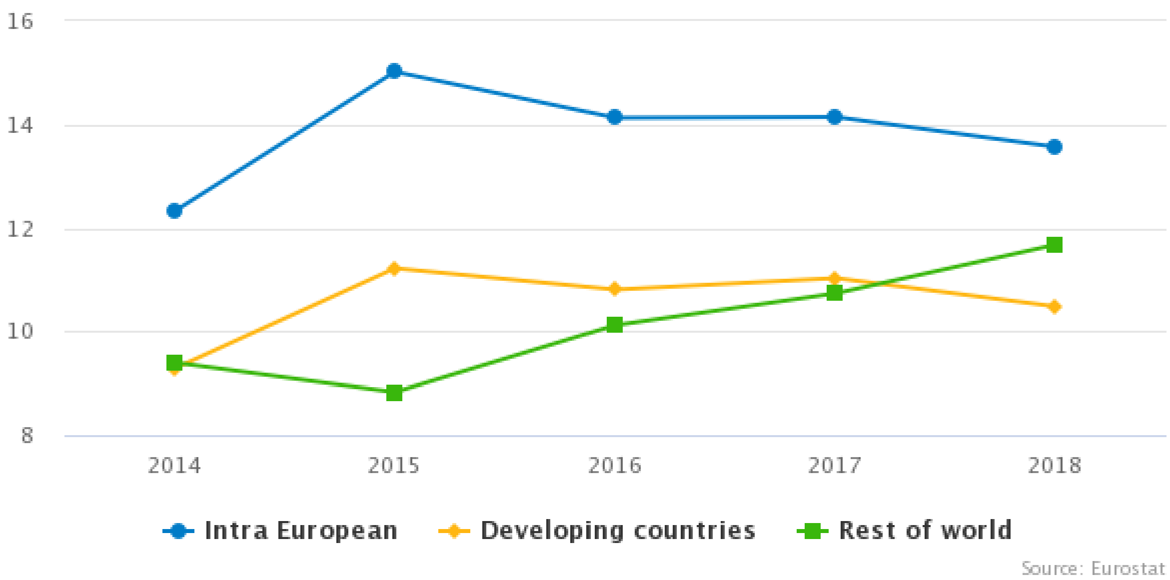
Europe is the largest importer of processed fruit and vegetables in the world, absorbing more than 40% of the global supplies. European imports of processed fruit and vegetables have increased every year in volume in the 2014–2018 period. Around 50% of Europe's imports originating from outside the EU come 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 between 2% and 3%, depending on product categories. Imports of edible nuts and frozen fruit are expected to expand the most, while fruit juices the least. Growth of Europe's imports is forecasted to remain lower than in other regions worldwide, such as South and South East Asia, where economic growth projections are higher than Europe's and markets are expanding more rapidly.

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

Figure 1: European imports of processed fruit and vegetables by origin

in € million

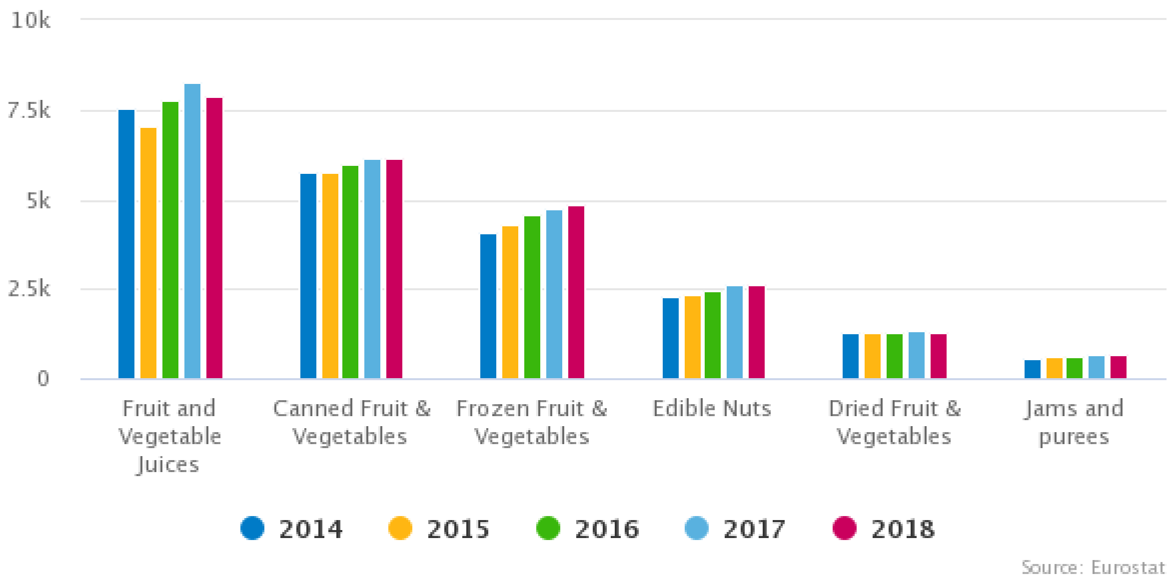


Between 2014 and 2018, European imports of processed fruit and vegetables grew every year by 4% in value and 2% in volume, reaching €35.7 billion and 23.5 million tonnes in 2018, a very slight reduction of -0.5% in import values compared to 2017.

Edible nuts comprised the largest category of processed fruit and vegetables imports in terms of value, accounting for almost a third of total imports. This significant share is explained by the relatively high value per kilogram of edible nuts compared to other products.

Figure 2: European imports of processed fruit and vegetables by sector

in 1,000 tonnes



Fruit and vegetable juices make the largest product group in volume with a 34% share of European imports. Fruit and vegetables canned and preserved in brine come second (26%), followed by frozen fruit and vegetables (21%), edible nuts (11%), dried fruit and vegetables (6%) and jams, marmalades and purees (3%).

In this sector, only fruit juices imports retracted in 2018, due to increased consumer perception of fruit juices 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. Consumers and businesses increasingly use frozen fruit, especially berries, in smoothies and as ingredients in many other products, such as fruit preparations, fruit fillings, freeze-dried products, jams, etc.

Industry experts forecast moderate growth for European import values of processed fruit and vegetables in the coming years.

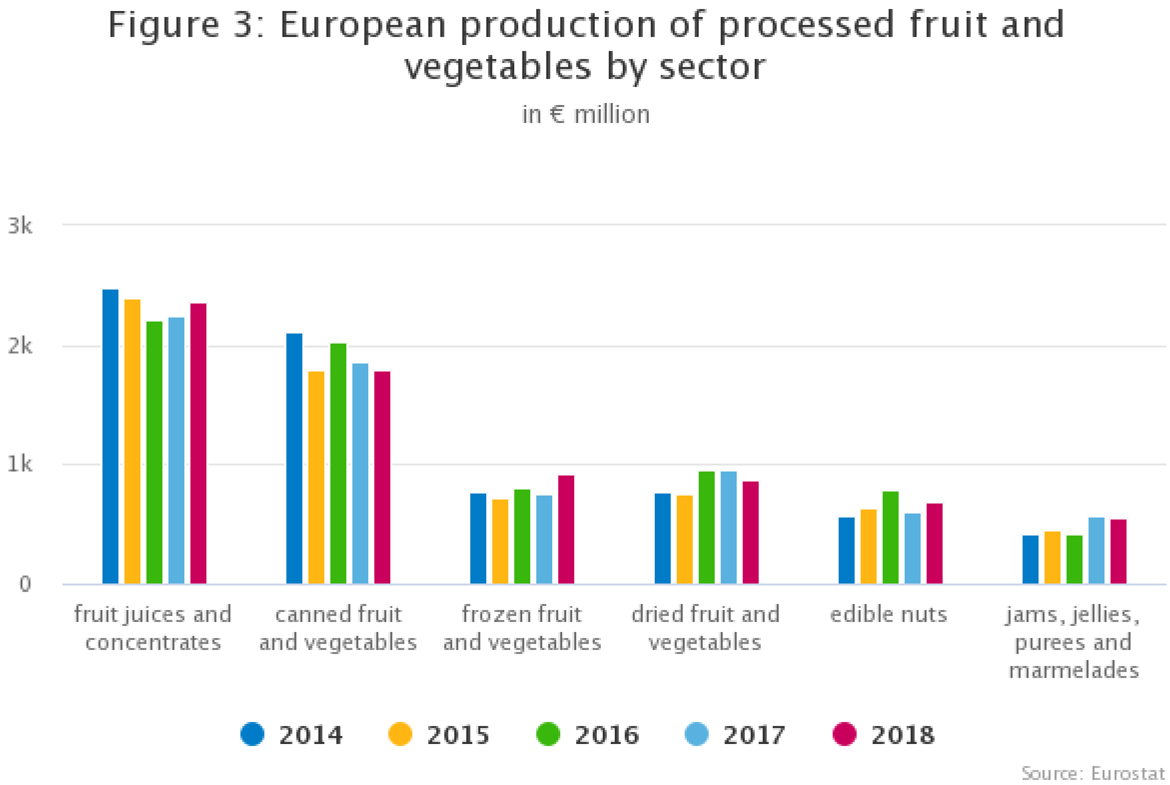
Europe is not self-sufficient in processed fruit and vegetables

European countries do not have suitable agro-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 are more significantly produced 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%.

Examples of processed fruit and vegetables produced in Europe include:

- Apple juice (Poland)
- Vegetable juices, canned tomato and tomato purees (Italy)
- Canned peaches and apricots (Greece and Spain)
- Table olives (Greece, Italy and Spain)
- Frozen vegetables (Belgium)
- Frozen berries (Poland)
- Frozen sour cherries (Hungary and Poland)
- Prunes and jams (France)

Still, none of these is produced in sufficient volume to fully meet European demand, and Europe’s domestic fruit and vegetables production does not show any tendency towards increasing volumes (Figure 3).



Products not produced in Europe or produced in very small volumes are your main opportunity. Table 1 below shows the annual growth of import values for the top-10 processed fruit and vegetables (6-digit HS codes) originating outside the EU in the 2014–2018 period.

Table 1. Average annual value growth of Europe’s processed fruit and vegetable imports from non-EU countries 2014–2018

	Annual growth 2015	Annual growth 2016	Annual growth 2017	Annual growth 2018	Share 2018
Processed fruit and vegetables	12%	-1%	3%	0%	
Shelled almonds	45%	-16%	-15%	2%	6.1%
Frozen vegetables	9%	3%	3%	1%	4.7%
Shelled cashew nuts	40%	14%	27%	-8%	4.2%
Concentrated orange juice	1%	-16%	8%	-6%	4.2%
Orange juice	4%	11%	-3%	7%	4.1%
Frozen fruit	9%	5%	10%	3%	3.3%

Canned and preserved vegetables	6%	5%	6%	4%	3.0%
Canned fruit	12%	9%	8%	4%	3.0%
Jams, jellies, marmalades, purees or pastes	11%	3%	5%	1%	3.0%
Shelled hazelnuts	51%	-16%	-14%	-9%	2.9%

Source: Source: Trade Map

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

- Cashew: Prices of cashew nuts collapsed in 2018, which explains the decrease in import values. Cashew nut imports reached a peak in 2017 but supply slightly outperformed demand, so sales from 2017 stock were still enough to meet demand in the first half of 2018. This whole scenario led to the drop in import values.
- 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.
- Hazelnuts: Imports of hazelnuts in 2018 did not actually decrease in volume but only in value and prices. Hazelnut prices are mainly determined by the Turkish supply, which accounts for more than 60% of the world's hazelnut crop.

The import products shown in Table 1 do not provide equal opportunities for all developing country suppliers. Competition can be very strong; in some cases one country alone dominates supply to Europe. For example, the US strongly dominates the almond supply, while Brazil practically controls orange juice production. In such cases, suppliers from other countries generally have difficulties competing with the dominant world 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 EU is not very high.

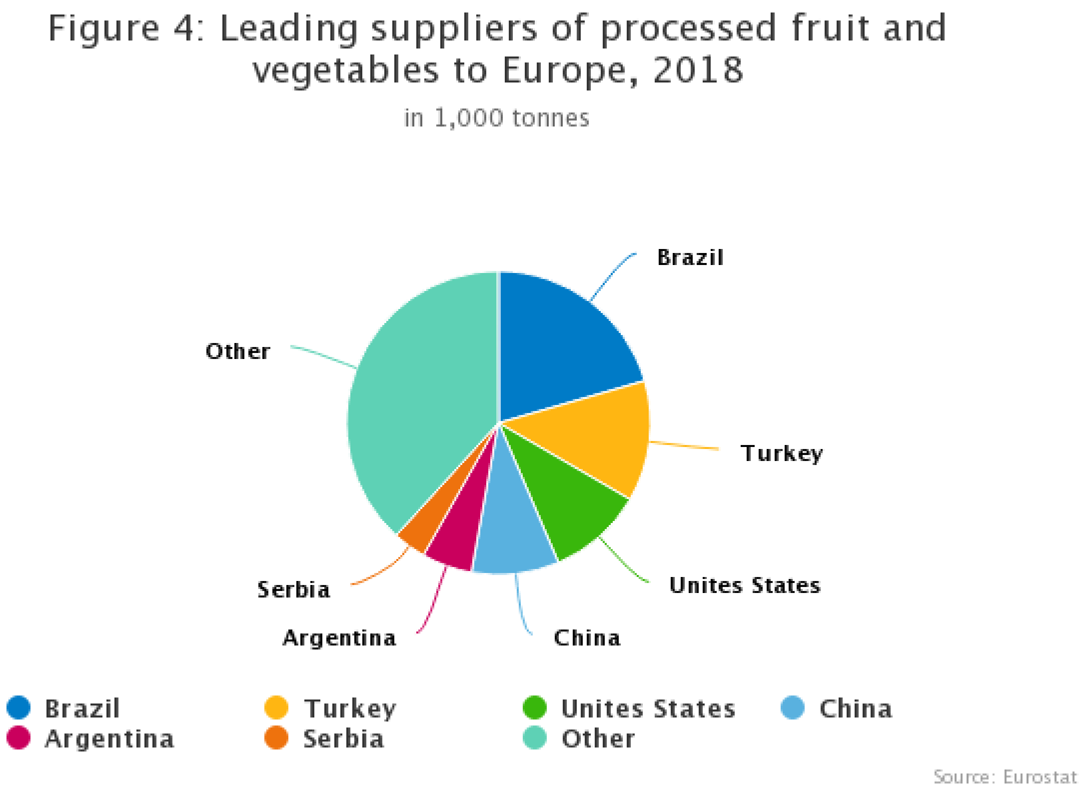
Approximately half of all the processed fruit and vegetables imported from outside the EU comes from developing countries. European imports from developing countries peaked in 2018 at a value of €11 billion and 6 million tonnes. Currently, most opportunities for new developing country suppliers can be found in large volume products, such as cashew nuts, frozen fruit and tropical fruit juices.

Products imported in relatively smaller volumes also offer opportunities for new developing country suppliers, including pistachios, macadamia nuts and dried tropical fruit.

Oh 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 oversupply 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. That will strongly depend on the development of star performers, like cashew nuts, or underperformers, like concentrated orange juice.

Brazil, the leading developing country supplier



Brazil is the leading developing country supplier of processed fruit and vegetables to Europe, mostly because of orange juice. Turkey comes second, leading European imports of hazelnuts, hazelnut paste, dried grapes and dried apricots. The United States is third, leading as a supplier of almonds, pistachios and walnuts to Europe.

Apart from Brazil, other developing country suppliers stand out in different product groups. Table 2 below breaks down the leading developing country suppliers per product group.

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

Product group	Top-4 developing country suppliers to Europe	Top products
Canned fruit and vegetables	China Turkey Peru Thailand	Canned tomato products Canned pineapples Table olives Canned asparagus Pickled cucumbers Canned palm hearts

Dried fruit and vegetables	Turkey China Tunisia Philippines	Dried grapes Dried apricots Dried mushrooms Dried vegetables Dates Desiccated coconuts Dried mangoes
Frozen fruit and vegetables	Serbia China Morocco Chile	Frozen raspberries Frozen strawberries Frozen blackberries Frozen mushrooms Frozen tropical fruit
Fruit and vegetable juices	Brazil Turkey Costa Rica Argentina	Orange juice Apple juice Pineapple juice Pomegranate juice Sour cherry juice Single citrus juices Tropical juices and purees
Jams, pastes and purees	Turkey Serbia Chile India	Hazelnut paste Berry purees Apple puree Plum puree Mango puree Dates paste
Edible nuts	United States Turkey Vietnam Argentina	Almonds Walnuts Hazelnuts Pistachios Cashew nuts Groundnuts (peanuts)

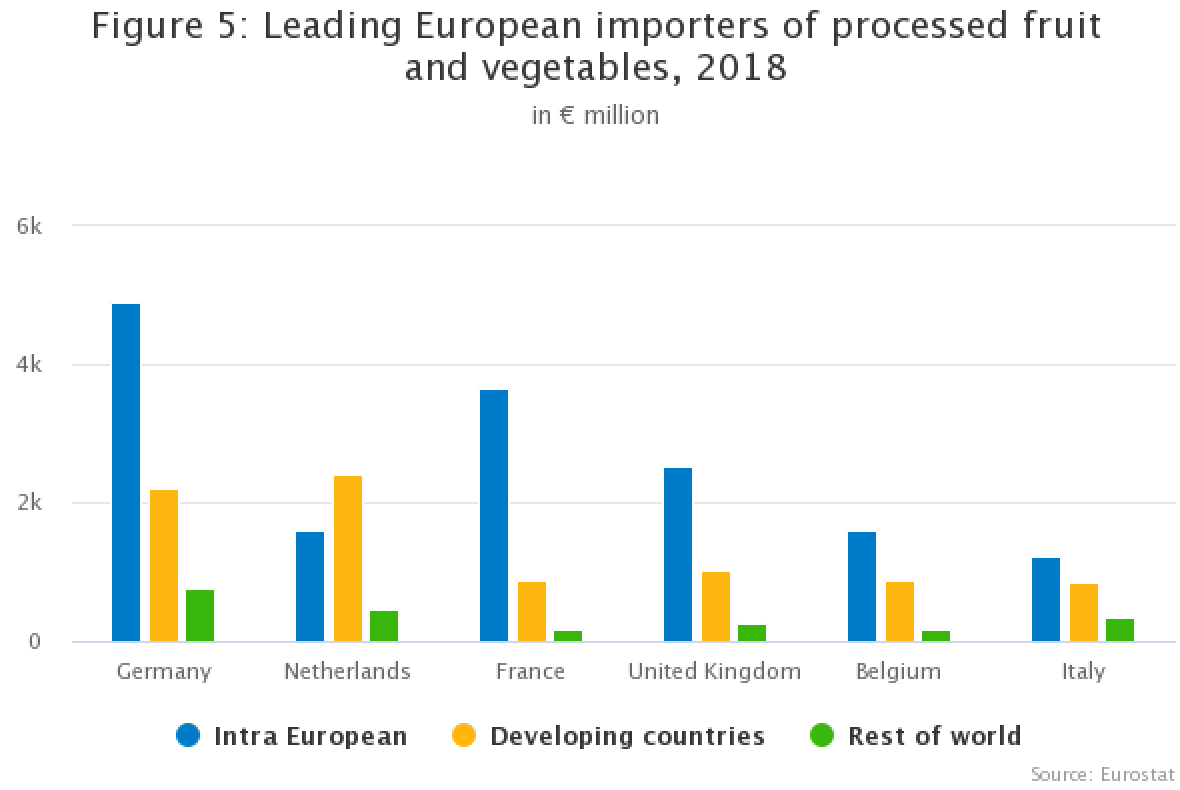
Tips:

- Stay up to date on 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. You can 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 frozen fruit and edible nuts by reading our product specific studies.

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 for interesting focus markets. Those two 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.



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

Germany is by far Europe's largest importer of processed fruit and vegetables: €7.8 billion in 2018, which means 22% of all EU imports in this category. More than 60% of Germany's imports come from other European countries, while imports from developing countries account for less than 30%. In import value, edible nuts are the largest product group among Germany's imports, followed by canned fruit and fruit juices.

Germany is also the largest European importer of edible nuts. Cashew nut kernels in particular offer good opportunities for developing country suppliers, as Germany is the largest European importer and market of cashew nuts. Imports of canned fruit and vegetables to Germany mainly originate in other European countries. In this group, canned pineapples, table olives and pickled cucumber offer the best opportunities for developing country suppliers.

Europe's leading fruit juice market is also Germany, however, it is a market under pressure, where 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 also provide solid opportunities for developing country suppliers, including purees and frozen fruit made of berries or tropical fruit.

The leading developing country supplier of processed fruit and vegetables to Germany is Turkey. Hazelnuts and dried grapes are Turkey’s main exports to Germany in the processed food and vegetables 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:

- Ukraine (apple juice, frozen fruit and walnuts),
- Tunisia (dried tomatoes),
- Syria (almonds),
- Ghana (dried mangoes and pineapples),
- Jordan (canned chickpeas and broad beans) and
- Madagascar (canned green beans).

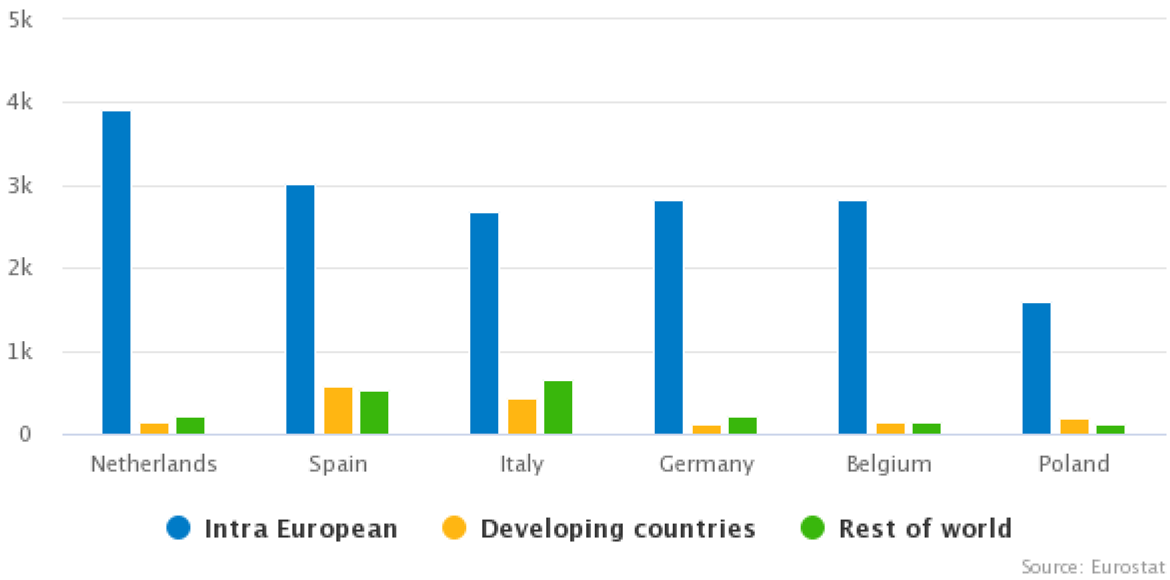
Sustainability is also trending strongly in Germany. According to the ITC’s sustainability trend reports, Germany is the second world market for fair-trade products and the largest European market for organic products. German residents also recycle the most packaging waste in Europe at 160 kg per capita annually.

Netherlands: the largest importer from developing countries

The Netherlands is, in fact, the largest importer of processed fruit and vegetables from developing countries in Europe, which make up 54% of all Dutch imports of fruit and vegetables. The Netherlands is also the leading European re-exporter, with tropical juices, orange juice and cashew nuts being the top re-exported products. Germany is the main destination for Dutch processed fruit and vegetables re-exports.

Figure 7: Netherlands processed fruit and vegetables imports, 2018

in € million



Fruit juices is the largest category in processed fruit and vegetables imported into the Netherlands. Within fruit juices, the top import 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, meaning peanuts, which opens opportunities for developing country suppliers. However, take into account that the Netherlands is mainly a transit country for imported groundnuts 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 of pecan nuts. Dutch pecan nut consumption passed 4.5 thousand tonnes in 2017, equivalent to 1.4 kg per capita.

Dried grapes also may offer opportunities for developing country suppliers. The Netherlands has the largest per capita consumption of dried grapes at almost 3 kg in 2017.

Examples of emerging suppliers to the Netherlands include:

- Egypt (frozen strawberries)
- Nicaragua (shelled groundnuts)
- Mozambique (cashew nuts and macadamia nuts)
- Lebanon (canned beans)

Adopting sustainable and ethical production practices also provide additional opportunities for new developing country suppliers. 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.

France

French imports of processed fruit and vegetables have grown at an annual rate of 4% in 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 among the top European importing countries at less than 20% of all its fruit and vegetables imports, but growing. The leading developing country supplier to France is Turkey, supplying mostly shelled hazelnuts.

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 edible nuts, France is the largest European consumer of walnuts but a large share of them are domestically produced. Within dried fruits, 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.

Examples of emerging developing country suppliers to France include:

- Kenya (canned green beans)
- Madagascar (canned green beans)
- Egypt (frozen strawberries)
- Indonesia (canned pineapples)
- Ghana (desiccated coconuts)

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 EU, thanks to an annual import growth rate of 4%. The leading developing country supplier to the UK is Turkey, supplying mostly dried grapes and dried apricots.

The UK is the largest market worldwide of Brazil nuts, consuming 2.8 thousand tonnes in 2017, and the leading European market of dried grapes (97 thousand tonnes in 2017). Berries processed in different ways — frozen, purees or juices — provide good opportunities for developing country suppliers, considering the United Kingdom is the largest European market of berry juices, nectars and smoothies. Total consumption of berry juices and nectars in the United Kingdom is estimated at approximately 60 thousand litres.

Examples of emerging developing country suppliers to the United Kingdom include:

- Peru (frozen tropical fruit and mango puree)

- Palestine and Jordan (dates)
- Guatemala (frozen tropical fruit)
- Ghana (cashew nuts)
- Malaysia (desiccated coconuts)

The economic and political uncertainty surrounding the Brexit process, which would see the UK leave the European Union, has affected the value of the British pound against the euro. As a result, more British buyers have started importing directly from developing countries, rather than buying from European importers. However, as the situation is still fluid and insecure, you should keep a close watch on the developments.

As the world's largest market for fair-trade products, comprising total annual retail sales of US$2.4 billion in 2018, the UK also provides good opportunities for fair-trade certified suppliers.

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 supplier to Belgium 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 so high compared to other European importers. Another striking characteristic is the large import value of pistachios. Belgium is the second-largest European re-exporter of pistachios, after Germany.

Examples of developing country suppliers gaining market share in Belgium include:

- Chile (canned asparagus and apple puree)
- Vietnam (frozen sweet corn)
- South Africa (shelled groundnuts)
- Bosnia and Herzegovina (frozen raspberries)
- Burkina Faso and Togo (cashew nuts)
- Moldova (walnuts)
- Lebanon and Palestine (dates)

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 supplier to Italy is Turkey, mostly exportin shelled hazelnuts.

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 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.

Some of the developing country suppliers gaining market share in Italy include:

- Chile (hazelnuts, mostly from Italy's Ferrero direct investment)
- Egypt (groundnuts in shell)
- Argentina (lemon juice)
- Azerbaijan (hazelnuts)
- Brazil (shelled groundnuts)

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 strong performance of developing countries makes these especially interesting markets.
- Study the examples of emerging developing country suppliers gaining market share in 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.

Other hidden potential markets

Only two European countries can be considered as 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, while in Poland it is frozen fruits. Both countries also produce the same products they import the most, 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.

Austria also provides opportunities for developing countries exporters of processed fruit and vegetables, being the ninth largest European importer in this sector. Although the Austrian population is small compared to other larger European markets, Austria has a very well developed fruit juice processing industry, which provides opportunities for developing country suppliers of raw materials. For example, think of concentrated juices, purees and frozen fruit.

As for other promising markets, Central and Eastern Europe have been growing the most. Among these countries, Poland showed the strongest increase in imports at 12% on average annually between 2014 and 2018. Polish imports of processed fruit and vegetables increased from €0.8 billion in 2014 to €1.3 billion in 2018. In spite of importing much smaller volumes than the top European importers, markets in Central and Eastern Europe are substantial enough to provide direct export opportunities for developing country exporters.

Local production 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 producing country is Spain, followed by France, Greece and Italy, although the positions in this list vary according to fluctuating production volumes.

Spain’s production of processed fruit and vegetables exceeds 650 thousand tonnes per year. Spain is the leading European supplier of table olives, but it also produces and exports other products, such as canned fruit, canned vegetables, almonds, citrus juices and jams.

France is the second-largest European producer of fruit and vegetables in very similar volumes as Spain’s. France is the leading producer of canned vegetables in Europe, mostly because it is home to Bonduelle, the French and European leading supplier of canned products. 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.

The third-largest producer of processed fruit and vegetables in Europe is Greece, which produced 540 thousand tonnes in 2017. An important supplier of table olives, canned fruit, dried grapes (currants) and dried figs, Greece is also the leading world supplier of canned peaches.

Within the European Union, the fourth-largest producer of processed fruit and vegetables is Italy. 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 world exporter of not-from-concentrate grape juice.

Tips:

- Explore opportunities in Europe’s medium-sized and smaller markets, especially growing markets like Poland.
- 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.
- Study your options for supplying to the European processing industry directly rather than through re-exporting countries.

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 in the European market are cashew nuts, frozen fruit, canned tropical fruit, peanuts, tropical juices and shelled walnuts. These products’ strong performance since 2014 is expected to continue in the coming years, since their nutritional benefits meet the current consumer demand for healthy foods.

Cashew nuts

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

Among processed fruit and vegetables, cashew nuts are the second most imported product in Europe by volume, after almonds. Almost all cashew nuts are sourced from developing countries.

The European market has imported cashew nuts from Vietnam, India and Brazil traditionally, but new developing country suppliers have been investing in processing facilities and gaining market share. Some examples of emerging suppliers of cashew nut kernels include Ivory Coast, Indonesia, Honduras, Mozambique, Nigeria, Benin, Tanzania, Burkina Faso and Ghana.

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

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. Among many tools, the initiative provides a management information system (3S or Sustainable Supply System) to stimulate productivity and quality, creating traceability and transparency in the supply chain.

Tip:

Learn more about the European market potential in the CBI cashew nuts study.

Frozen fruit

The growing consumer demand for convenient foods that require less preparation time has been driving the growing consumption of frozen fruit in Europe. The largest market for frozen fruit and vegetables in the world, Europe makes up nearly 50% of the total world imports. Large importing and consuming countries, like Germany, France, Belgium and the United Kingdom offer opportunities for exporters from developing countries.

Frozen berry consumption and imports are particularly significant in Europe. Frozen berries are popular as superfruit, often used in healthy drinks, such as smoothies. Other products that have grown above average include frozen cubes and frozen purees of tropical fruit such as mangoes, papayas and passion fruit.

The leading non-EU suppliers of frozen fruit to Europe, especially tropical fruit and berries, include Serbia, Ukraine, Peru, Belarus, China and Turkey. Emerging source countries include Mexico (frozen blackberries), Thailand (frozen pineapples), Egypt (frozen strawberries) and Morocco (frozen strawberries).

Tip:

Read more about the European market potential in the CBI studies on frozen berries, frozen strawberries, frozen tropical fruit and frozen fruit and vegetables.

Canned tropical fruit

Accounting for more than 42% of the world's imports, Europe is the largest market for canned fruit and vegetables in the world. Import volumes of canned fruit and vegetables also 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 products are the main market drivers.

India, China, Costa Rica, Thailand, Mexico and Philippines are the top developing countries supplying canned tropical fruit to Europe.

Please note that the market for canned tropical fruit in Europe is retail oriented and dominated by a relatively small number of suppliers. The best opportunities for new suppliers are in private label products and ethnic supermarkets.

Tip:

Read more about the European market in the CBI canned fruit and vegetables study.

Peanuts

Europeans consume approximately an annual 550,000 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, although 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.

Food safety certification supported with frequent laboratory tests and joined with corporate social responsibility (CSR) standards can additionally provide a great advantage for suppliers to European markets.

Argentina, China, Brazil, Nicaragua, India and South Africa are the top developing country suppliers of shelled peanuts to Europe. New, emerging suppliers include Senegal, Egypt, Malawi and Uzbekistan.

Tip:

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

Tropical fruit juices

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 accounts for more than 50% of world's imports. Exporting tropical juice ingredients, such as concentrated or frozen purees, provides good opportunities for developing country suppliers. Various factors explain the growing consumption of tropical fruit juices and purees in Europe, including:

- fruit beverage applications
- growing baby food segment
- consumer demand for convenient foods and foods that require less preparation, such as breakfast smoothies

The Netherlands, Germany, France and United Kingdom offer good opportunities for developing country suppliers of tropical fruit juices. 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.

The leading tropical juices supplying countries to Europe are Ecuador, Brazil, Vietnam, Peru, Chile and Thailand.

Tip:

Read more about potential opportunities in the European market in the CBI studies on tropical purees and pineapple juice.

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 for brain function and rich in omega-3 fatty acids. In Europe, Italy, Germany and Spain offer exporters the most opportunities for developing country suppliers. Introducing light kernel varieties, obtaining food safety certifications and following CSR standards can offer strong advantages over competitors.

Chile, Moldova, Ukraine, China, India, Kyrgyzstan and Turkey are the leading developing countries supplying walnuts to Europe. However, Chile and the United States largely dominate Europe's imports. France also produces significant volumes of walnuts.

Other products

Other products that have also contributed to the growth of Europe's processed fruit and vegetables imports include table olives, dried grapes, pickled vegetables, dried vegetables, pine nuts, pecans and other exotic nuts. These products were not among the five leaders in import volumes, but are also worth looking into.

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 EU import volume is greater than 1% of global imports for that product. Within this large group comprising 30 products and product groups, many products are not significantly produced in developing countries.

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 US, 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 do not offer many opportunities due to either decreasing demand or high competition by the leading suppliers:

- orange juices, mostly from Brazil
- apple juices, mostly from China
- hazelnuts, 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 the Europe's market growth see the annex of this study.

Tips:

Read the 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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