

# The European market potential for table grapes

Being one of the largest fruit categories, the table grape market in Europe is very mature. Grape companies that are anticipating on the trends such as seedless grapes and sustainable packaging will be most likely to participate on large markets such as the United Kingdom and Germany.

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## 1. Product description

In the fresh trade, most grapes (scientific name: *Vitis vinifera*) are table grapes destined for raw consumption. Therefore, this factsheet focuses principally on table grapes.

There are many different table grapes available, varying from white-green to red and dark blue. In Europe, the seedless varieties are most popular for consumption, such as the white-green Thompson and Sweet Globe, and the red Crimson, Flame Seedless and Ruby. There is a wide range of new varieties, complementing or replacing the older existing varieties. The seeded varieties are in decline (see trends below), but still widely cultivated and available, such as the white-green Italia and the red Globe and Victoria red.

Many of the grape varieties are produced under license.

Table 1: Product code and varieties

|                                 |  |
|---------------------------------|--|
| Harmonized System (HS) code     | 08061000 Fresh grapes<br>08061010 Fresh table grapes   |
| Commercial varieties (examples) | <p>Seedless</p> <ul style="list-style-type: none"><li>• White: Thompson, Sweet Globe, Sugraone, Regal, Centennial, Autumn Crisp, Cotton Candy</li><li>• Red: Crimson, Flame, Ruby, Sweet Celebration, Timco</li><li>• Black/blue: Summer Royal, Melody, Autumn Royal, Sable Seedless</li></ul> <p>Seeded</p> <ul style="list-style-type: none"><li>• White: Italia</li><li>• Red: Red Globe, Victoria Red</li><li>• Black: Sweet Jubilee</li></ul> |

## 2. What makes Europe an interesting market for table grapes?

Grapes are one of the most demanded fruit in Europe. The market is mature and consumption is relatively stable, but imports occur year round and will gradually increase due to a declining production in Europe.

## Grapes are a major fruit in Europe

Table grapes are among the most popular fruits in European consumption. The market for table grapes is mature, with large volumes and a relatively stable demand all year round. This means there are several supply windows throughout the year during which you can step in and meet the demand.

With a value of 1.4 billion euros table grapes have the highest import value after bananas. The import volume has gradually increased from 598,000 tonnes in 2014 to 682,000 tonnes in 2018 (see Figure 1). This reflects an import growth of a few percent per year. The average annual grape prices (import value per ton) vary between 5 to 10%. These statistics indicate that the European grape market is large and stable.

Supply shortages in Europe can temporarily increase the need for external supply and oversupply is relatively easily absorbed. Retail promotions for (in-season) grapes are common. Over time the demand for grapes will continue to grow slowly, but no sudden big increases in consumption should be expected.

### Tips:

Stay up to date by subscribing to newsletters and reading news sites such as [Eurofruit](#), [FreshFruitPortal](#) and [Freshplaza with regular overviews of the global grape market](#).

Visit the [Fruit Logistica](#) in Berlin, the largest trade fair for fresh produce in Europe. All the relevant traders of table grapes will be there.

## The European table grape production is decreasing

Europe is the largest grape producer in the world, and a top-five producer of table grapes. But production costs in Europe are increasing and growing grapes is becoming less profitable. This creates opportunities for non-European suppliers that are competitive and overlap with the European season.

Europe produced 23.7 million tonnes of grapes in 2017. Only an estimated 1.5 million tonnes were table grapes (for fresh consumption), while less than a decade ago the production was still more than 2 million tonnes (see Figure 2). Italy, Spain and Greece are the main producers of table grapes for the European supply.

With European production decreasing, you can expect a growing need for imported grapes, especially early and later in the local season (June or November). At the same time, the increasing adoption of late varieties allow Spain and Italy to be on the market longer and reduce the need for imports. If Europe does well with production, it will have a positive trade balance and export volumes will be greater than imports – this happens most often in August and September.

The bulk of the imported grapes arrive between December and May. This should be the main focus for most of the foreign suppliers.

### Tip:

See the different supply windows in the CBI study on [Entering the European market for table grapes](#).

### 3. Which European countries offer most opportunities for table grapes?

Most imports from non-European suppliers is registered by the United Kingdom and the Netherlands. Unlike in the United Kingdom, the peak grape consumption in Germany and France takes place during the European season. Off-season, mainland Europe is mostly supplied through the Netherlands. Spain and Poland may also become better transit hubs in the future for foreign suppliers with exports to respectively southern and eastern Europe.

#### The Netherlands: a logistical hub for table grapes

The Netherlands is an important logistical hub for long-distance table grapes. Therefore you can use the Netherlands either for its logistics or for finding different trading companies that can distribute your grapes throughout Europe.

The Netherlands is the principle entrance point for table grapes into Europe. From here, a large volume is re-exported to the rest of Europe. This is especially true for long-distance table grapes from southern Africa, South America and India, but also for grapes from Egypt and Namibia. With 289,000 tonnes, the Netherlands exports more foreign grapes than most European countries are importing individually (see Figure 4). Germany is the main destination for grapes that are re-exported by the Netherlands.

The Netherlands usually offers a good reflection of what is happening in Europe. South Africa continues its growth as the principal supplier to the European market. Peru and India have clearly increased their exports of low-priced, seedless grapes at the expense of Chilean grape growers (see Table 2).

Table 2: Dutch imports of table grapes, in 1000 tonnes

|                     | 2009  | 2018  | Change in percentage |
|---------------------|-------|-------|----------------------|
| Total non-EU supply | 296.0 | 369.0 | 25%                  |
| South Africa        | 100.7 | 126.5 | 26%                  |
| Peru                | 8.4   | 59.7  | 615%                 |
| Chile               | 102.2 | 57.7  | -44%                 |
| India               | 24.1  | 57.3  | 138%                 |
| Brazil              | 20.7  | 24.3  | 18%                  |
| Egypt               | 14.8  | 23.1  | 56%                  |
| Namibia             | 11.1  | 18.1  | 63%                  |
| Turkey              | 0.4   | 0.8   | 90%                  |

|           |      |     |      |
|-----------|------|-----|------|
| Argentina | 10.0 | 0.7 | -93% |
|-----------|------|-----|------|

### Tips:

Make use of Dutch traders when you have difficulties in entering different European markets. Dutch importers often have wide experience in trading and are familiar with the different European preferences. Dutch fruit companies have a no-nonsense mentality, so calling or visiting them often works better than e-mailing.

Some of the table grape traders you can find on the website of the Dutch [Fresh Produce Centre](#), the organisation that looks after the interests of the fresh fruit and vegetable sector in the Netherlands. The member list ('onze leden') is only available in Dutch.

## United Kingdom: mature table grape market

The United Kingdom is probably the most mature import market for grapes. The market is saturated and the best way to enter this market is by replacing other suppliers with better prices or through new varieties, original packaging and other innovations (see trends below).

United Kingdom is a typical destination market with large imports and high consumption. The country imported 273,000 tonnes of grapes in 2018 and exported only a very limited volume (see Figure 4). The British consumer eats on average over four kilos of grapes per person per year. You can find a wide variety of grapes on the market, but only little growth can be expected.

The British market is slowly becoming a price fighting market. Market saturation, oversupply and devaluation of the British pound (due to the upcoming Brexit) result in strong pressure on grape prices.

For competitive suppliers the United Kingdom remains an important market. A main advantage of the United Kingdom is that most grapes are imported directly from diverse origins. Suppliers from South Africa, Chile, Egypt, Peru and India all successfully export grapes to the British market.

### Tip:

Invest in product innovation to stand out on the British market, for example in special grape varieties or packaging options. Get inspiration by seeing what kind of grapes are already on the British market, for example on [Mysupermarket.co.uk](https://mysupermarket.co.uk).

## Germany: attractive market size

Germany has a lower consumption rate than the United Kingdom, but as a country it offers the largest European market for table grapes. Indirect (via trade hubs) and regional import as well as dominance of discount retailers are your main challenges in supplying the German market.

From the total import volume of 317,000 tonnes in 2018, 287,000 tonnes stayed in the country (see Figure 4). This makes Germany the largest European market for fresh grapes. Whereas the United Kingdom imports directly from countries such as South Africa and Chile, Germany mainly sources its grapes from Italy and

through logistical hubs such as the Netherlands. Germany's consumption peaks during the European season.

However, there is little growth in the German grape market and discounters are increasingly dominating the market working with smaller margins. Most large food retail chains have a discount concept, such as Netto of the Edeka-Group, Penny of the Rewe-Group and Lidl of the Schwarz-group. To give an idea about the size of these discounters, [the number of outlets vary between 2200 and 4320](#).

As a supplier, it is important to realise that supermarkets and discounters in Germany have high requirements but at the same time expect a reliable economic offer. This means you can potentially sell significant volumes to these retailers if your product meets all the requirements. The largest part of the overseas imports for supermarkets concerns seedless table grapes.

### Tips:

Try to get into a supply contract with a supermarket or discounter for a reliable supply and a stable price. But be prepared for extensive paperwork such as filling in your actions on food safety and sustainability and submitting your pesticide spraying registers.

Adopt different quality and sustainability standards to enter the German market. Read more about these standards in the [buyer requirements for fresh fruit and vegetables](#) and in the study about [exporting fresh fruit and vegetables to Germany](#).

## France: third-largest end market

A preference for local and in-season fruit makes France a smaller grape market than Germany or the United Kingdom. But with a population of over 66 million consumers and a large history in grape production, it is still the third-largest destination market for imported grapes, although most is sourced in Europe.

France is one of the larger grape producers in Europe. In 2017 almost 6 million tonnes of fresh grapes were produced – but most were destined for the winery industry. In table grapes France is not very competitive and table grape production is decreasing. French growers lack a wider variation of commercial cultivars for export and their climate is not as ideal as further south in Europe. For that reason, the French consumption of fresh table grapes depends partly on the supply from Italy and Spain.

Like in Germany, the peak consumption in France takes place during the European season. Locally produced table grapes such as the black muscat and chasselas (both used for wine and fresh consumption) get higher prices in retail. But there is competition from other local fresh fruit such as peaches, apples and pears, which have a higher production than fresh table grapes.

Competition of local fruit and a dominant supply from European growers make it difficult to find ample opportunities during the European season (July to November). Off-season, France sources most table grapes from South Africa, Peru, Chile and Morocco.

### Tip:

Learn about which table grape varieties are commonly grown and sold in France; look at [grape varieties on AOP Raisin de table](#) and the [grape offer in supermarkets such as Carrefour](#). Discuss with potential buyers in France which varieties they think have potential – share samples if your variety is still unknown.

## Poland: offers opportunities for eastern suppliers

Surprisingly Poland is among the largest importers of table grapes. Because of its geographic location, Poland offers most opportunities for suppliers from the east.

Together with Romania and Austria, Poland is forming an eastern corridor for grapes from origins such as Turkey and Moldova. In 2018 Poland registered a direct import volume from Turkey of 4,700 tonnes and 900 tonnes from Moldova (see Figure 5). The total imports of grapes from these origins will be even higher when comparing indirect trade statistics.

Grapes with other non-European origins are often traded through logistical hubs in Western Europe such as the Netherlands, as well as Germany. If your country is located far from Poland, these countries can help getting your grapes on the Polish market.

### Tip:

Consider going to the [Bronisze wholesale market](#) where much of the Moldovan grapes are sold. This can be a good starting point to get contacts in the Polish grape market.

## Spain: potential to become a grape trade hub

Spain is the second-largest producer and net exporter of table grapes after Italy. But recent years also show increasing imports. This provides new opportunities for suppliers of counter-seasonal grapes or nearby countries that can fill in supply gaps early in the Spanish season.

Spain's imports from non-EU countries have increased in five years from 14,700 to 21,500 tonnes in 2018. The increasing imports are an indication of Spain positioning itself as a trade hub for grapes in Europe. Especially in the last two years Spain has been growing in off-season imports. This counter-seasonal volume mainly comes from Chile (9,300 tonnes) and Peru, which almost doubled its exports in 2018 to Spain to 8,100 tonnes due to overproduction. Table grapes produced nearby that complement the Spanish season come mainly from Morocco (2,100 tonnes).

### Tip:

Find potential production and trade partners in Spain during the [Fruit attraction trade fair](#).

## 4. Which trends offer opportunities on the European table grapes market?

By seizing the opportunities of important trends like convenience and reducing the use of plastic you can stay ahead of competition and strengthen your relationship with European buyers.

### Seedless and taste become leading factors for grape consumption

The European consumer has an increasing preference for convenience. This trend is positive for table grapes, because they are easy to consume and ideal as a fresh snack. To further improve the consumer experience seedless grapes are setting the new standard and are most appealing to consumers.

## Seedless

Seedless grape varieties have become more dominant over the past years and their market share is expected to develop further. The United Kingdom was at the forefront of this development, but now they are the preferred variety in most of northern Europe. For example, the [German market is close to 80% seedless](#). Southern and Eastern European markets have a more traditional consumption, but will also follow the seedless trend in the next years.

Grape growers in Spain and increasingly in Italy and Greece have started a transition towards seedless grape production to meet the growing demand. Also in counter-seasonal regions such as Peru, Chile and South Africa, many growers are shifting to more seedless varieties. For example, until recently Peru was dominated by Red Globe grapes, but now many producers such as [Ecosac](#), [Pampa Baja](#) and [Agricola Peru Grapes](#) also produce Crimson, Flame or Sugraone and continue to find new improved varieties.

Seeded grapes will not disappear from the market, but their demand will depend more on attractive pricing or distinction in taste.

## Taste

Because grapes are often consumed as a snack and as a product of indulgence, you must consider consumer experience as an important success factor for your product. Especially when dealing with experienced buyers, who appreciate premium quality, you can distinguish yourself with superior quality and taste. For example there is a growing niche for highly aromatic varieties such as the Sable Seedless or Cotton Candy.

Specific preferences can differ per region and buyer. Most importantly, besides offering seedless grapes, your product must be fresh, sweet and crisp.

### Tip:

Select the grape varieties that best suit your client's market, or find the right buyer for your variety. Visit your export market regularly to update your market knowledge and get information about new varieties from large grape breeders such as [Sun World International](#) and [SNFL group](#).

## New movement drives sustainable and plastic-free packaging

Reducing plastic and making packaging more sustainable will be key for future table grape sales. It is very contradictory to the demand for convenience, but it will impact the packaging practices of all grape suppliers.

The abundant use of packaging was already an issue in the minds of many retailers and conscious consumers. But since the [European Parliament approved the new law banning single-use plastics](#), companies are forced to take action.

Currently most grapes are sold in punnets or clamshell packages, for example 500g, but [smaller snack-sized packages](#) such as 250g or 170g are also increasingly available. These smaller packages do not increase the total volume of grapes, but it only adds to the plastic waste.

There is a need for more sustainable packaging and exporters must be prepared for this change. Grape packers were already using more and more top-sealed punnets to reduce the plastics of lids (clamshells), and now companies have started to implement new sustainable packaging such as [biodegradable and compostable carry bags](#) and [cardboard punnets](#) (adopted by retailer Waitrose).

It is good to anticipate changes and be innovative with packaging solutions. But the developments in this field are not yet finished and it will be a challenge to evaluate and implement packaging options which are suitable and acceptable in your target market. Leading retailers and organic brands are probably first to demand sustainable or plastic-free packaging, but you can expect structural changes throughout the table grape sector.

### Tips:


Offer different packaging options to your client and anticipate developments in sustainable packaging and convenience products. Using attractive packaging will also help distinguish your product.


Read more about [which trends offer opportunities on the European fresh fruit and vegetable market](#) on the CBI market intelligence platform.


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