

# The European market potential for fresh plums and other stone fruit

Plums are the most promising stone fruit to export to Europe. They are the most imported stone fruit from non-European suppliers and its supply has increased most over the years – local production often runs short and is limited to the summer. Germany and the United Kingdom will offer you most opportunities for export, however, you will need to find the right varieties to please consumers.

## Contents of this page

1. [Product description](#)
2. [What makes Europe an interesting market for plums and other stone fruit?](#)
3. [Which European countries offer most opportunities for fresh plums and other stone fruit?](#)
4. [Which trends offer opportunities on the European market for fresh plums and other stone fruit market?](#)

## 1. Product description

Plums (scientific name: *Prunus*) are a type of stone fruit, also known as drupes, which refers to a fleshy fruit with a hard inner layer, or stone, that surrounds the seed. Plum species that are significant for commercial trade include the hexaploid European plum (*Prunus domestica*) and the diploid Japanese plum (*Prunus salicina*). Within these species there are many varieties and hybrids varying from red, purple to yellow and green skin or flesh, many of which you can find for sale in Europe.

Besides fresh consumption, plums are also consumed dried (dry prunes) or used in juice, dairy products or liquor.

Harmonized System (HS) code	080940 Plums and sloes 08094005 Plums
Commercial varieties (examples)	<ul style="list-style-type: none"><li>• Damson (purple or black skin, green flesh, clingstone, astringent)</li><li>• Victoria (yellow flesh with a red or mottled skin)</li><li>• Mirabelle (<i>Prunus insititia</i>, dark yellow, predominantly grown in northeast France)</li><li>• Greengage (firm, green flesh and skin even when ripe)</li><li>• Reina Claudia (French variety, sweet, green-yellow skin and flesh)</li><li>• Satsuma plum (firm red flesh with a red skin)</li><li>• Yellowgage or golden plum (similar to greengage, but yellow)</li><li>• Stanley (medium to large freestone plum, common in Eastern Europe)</li><li>• Pluot (crossbreed 75% plum - 25% apricot)</li></ul>

Other stone fruit	0809100000 Apricots 0809210000 Sour cherries (prunus cerasus) 0809290000 Other cherries 0809301000 Nectarines 0809309000 Peaches 0809409000 Sloes
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Sources: Eurostat; [Wikipedia](#); [Frutas-hortalizas.com](#)

## 2. What makes Europe an interesting market for plums and other stone fruit?

Within the stone fruit category plums are the most popular and the most imported stone fruit in Europe. Difficulties in local supply can further increase demand.

### Climate adversity increases the need for imports

A successful plum season is subject to good climate conditions. In Europe many companies depend on this, especially in Spain and Italy, which supply most of the plums within Europe. The production in Spain has been declining since 2014 (in 2019 the first growth is expected again). As an exporter you will regularly find short-term opportunities due to the varying availability of plums worldwide.

Frost and excessive rain drastically reduced the European supply of plums in 2018. The off-season supply also encountered some problems due to drought in South Africa, the main non-European plum supplier. Because of the weather issues the trade and imports of fresh plums went down in volume. But the value of plums from non-European origin still increased (see Figure 1), indicating lower availability and higher prices. This raised the opportunities for alternative suppliers such as Chile, Moldova, Serbia and Macedonia. On the downside, high prices can also result in less consumption.

Plums and other stone fruit are typical summer fruit. This means consumption generally increases with attractive prices (high availability) and warm weather. As a supplier you need to be prepared for fluctuations in trade.

#### Tip:

Stay up to date with the seasonal supply, production volumes and possible shortfalls in supply. Check the news and market overviews regularly on platforms such as [Freshplaza](#), [Eurofruit](#) and [FreshFruitPortal](#).

### Plums offer most opportunities for exporters

Plums, sweet cherries and nectarines offer most opportunities for non-European suppliers. Fresh plums are imported most and have the largest variety of supply countries. Therefore plums offer most opportunities for non-European exporters.

Peaches, nectarines and plums are the most consumed stone fruits in Europe. Each of these fruits have a production value of over a million tonnes per year. Peaches are the most produced stone fruit in Europe with

between 2.5 and 3 million tonnes and therefore require less imports from foreign producers.

The demand for imports from outside Europe is greatest for plums, sweet cherries and nectarines (see Figure 2). Sweet cherries represent the highest value due to the higher kilo price, but in volume plums lead the imports in the stone fruit sector. The non-European import volume of plums increased by 62% from 2014 to 2018.

The supplying countries for plums are also more diverse than for cherries; the demand for cherries is largely met by Turkish exporters. Plums are mainly supplied by exporters from South Africa, Chile, Moldova, Serbia, Macedonia, Bosnia and Herzegovina and Turkey with volumes in 2018 varying from 39,000 tonnes (South Africa) to 1,700 tonnes (Turkey). This leads to the conclusion that export opportunities for plums can be created for different origins.

#### Tip:

Read more about your competition on the fresh plum market in the CBI study *Entering the European market for fresh plums and other stone fruit*.

### 3. Which European countries offer most opportunities for fresh plums and other stone fruit?

Germany and the United Kingdom are the largest destination markets for fresh plums, but for imports from non-European suppliers the Netherlands is most relevant. Germany and the United Kingdom are also good markets for sweet cherries and nectarines. Austria plays a logistical role in the transshipment of Turkish cherries to Germany.

Table 1: Importing countries with highest import value from non-European suppliers, in million euros

Plums and sloes		Sweet cherries		Peaches / nectarines		Apricots		Sour cherries	
Netherlands	46	Germany	77	United Kingdom	28	Germany	5.8	Austria	1.9
United Kingdom	27	Austria	22	Netherlands	19	Romania	3.0	Germany	1.9
Germany	18	United Kingdom	19	Germany	11	United Kingdom	2.9	France	0.4

Source: ITC Trademap

#### Germany: the largest end market for fresh plums

Germany is the largest destination market for fresh imported plums, but just like other producing countries the external demand is linked to the local production. German buyers prefer German plums, then European plums and lastly plums that are imported from outside Europe.

The import volume of plums in 2018 was 43,000 tonnes, half of which came from Italy and Spain. South Africa was the largest non-European supplier (off-season) with 4,800 tonnes.

German plum imports are not stable and vary according to the national production. In 2016 and 2017 the production was lower than in previous years, so the import volume went up. In 2018, a record of 70,000 tonnes of German plums decreased the need for imports (see Figure 3).

Other stone fruit that has potential in Germany are sweet cherries and nectarines (see Table 1). Cherries are currently mainly supplied by German and Turkish suppliers. Nectarines have little local production, the largest amount is imported from Spain and Italy during summer and a smaller winter supply of around 3,300 tonnes from Chile and South Africa. For suppliers from other countries there can be opportunities when focusing on the months with low supply (see supply calendar in the market entry study for plums) or when you are able to compete with producers in Chile and South Africa.

## **United Kingdom: important importer of non-European plums and nectarines**

Imports of plums in the United Kingdom have decreased in the past years, but it remains the second-largest importer with a relevant volume from non-European suppliers.

The United Kingdom has a minor production of plums, which is close to 9,000 tonnes. This is not enough to supply the masses and large buyers turn to foreign suppliers to meet the demand. The import of plums was 39,000 tonnes in 2018 (see Figure 3). While British farmers focus on flavour and the quality of their local varieties, buyers may be more price sensitive and choose cheaper imports. However, with [Brexit](#) and the devaluation of the British pound in mind, you can expect prices and imports to face more pressure – which could explain the decreased import volume.

Plums are not as much of a traditional summer fruit as in larger producing countries, so the consumption is less bound to the summer period. This is likely the reason why South Africa is the largest supplier of plums with 12,900 tonnes in 2018, before Spain and Italy (respectively 7,700 and 7,100 tonnes) which focus more on the summer supply. This is also good news for other counter-seasonal suppliers that can be an alternative source to South African exporters.

The United Kingdom also leads the European import of nectarines, which amounted to 20 million euros in 2018.

## **Netherlands: typical trade hub for off-season stone fruit**

The Netherlands is a trade hub for many off-season fruits. In stone fruit their presence is less obvious as it is a typical local summer fruit. Nevertheless, it is the largest importing country of plums from non-European origin (see Table 1).

Plums are mainly imported by the Netherlands from January to April, before the start of the Spanish season. This makes the Netherlands an interesting country for non-European suppliers. In total the Netherlands imported 32,000 tonnes in 2018 (see Figure 3), with South Africa and Chile as main suppliers. A volume of 23,500 tonnes was (re-)exported, putting the Netherlands in third place in plum exports after Spain and Italy.

Besides plums, the Netherlands also trade a significant amount of nectarines. In 2018 nectarine imports were 32,600 tonnes, of which approximately half was exported.

## **France: big in plum consumption**

France is one of the main plum-consuming countries in Europe. However, imports are only a small part of the total consumption. Most consumption is made possible by locally produced plums.

France is the fourth-largest importer of plums. Imports are relatively stable and added 15,800 tonnes to the market in 2018 (see Figure 3). This is only an estimated 8% of the French consumption. Most of the imports are

supplied by Spain (9,200 tonnes).

The consumer is mostly focused on local and in-season plums, such as the Mirabelle, Greengage, Reine-Claude variety among many others. Plums are consumed fresh as well as used in a variety of food preparations such as dried prunes, marmalade or brandy. Further [innovation in variety development, colour and taste must help the plum industry maintain its market](#). Despite the focus on local plums, the plum tradition should be able to sustain a good percentage of imported plums.

## Romania: leading in plum production

Romania has a plum culture and its growing import of lower-grade plums offer opportunities for nearby supplying countries.

According to production statistics Romania is the largest plum producer in Europe with several local varieties (for example: Tuleu Gras, Grase Romanesti, Vinete Romanesti) and few commercial varieties for export such as Reine Victorias. On a global level only China and Serbia produce more. Romania produces up to 500,000 tonnes of plums under normal conditions. In 2018 the country outperformed itself with 830,000 tonnes. Despite the increased production volume, imports kept increasing. Plums are used for making brandy ([Tuica](#)) as well as different food preparations. Very few plums are exported.

Romania mainly offers opportunities for low-priced plums such as those from Moldova, its main supplier due to its cultural and geographical proximity. About 9,400 of the 11,800 tonnes of imported plums came from Moldova. Although Romania imports more and more plums, as a supplier you must be competitive and preferably at close distance to support the growing demand.

## Poland: high consumption of affordable plums

Plums are a common fruit in Poland. When the local yields are low, extra plums are imported, but price is an important factor in supplying Poland.

Poland is one of the larger plum producers in Europe, with fruits harvested from both commercial orchards and domestic production. In 2017 the plum production declined from the usual 100,000 tonnes to less than 60,000 tonnes. The lower yields were compensated by an increasing supply from Spain and Moldova. The usual imports of 10,000 to 11,000 tonnes went up to 36,000 tonnes in 2017 (see Figure 3). As an exporter you must respond quickly to take advantage of these sudden opportunities.

The prices of Polish plums are usually lower than German ones, [according to industry sources about 20 percent lower](#) during the season. As an external supplier you will also have to deal with the lower prices that Polish wholesalers are used to pay for plums.

### Tips:

Find potential trade partners at the [Fruit Logistica](#) in Germany or at the [Fruit attraction trade fair](#) in Spain.

Always keep in mind the local production and preferences. When you find a potential partner in Europe (for example through trade fairs) you can discuss with which plum varieties and markets they have positive experience.

See [Gardenfocused.co.uk](http://Gardenfocused.co.uk) for plum varieties that are cultivated in the United Kingdom. You can use this to compare with the plums you export to the United Kingdom and define possible strengths of your product.

## 4. Which trends offer opportunities on the European market for fresh plums and other stone fruit market?

There is more and more attention for local and seasonal plums and other stone fruit. This can hamper imports, but the ongoing development in new tastes and varieties will provide opportunities for growers that are able to differentiate with superior products.

### Focus on taste increases opportunities for hybrids and new varieties

Taste and consumer experience have become important in the purchase of fresh plums. Plums need to be at their optimal ripeness when bought and consumers have a preference for sweet varieties. This has paved the road for new varieties that excel in sweetness, appearance or bite. As a supplier you can offer something unique to capture the consumers that go for taste and quality.

Hybrids such as the [Pluot](#) (75% plum - 25% apricot) find their way into mainstream channels and growers in producing countries such as Spain, Chile and South Africa experiment with new varieties. Plum growers try to give plums, a traditional mass-produced fruit, a more exclusive character by prioritising varietal innovation, adding value with colour and taste. This is also a way for them to differentiate their product. Selecting the right varieties is an important part of positioning your company on the European market.

Growers and fruit marketers work together in getting new varieties to the consumer. For example, the fruit company Mack in the United Kingdom and South African stone fruit producer Fruits Unlimited have joined forces by founding [The Custom Plum Company](#) with the ambition to [bring a series of exclusive Zaiger Interspecific plums to the British market](#).

#### Tips:

Find the right varieties that are most favoured in your destination market. Check wholesale markets and retail shops to see which varieties are sold in which countries.

Inform yourself about new plum varieties and trends by communicating with breeding companies such as [Zaiger's Inc Genetics](#) in South Africa.

### Attention for local seasons limits the imports to off-season

There is an increased attention to the specific season of fruits, which is often promoted by retailers that add extra value to locally produced fruit. When there is an abundant local supply, it will become more difficult to sell plums from abroad.

During the local season, plums are already cheaper and more promoted than the rest of the year. But several supermarkets give extra attention to fruit that is locally produced. This is seen for example with [British plums](#) in Tesco and [French plums](#) in Carrefour, for which the local origin and sometimes the national flag are clearly presented.

While consumer awareness of local seasons increases, the opportunities for developing countries are often limited to the off-season and supplementing the European production. In full season you will have to find new ways to compete with locally grown fruit, for example by offering unique plum varieties.

#### Tip:

Verify when it is most convenient for you to export to Europe. Look at the supply calendar in the


Market entry study of plums and other stone fruit, and try to plan around the bulk supply from European producers. The European production is limited to the summer period.

Read the [CBI Trends in fresh fruit and vegetables](#) to get more insights into fresh fruit trends.


This study has been carried out on behalf of CBI by [ICI Business](#).

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