

Entering the European market for fresh plums and other stone fruit

Plums and other stone fruit are mass products in Europe, of which Spain is the main supplier. But European domestic production varies according to weather influences, opening room for other suppliers. The large channels for stone fruit can help foreign fruit enter supply programmes, but competition is fierce between different stone fruit as well as from producers in Spain and Italy. International partnerships and specialisation can be the main factors in helping a successful market entry.

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1. What requirements must fresh plums comply with to be allowed on the European market?

Fresh plums must comply with the general requirements for fresh fruit and vegetables, which you can find on [the CBI market information platform](#). The [Trade Helpdesk](#) provides an overview of export requirements for plums (code 08094005) per country.

What are mandatory requirements?

Pesticide residues and contaminants

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers. To avoid health and environmental risks, the European Union has set maximum residue levels (MRLs) for pesticides and other contaminants, such as heavy metals, in and on food products. Products exceeding the MRLs are withdrawn from the market.

Note that buyers in several EU Member States, such as the United Kingdom, Germany, the Netherlands and Austria, use even lower maximum residue levels than those established by European legislation.

Tips:

Check [the EU Pesticides database](#) to find all MRLs and those specific for blueberries. Search by product or pesticide and the database to find the list of associated MRLs.

Use [integrated pest management](#) (IPM) in production to reduce the use of pesticides. IPM is an agricultural pest-control strategy that includes growing practices and chemical management.

Read more about MRLs [on the website of the European Commission](#). Check with your buyers if they require additional requirements on MRLs and pesticide use.

Make sure that lead contamination in your blueberries remains below 0.10 mg/kg and cadmium below 0,050 mg/kg, according to the [maximum levels for certain contaminants in foodstuffs](#).

Phytosanitary regulation

European [phytosanitary regulations](#) and the [new European Directive](#) require plums and other stone fruit of the *Prunus* genus to go through plant health checks before being introduced into or moved within the European Union.

Tip:

Learn more about the European phytosanitary rules in [Council Directive 2000/29/EC](#) and the new [Implementing Directive 2019/523](#) on the protective measures against the introduction of harmful organisms in the European Union.

Quality standard

Information on quality, size, packaging and labelling requirements for plums can be found in:

- [UNECE STANDARD FFV-29 concerning the marketing and commercial quality control of PLUMS, 2017](#)

The United Nations Economic Commission for Europe (UNECE) also has specific marketing standards available for other stone fruits:

- [UNECE STANDARD FFV-26 PEACHED AND NECTARINES, 2017](#)
- [UNECE STANDARD FFV-13 CHERRIES, 2017](#)
- [UNECE STANDARD FFV-02 APRICOTS, 2017](#)

Fresh plums should, at the very least, be:

- intact;
- sound – produce must be free from rotting or deterioration likely to make it unfit for consumption;
- clean, practically free of any visible foreign matter;
- practically free from pests;
- free from damage caused by pests affecting the flesh;
- free of abnormal external moisture;
- free of any foreign smell and taste;
- able to withstand transport and handling;

The development and state of maturity of the plums must be such as to enable them to continue their ripening process and to reach a satisfactory degree of ripeness.

Europe almost exclusively requires Class I plums as a minimum. Plums in this class must be of good quality and within the following permissible tolerances:

- a slight defect in shape;
- a slight defect in development;
- slight defects in colouring;
- slight skin defects of elongated shape must not exceed in length one-third of the maximum diameter of the fruit. Healed cracks may be allowed for Golden gage varieties (Green Apricots, Dauphines, Greengages with green skin and yellowish sheen);
- other slight skin defects of which the total affected area must not exceed 1/16 of the whole surface;
- a tolerance of 10% is allowed for fruit that meets Class II standards;
- a tolerance of 10%, by number or weight, of plums not meeting the sizing requirements is allowed.

In no case may the defects affect the fruit flesh, the general appearance of the produce, the quality, the keeping

quality and the presentation in the package.

Tips:

Maintain strict compliance with quality, delivering it as agreed with you buyer. Being careless with your standards will lead buyers to raise issues with quality.

Negotiate with your buyer to include different sizes and a mixed pallet per shipment. This will enable you to sell all sizes from your orchard. But make sure the sizes are the same per pallet.

Size and packaging

Plum size is determined by the maximum diameter of the equatorial section.

Table 1: Minimum sizes for plum varieties

	Classes Extra and I	Class II
Large-fruited varieties*	35 mm	30 mm
Other varieties	28 mm	25 mm
Mirabelles and Damsons	20 mm	17 mm

Source: *See list of large-fruited plums in the [UNECE standards for plums](#)

Commercially different size classifications and packaging are used. South African coding usually uses letters (AAA to C), while in Spain often calibre numbers are used (4-14). Uniformity in the calibre is important.

Table 2: Commercial plum sizes AAA-C

Size code	Group AAA	Group AA	Group A	Group B	Group C
Diameter (mm)	60-65mm	55-60mm	50-55mm	45-50mm	40-45mm
Packaging	One piece, double layer, 5 kg		One piece, double layer, 5 kg packed in punnets		

Table 3: Commercial plum sizes 4-14

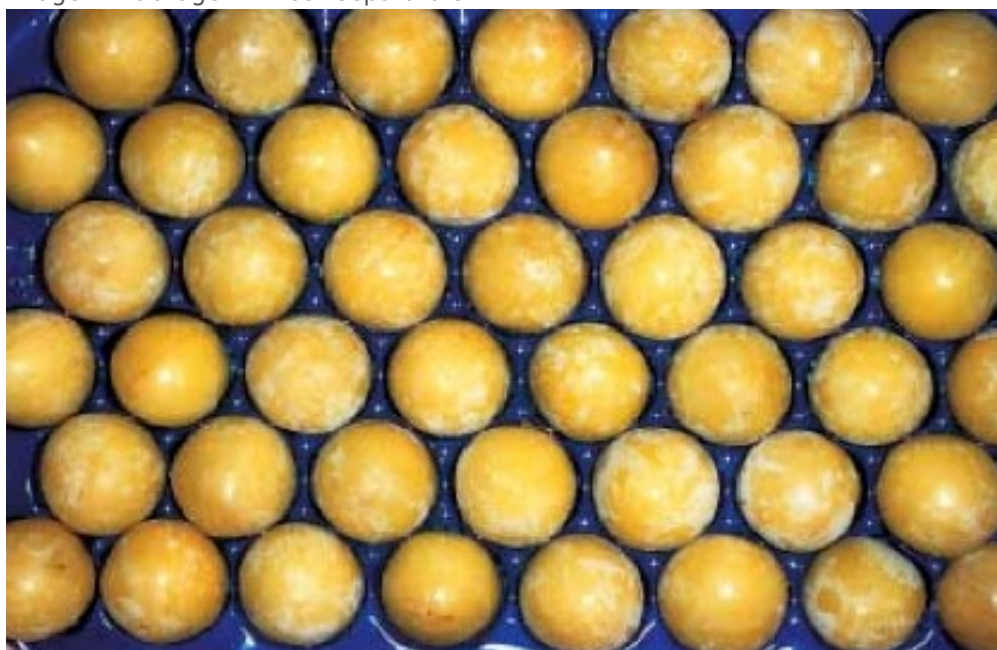
Calibre	4	5	6	7	8	9	10	11	12	13	14
Diameter (mm)	38-41	41-44	44-47	47-50	50-53	53-57	57-60	60-63	63-67	67-70	70-73

Quantity (pcs)	33	24	20	17	15	12	-	-	-	-	-
Packaging	in 5 kg box										

The most common packaging for plums is the corrugated cardboard box.

- Open boxes of 5 kg are preferred, with a loose cover to remove the content easily. Cell separators are frequently used, especially for Class Extra and Class I (see image 1).
- Boxes with flaps are folded and inserted to form a cover that can be removed when the fruit is displayed.
- Plums can also be packed in plastic baskets or punnets, often inside a net, and shipped in a box (see image 2).

Image 1: Package with cell separators



Source: [OECD](#)

Image 2: plastic baskets inside a net



Source: [OECD](#)

Tips:

Always discuss specific packaging requirements and preferences with your customers.

See the [buyer requirements for fresh fruit and vegetables](#) on the CBI market information platform for the legal labelling requirements.

Check the additional requirements if your product is pre-packed for retail in the [Codex General Standard for the Labelling of Prepackaged Foods](#) or [Regulation \(EU\) No. 1169/2011](#) on the provision of food information to consumers in Europe.

What additional requirements do buyers often have?

Variety

Buyers evaluate plum varieties on characteristics such as sweetness and firmness. Important features for marketing fresh plums are:

- firmness;
- crunchiness;
- brix level;
- sweetness-acidity ratio;
- soluble solid content;
- freestone (flesh comes easy off the kernel).

Plum buyers and marketers are often interested in new varieties with superior characteristics and taste, but traditional European varieties maintain great importance as well. In general, sweet varieties are most favoured for fresh consumption.

Tip:

Make sure your buyer knows your product and variety. Buyers are often reluctant to purchase stone fruit varieties they are not familiar with. Send samples if necessary and discuss the product features before shipping.

Certification

Common certifications for fresh plums and other stone fruit are [GlobalG.A.P.](#) for good agricultural practices and [BRCGS](#), [IFS](#) or similar HACCP-based food safety management systems for packing and processing facilities. Management systems recognised by the [Global Food Safety Initiative \(GFSI\)](#) are most recommended.

Sustainability and social responsibility

For fruit collectors and exporters it is important to show that you are engaged in the well-being of your production sources, both socially and environmentally. The best way to do this is through adopting social and environmental standards, such as Sedex Members Ethical Trade Audit ([SMETA](#)) and [GlobalG.A.P.](#)

Tips:

Implement at least one environmental and one social standard. See the [Basket of Standards](#) of the Sustainability Initiative of Fruit and Vegetables (SIFAV).

For other additional requirements, such as payment and delivery terms, see the CBI's reports on [buyer requirements for fresh fruit and vegetables](#) and [tips for doing business with European buyers](#).

What are the requirements for niche markets?

Organic can be a requirement in fresh and processed plums

Organic certification can be an interesting way to make your plums stand out and market them at a higher value. The demand for organic plums is still a niche, but you might find additional opportunities in the processing of organic plums. Dried plums or prunes, for example, are often part of the health food segment, which has a high share of organic sales. By preserving organic plums directly after harvest, it is also easier to maintain their quality.

Organic plums are often purchased and processed by specialised companies, such as [Tradin Organic](#), which sources organic plums in Serbia for freezing, drying or making puree.

For non-European suppliers, it is important to [show compliance with the European legislation for organic products](#). You must use sustainable and organic production methods and apply for an organic certificate from an accredited certifier.

Tip:

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

2. Through what channels can you get fresh plums and other stone fruit on the European market?

Well integrated exporters have the best chance to supply to large channels, such as supermarkets, whether or not via an importer or service provider. Class I plums are dominant.

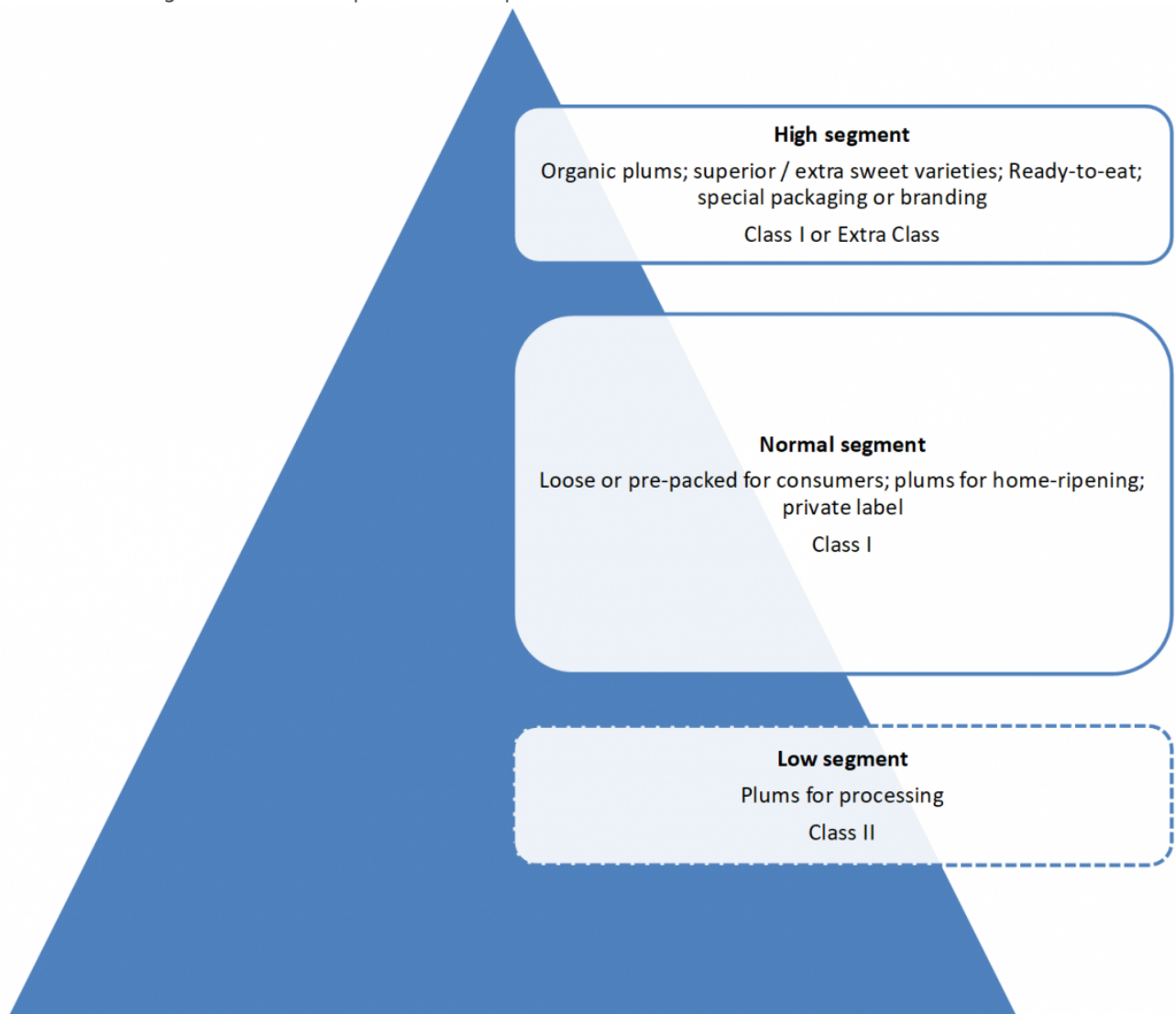
How is the end market segmented?

The principal segment for fresh plums are Class I plums, either loose or packaged (see buyer requirements above). Plums for home ripening are usually priced lower than perfectly ripe ones.

Plums are a traditional fruit in Europe and therefore difficult to give it exclusivity. Retailers often use branding and special packaging to push plums in high segments. Typical features they promote are ready-to-eat or ripe fruit and extra flavour or sweetness. Future segmentation will likely include more varieties with superior characteristics.

Class II plums are not preferred for fresh sales, but are rather used for processing. The same goes for odd sizes and surplus production volumes.

Figure 1: Market segments for fresh plums in Europe



Tips:

Focus on fresh plums with export quality. Export quality means at least Class I and attractive sweet varieties. Lesser varieties and qualities are generally not imported from outside Europe.

Be honest about the quality and defend your product. Document your cold chain and product appearance with photos before shipping, in case value and price are renegotiated.

Through what channels do plums reach the end market?

Importers and service providers

Importers play a central role in the distribution of fresh plums. They are familiar with all the different requirements of end clients and are able to distribute to different market channels, such as wholesalers and supermarkets.

Importers that are specialised in stone fruit and well integrated with producers become attractive service providers to large retailers. By sourcing plums and stone fruit in different regions, they can guarantee year-round supplies. Some of these companies have their own packing stations, although pre-packed plums are also

supplied by packers in origin countries.

When import companies provide different services, such as retail packing and multiple origin sourcing, they can become service providers to large retailers. These include large integrated fresh suppliers, such as [Total Produce Indigo](#), the French subsidiary of the Total Produce Group, [Greenyard Germany](#) and [OGA/OGV Nordbaden](#).

Tips:

Connect to importers by visiting trade fairs, such as [Fruit Logistica](#) in Berlin and [Fruit Attraction](#) in Madrid, or use their [virtual market place](#) and [online catalogue](#).

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

Processors

Part of the fresh plum supply ends up in the processing industry. This usually happens right after harvesting close to the cultivation area. Greece and Spain produce most plums for the processing industry. Peach and nectarines are also important for processing into juice and dairy products.

Supermarket programmes

Supermarkets are a major channel for plums and other stone fruit. During the European season, plums are typically supplied by European producing countries, such as Spain. It is therefore easy for supermarkets to get closely involved in the sourcing of these products. Several supermarkets have their own purchasing centres in Spain, such as Carrefour (Socomo) and Rewe (Eurogroup España). But these purchase centres are also responsible for importing from non-European countries.

Direct sourcing helps supermarkets to improve cost efficiency and control the supply chain with maximum transparency. However, only large producers will qualify to directly supply to a supermarket chain, and most likely they will still have a service provider to assist with import and logistics.

Large European supermarket chains, such as Germany's Lidl and the Netherlands' Albert Heijn, have selected external service providers to supply them with a programmed supply of stone fruit, including plums. They work with exclusive partnerships ([OGL Food trade](#), [Bakker Barendrecht](#)), but others also work with temporary contracts.

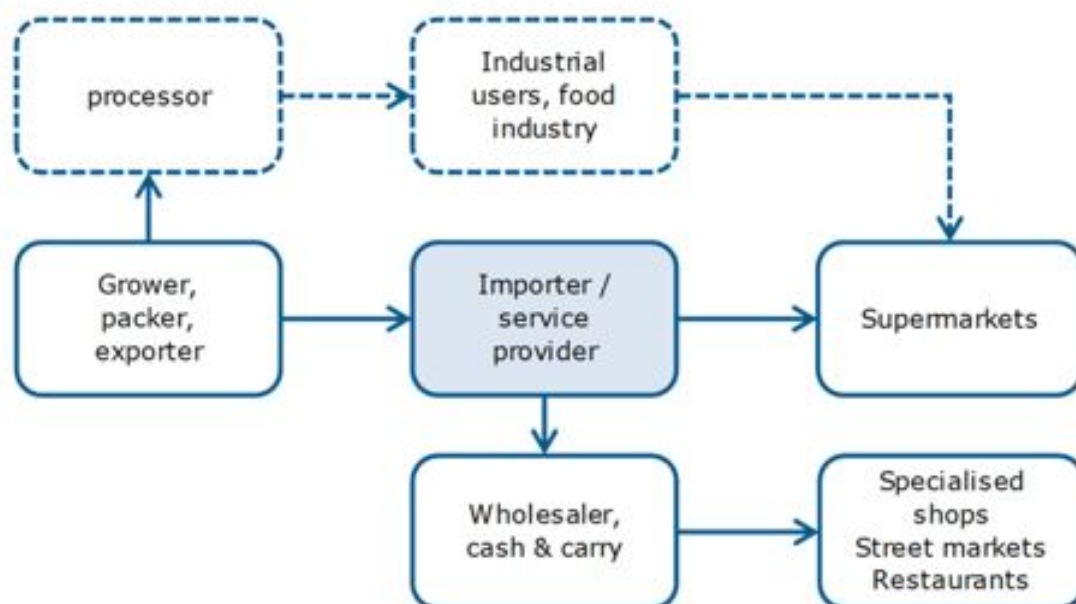
Wholesalers (spot market)

As any other fruit, plums also need a spot market. For plums, the spot market is especially important to get locally produced plums that are not suitable for supermarkets on the market. The spot market also helps regulate supply shortages and oversupply, and it services small outlets.

Traditional fruit wholesalers cover the spot market, move according to trade fluctuations. They supply to specialised shops, street merchants, restaurants and hotel chains. Sometimes these companies combine import and wholesale activities, but a traditional wholesaler does not take many risks with importing long-distance plums or other stone fruit. Typical wholesale markets include [Rungis](#) in Paris and [Mercabarna](#) in Barcelona.

Large fruit wholesalers, such as [Staay Food Group](#), maintain a large international network and offer their own cash & carry service points, where clients can purchase a wide variety of fruit and vegetables, including [plums](#), [cherries](#), [nectarines](#), [peaches](#) and [apricots](#).

Figure 2: Market channels for fresh plums and other stone fruit



Tip:

When visiting plum producing countries (see competition below), try to visit the local wholesale market to get an idea of the varieties, presentation and prices of plums and other stone fruits.

What is the most interesting channel for you?

Service providers and specialised importers are the most logical channels to market stone fruit. Importers and traders can represent your product in the European market. But without a guaranteed or fixed price, this can be tricky because you depend on the performance and network of your buyer. Being part of a retail supply programme gives you the best security and margins are often more profitable. However, the requirements are high and the room for negotiation is minimal.

The most likely route to become part of a retail programme is to cooperate with a service provider that has a local infrastructure and supply contracts with retailers. Large producing exporters have the best chances to find cooperation with supermarkets and their service providers (see examples of service providers above).

If your production is small, you can either look for cooperation with other producers and mutual benefits by extending production volume and supply season, or you can build commercial relations with traders and established importers.

Importers that work with stone fruit include [Roveg](#) (Netherlands), which has subsidiaries in important plum producing countries Spain and Chile, [Kölla](#) (Switzerland), which has multiple sales and purchase offices throughout Europe, and [Global Fruit Point](#) (Germany), which also has representatives in France and the Netherlands. Traders are used to working with multiple supply sources and can add your supply to other trade flows. The standards they maintain are the same as the wholesale or retail clients they work with.

Tips:

Select your buyer relations wisely and be sure that your importing partner defends your interests. You must know what kind of network and experience they have; the most reliable partners often have

supply contracts or programmes with important end clients.

Read the [CBI tips for finding buyers](#) and the [tips for doing business with European buyers of fresh fruit and vegetables](#).

Focus on long-term commercial relationships and supply chain integration. This can also include taking part in several steps of the supply chain, such as setting up commercial platforms, contracting production or joint ventures. Read the [example of a German-Bosnian partnership on Freshplaza](#).

3. What competition do you face on the European fresh plums and other stone fruit market?

The market for stone fruit is competitive. Different fresh fruits can potentially substitute each other, but in plums you will also be in competition with European and non-European producers. Supply gaps will be your biggest opportunity.

Where are your competitors located?

Many European countries produce plums and supply their own markets when plums are in season. Spain, Italy and France compete in supplying to other European countries. South Africa is the largest non-European supplier to EU countries, but in the last five years, Chile and Moldova grew the most in plum export volume to Europe, while Serbian plum exports to the EU rose as well.

Table 4: Indicative supply calendar for fresh plums to Europe

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec
Spain												
Bosnia and Herzegovina												
Serbia												
Macedonia												
Italy												
France												
Germany												
Moldova												
Argentina												
Chile												
South Africa												

Europe: Spain and Italy

Europe's total plum production is close to 1.3 million tonnes. Most of the production is consumed or processed in the countries where the plums are cultivated. A small part, 42 thousand tonnes in 2018, is shipped outside Europe. Roughly 190 thousand tonnes of the cultivated plums end up in the fresh export channels to serve other European countries. Spain and Italy are the largest supplying countries to neighbouring markets, but their plum exports have been declining in recent years.

Spain supplied other European countries with 51 thousand tonnes of fresh plums in 2018, which was 32% less than five years earlier (see figure 3). Spain struggles with increased production costs, while production volumes in recent years have gone down due to excessive rain. Nevertheless, Spain will remain Europe's most important supplier of fresh plums with its main target markets being Germany, United Kingdom, France and Portugal.

Italy's supply of fresh plums fluctuates. In a good season, Italy exports up to 45 thousand tonnes to other European countries, mainly Germany and the United Kingdom. In 2018, Italian plum exports were lower than 34 thousand tonnes.

During the high-summer months (July–September) the supplies from Spain and Italy are at their peak (see table 4). Your best chance to supply to Europe in the same season is when production in these countries faces serious downfalls, for example, due to weather.

South Africa

South African producers have experience in exporting a variety of fruit, among which many citrus and stone fruit. The country has the most ideal growing period to supply counter seasonal plums to Europe. Because it barely competes with European growers, South African plum exports to Europe are relatively stable at approximately 40 thousand tonnes annually, which makes South Africa the largest non-EU plum supplying country to Europe.

Some South African growers are integrated in European joint ventures, such as [The Custom Plum Company](#), which is part of the [Fresca Group](#) in the United Kingdom. The United Kingdom is, together with the Netherlands, the main destination for South African plums.

In the past few years, weather proved to be a weakness for South African stone fruit cultivation. Drought has had a major effect on yields in 2018 and 2019. The total South African exports of plums and sloes declined to 58 thousand tonnes in 2018 from 67 thousand the year before. In 2019, the [results are expected to be negative](#) as well. South Africa is an important counter seasonal supplier of plums to Europe, but recent difficulties in production have opened opportunities for suppliers from other countries, which can change rapidly from one year to the next.

Chile

Chile is the largest plum exporter in the world, having surpassed Spain several years ago. Chilean growers exported 121 thousand tonnes of plums and sloes in 2018, 24% more than in 2017. But Europe is not the main export market for Chilean plums. Almost two-thirds of all Chilean exported plums are destined for China, the United States and Brazil.

After a few years of lower volumes, Chilean plum exports have been in an upward trend again, reaching 22 thousand tonnes to Europe in 2018. Chile fills in the off-season supply gaps, for example, when South Africa has lower availability. Europe is also a good market for Chile when prices in other markets, such as China, are decreasing due to Chilean oversupply.

Chile's large export-focused plum production continuously works on varietal improvements. According to [Fruits of Chile](#), three key varieties are Angeleno (purple skin), Larry Ann (intense red skin) and Black Amber (dark skin) and new varieties with unique colour and flavour are being introduced, such as Candy Stripe, Dapple Dandy and the Lemon Plum. You can learn from Chile's experience with plum varieties, but if you meet them in the same harvesting period, Chilean exports will be strong competitors.

Moldova

Moldova's plum exports to the EU increased significantly from 3.7 thousand tonnes in 2014 to 14.3 thousand tonnes in 2018. Romania, Poland and other eastern European countries were the main markets for Moldovan plum growers.

In 2014, Moldova shifted its focus from Russia towards the European Union, after trade negotiations and an import ban in Russia. The [wider tax-free quota for plums](#) increased Moldovan plum exports to Europe, although the 10 thousand tonnes quota was quickly filled. Now Moldova is looking to expand the tax-free quota.

Prices of Moldovan plums are generally favourable, but growers are still inexperienced with the quality requirements of buyers from the EU. It will take the Moldova some time to be competitive in quality, but development agencies, such as [USAID](#), are working hard to change this.

Currently, Moldovan producers are able to export to Russia again and recently in 2019 [Russia also removed the import taxes on Moldovan fresh fruit](#). It is uncertain how this will affect Moldova's focus on the EU market in the future. Russia is for Moldovan producers a better known and easier market with less requirements. But at the same time, Moldova is trying to get more connected with the EU and if their focus remains on the EU single market, they may become stronger competitors.

Serbia

Serbia is one of the largest plum producers in the world and growing as a competitor in the European plum market. Serbia could be much bigger in the export market if it were not for the local demand and processing of fresh plums. Plums are used in Serbia's local industry for making prunes and the spirit slivovitz.

If prices and demand for plums are high, Serbian farmers can shift their produce to the fresh export market and become a stronger competitor in the European supply, which affects Serbia's fresh plum export volumes. The lack of a steady fresh supply to Europe withholds Serbian producers from building up a more significant reputation in fresh plums with EU buyers.

The Serbian supply season is similar to the south of Europe and the country is perfectly located for supplying to the eastern European markets of Romania and Poland, for example. In 2018, Serbian plum exports to the EU were 8 thousand tonnes, which is larger than the long-term average.

Tips:

Make sure you can match the volume and the quality of leading export countries, such as South Africa and Chile. For example, by working with different supply sources, you can try to extend your volume and supply season and become more attractive to European buyers.

Diversify your markets. Opportunities for plums in Europe vary from year to year, so it is best to do business with several key markets, including several European countries.

Which companies are you competing with?

Strong competitors in fresh plums cover a long supply season with several varieties. Through integration with growers and building partnerships with representatives in Europe, these companies achieve strong market positions. Specialisation in specific varieties and organic plums can be a possibility to stand out from other suppliers.

Tany Nature

[Tany Nature](#) is one of the largest stone fruit and plum growers in Spain, with 2,800 hectares of planted land in Spain and Portugal and their own packaging facilities. It has the size and the means to do in-house research and development, adopting the best possible plant material and production practices.

The company has control over the entire supply chain from production until the marketing of plums. This control makes them a strong player and attractive to buyers. For large buyers in Europe, they are therefore a safe choice. In addition to supplying to the EU market, they also export to Brazil and South Africa.

Delecta Fruit

Citrus and stone fruit exporter Delecta Fruit is owned by South African leading plum producers. They supply a wide variety of plums from different regions, covering a long season from mid-December to April.

The long season and the engagement with growers makes Delecta Fruit an attractive supplier for leading European retailers and wholesalers. In addition, practically all aspects are well organised, from logistics with cold chain management to certification for food safety and sustainability. Among their large buyers is [Total Produce Indigo](#) in France.

OrganoGroup

[OrganoGroup](#) is a producer of stone fruit and apples in South Africa which has been certified organic for 15 years. They are one of the few non-EU suppliers of organic plums, showing that you can find niche markets through specialisation.

They work in close cooperation with specialist buyer [OTC Organics](#), which operates in the Netherlands and in Canada. With their cooperation, organic fruit has found sales opportunities in Germany, Scandinavia and Switzerland, among other regions where organic consumption is relatively high.

Tips:

Show that you are in control of your operation. Implement quality monitoring systems to guarantee perfect handling and cold chain.

Develop both export skills and production knowledge, connecting with stone fruit cultivation. Both are important to get into business with important buyers.

Specialise in a specific product if you cannot compete in volume and price.

Which products are you competing with?

Fresh plums compete with other stone fruit, such as peaches and nectarines (see local production in figure 4). Kilo prices tend to be slightly higher for plums, which sometimes influences consumer choice towards other stone fruit. New sweet plum varieties are a good way to justify the higher price.

Stone fruit in general are often marketed as affordable mass products when in season. As a result, plums and other stone fruit are economical alternatives for other, more expensive fruit, such as mangoes.

Price and retail promotions play an important role in consumer purchases.

Tip:

Work on your presentation. With attractive packaging and nicely sorted plums, you will add value for your client and create an advantage over other fruit not as well presented.

4. What are the prices for fresh plums and other stone fruit?

The prices for plums vary per season according to their availability. Most plums become available during the European season and that is when prices are low because of large local volumes and fewer shipping costs. Other factors that influence the price are varieties and sizes. For example, pluots and triple-A size are higher in value.

The average trade price for plums is a little over €1/kg, which increases when plums are imported during the off season. Wholesale prices vary roughly between €1.10/kg and €1.50/kg, while imported plums go for asking prices of up to €2.5/kg, while prices for local produce can drop easily below €1/kg for plums that are not selected for export. If you work with an importing company or trader, expect to pay around 8% commission plus handling costs.

It is nearly impossible to provide price indications beforehand. This can best be checked by collecting data at the time of export from different sources, for example, wholesale markets and preferably directly with importers.

Retail prices have little relation with trade spot prices and tend to be more stable, although promotions during the season can lead to significant price drops. European supermarkets charge between €2.50/kg and €6/kg for fresh plums. Special varieties, such as pluots, are sold in the higher range of €4.50 to €6.

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

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