

# The European market potential for frozen berries

In the long term, the European market for frozen berries is expected to show stable growth of around 4-5% annually. This growth is likely to be driven by changes in the consumption patterns of European consumers, particularly the popularity of smoothies as a convenient and healthy breakfast option. Also, industry users (primarily in dairy, bakery/pastry and beverages) are inventing new, innovative and healthy solutions with frozen berries as the main ingredient. Germany, France, the United Kingdom, Belgium, the Netherlands and Italy offer opportunities for developing country suppliers.

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## 1. Product description

Frozen berries are a range of products prepared by freezing fresh, clean, sound, stemmed and ripe berries. In botanical terms, berries are defined as fruit made by one ovary (currant, gooseberry, blueberry) or as a merger of several ovaries (raspberry, blackberry). Strawberry, which is also included in this report, is not botanically defined as a berry, as its fleshy part is not made of ovaries but from the receptacle that holds the ovaries. However, in common trade and culinary classifications, strawberry is also referred to as a berry.

When 'frozen berries' are referred to in this survey, it involves the selection of the products in the table below, unless stated otherwise.

The only optional ingredient allowed for frozen berries is sugar in the form of sucrose, invert sugar, invert sugar syrup, dextrose, fructose, glucose syrup or dried glucose syrup.

The quick-freezing process is not regarded as complete unless and until the product temperature has reached  $-18^{\circ}\text{C}$  at the thermal centre of the fruit after thermal stabilisation. Repacking quick-frozen berries under controlled conditions is permitted.

Quick-frozen berries can be presented as whole and free-flowing (individually quick frozen – IQF), non-free-flowing (in the form of blocks), crumbled (in the form of crushed berries), sliced (in case of strawberries) or a combination of crumbled and whole.

Table 1: Products in the product group of frozen berries

Combined Nomenclature Number	Product
08111011	Frozen sweetened strawberries with sugar content of > 13%
08111019	Frozen sweetened strawberries with sugar content of $\leq 13\%$

08111090	Frozen unsweetened strawberries
08112011	Frozen sweetened raspberries, blackberries, mulberries, loganberries, black, white or red currants and gooseberries with sugar content of > 13%
08112019	Frozen sweetened raspberries, blackberries, mulberries, loganberries, black, white or red currants and gooseberries with sugar content of =< 13%
08112031	Frozen unsweetened raspberries
08112039	Frozen unsweetened black currants
08112051	Frozen unsweetened red currants
08112059	Frozen unsweetened blackberries and mulberries
08112090	Frozen unsweetened Loganberries, white currants and gooseberries
08119050	Frozen European blueberries ( <i>Vaccinium myrtillus</i> )
08119070	Frozen Canadian blueberries ( <i>Vaccinium myrtilloides</i> and <i>Vaccinium angustifolium</i> )

Picture 1: IQF strawberry in export packaging

Picture 2: frozen raspberry crumble in export packaging





Picture 3: IQF blackberries in export packaging

Picture 4: IQF red currant in export packaging



## 2. What makes Europe an interesting market for frozen berries?

Europe is by far the largest importing region for frozen berries, accounting for a share of over 60% of global imports. European imports of frozen berries have increased by an average of 8.0% in volume per year over the period 2014-2018. Almost all imports from outside Europe come from developing countries (99.7%).

In the next five years, the European market for frozen berries is likely to increase with an annual growth rate of 7-10%. The main reason for the expected market growth is the fruits' popularity, due to perceived health benefits by European consumers. Berries are often promoted as a superfruit, and increasingly used in smoothies as a healthy breakfast option. An important user of frozen berries is the European fruit processing industry, especially jams, confectionery and fruit preparation producers.

Regular changes in import volumes will continue to be influenced by the harvested crop volumes and price situation, rather than changes in demand. As the market is largely dominated by the offer from Poland and Serbia, the harvested crop volumes in those two countries has a considerable influence on market size and prices.

Between 2014 and 2018, European imports of frozen berries grew every year by an average of 5.0% in value and 8.0% in volume to a value of €1.5 billion and a quantity of 935 thousand tonnes in 2018. Higher growth in volume than in value indicates a decrease in import prices over the last five years. More than 50% of these European imports is frozen strawberries.

Internal European trade accounts for 57% of all imports. Internal European trade consists of simple re-exporting of imported raw berries, but it also covers the production and supply of Poland, followed by Spain and Bulgaria. European imports from developing countries increased strongly, by 118 thousand tonnes over the last 5 years, from 236 thousand tonnes in 2014 to 354 thousand tonnes in 2018.

Note: the figure above represents apparent consumption of frozen berries (the difference between production, imports and exports). Exact data about consumption per country does not exist. Some data providers offer data of frozen berries retail sales, but this is only a small market segment, as industrial demand for frozen berries represents the lion's share of the market.

The total European market for frozen berries is estimated at nearly 500 thousand tonnes in 2018. The largest quantities are used by the fruit processing industry, while smaller shares are taken by retail and foodservice channels. Over the last five years, consumption has increased by an annual growth rate of 6.0%. Germany, France, the United Kingdom and Belgium are the largest markets for frozen berries. However, Belgium has positioned itself more as a trade hub. Belgium is home to several large frozen processing companies, and the majority of imported frozen berries are not sold within the country but re-exported or further processed.

European consumers are becoming increasingly aware of the health benefits of berries. They are often promoted as a superfruit, rich in antioxidants and other nutrients. Due to their very short shelf life, more berries are consumed as frozen than fresh. This is the case for both consumers (in smoothies, for example) and industry (for example in jams or in fruit preparation for bakery or dairy industry).

### **3. Which European countries offer most opportunities for frozen berries?**

As Europe's main importer and consumer of frozen berries, Germany is an interesting focus market. Germany also provides specific opportunities for organically certified frozen berries, as the leading organic market in Europe. Belgium and the Netherlands are also important trade hubs with significant re-export of imported frozen berries. Other European countries that are large net importers, consuming most of the imported frozen berries, are France, the United Kingdom and Italy.

#### **Germany: the largest European importer and consumer**

Germany is Europe's largest importer of frozen berries. The German import value was €371 million in total in 2018, good for 27% of total EU imports. German imports increased 6.7% in volume annually between 2014 and

2018, reaching 250 thousand tonnes.

Frozen strawberries are the #1 imported frozen berry product in Germany, accounting for 43% of frozen berry imports, followed by frozen raspberries with a 29% import share. The fastest growing import was frozen Canadian blueberry. It increased from 8.6 thousand tonnes in 2014 to more than 19 thousand tonnes in 2018.

The leading supplier in terms of quantity is Poland, accounting for a 33% share in 2018 (mainly frozen strawberries), followed by Serbia (mainly frozen raspberries). The strongest import growth over the last five years was recorded by Egypt (+35%; mostly frozen strawberries) and Canada (+21%; mostly frozen Canadian blueberries).

In 2018, one-third of frozen berries imports came from developing countries. Developing country suppliers gaining market share in Germany, apart from Egypt, are Morocco (frozen strawberries), Bosnia and Herzegovina (frozen raspberries), Turkey (frozen strawberries) and Ukraine (frozen raspberries and frozen wild European blueberries).

Consumption of berries in Germany has been boosted by the healthy eating trend. German consumers are increasingly using frozen berries for home preparation of smoothies and in breakfast cereals. In order to make preparing smoothies more convenient, some German companies have introduced ready-to-blend mixtures (Picture 4). One of the largest consumers of frozen berries is the jams and spreads industry (Picture 6). Examples of frozen berry retail brands in Germany include [Frosta](#) and [Jütro](#), but the majority of sales comes from private label brands.

German fruit ingredient companies are manufacturing a variety of products with frozen berries as key ingredient. Those companies are large users of frozen berries and they supply different market segments such as jams and spreads, dairy, bakery, beverages, ice cream, flavours and other food industries.

Picture 5: German brand of frozen fruit smoothie mixtures

Picture 6: German brand of raspberry jam







### Tips:

Find German traders of frozen berries on the websites of the specialised German Association - [Waren-Verein](#) and in the [German company directory](#) – Wer Liefert Was.

Keep up-to-date on the German frozen vegetable market through the smartphone application [dti Publikationen](#) developed by the German Frozen Food Institute (in German language only).

## France: a stable market dominated by the jams industry

France is Europe's second-largest importer and consumer of frozen berries. The French import value was €191 million in total in 2018, good for 13% of total EU imports. French imports increased annually by 0.6% in volume between 2014 and 2018, reaching 108 thousand tonnes.

Like in Germany, frozen strawberries are the most imported berry. Strawberries account for 46% of imports, followed by frozen raspberries, with a 28% import share. Products that gained market share in France over the last five years were sweetened frozen strawberries with sugar content over 13%, frozen Canadian blueberries and frozen white currants. Import of frozen sweetened strawberries almost doubled, from 4.5 thousand tonnes in 2014 to 8.6 thousand tonnes in 2018. This product is mainly used as an ingredient by the French jams industry.

France's leading supplier in quantity is Morocco, followed by Poland and Serbia. The strongest import growth over the last five years was registered by blueberries from Canada (+20%, from 2 thousand tonnes in 2014 to 4 thousand tonnes in 2018).

In 2018, France imported 30% of its frozen berries from developing countries. The leading developing country supplier is Serbia, followed by Morocco, Egypt and Chile. The developing country supplier gaining the market share most intensively is Turkey. French import of frozen berries from Turkey has increased from only 129 tonnes in 2014 to more than one thousand tonnes in 2019.

The largest consumer of frozen berries in France is the jams industry. France is the largest producer of

strawberry and raspberry jams in the world. This sector is represented by brands such as [Andros](#), [Bonne Maman](#) (brand owned by Andros), [St Dalfour](#) and [Confitopote](#). Another large consumer is the bakery industry, which uses berry fruit preparations as fillings for pastries, cakes and other products. Those fruit preparations are made by specialised companies, such as [Valade Groupe](#) or [Ponthier](#).

Frozen berries are increasingly being used for the home preparation of smoothies. Because of that trend, producers are increasingly making ready-to-blend smoothie mixtures, such as the [smoothie mixtures](#) of the leading French retailer Carrefour. Private label products dominate retail sales of frozen berries.

### Tips:

Find a list of French frozen fruit companies on the [member directory](#) of UNILET.

If you are not from French-speaking country, consider investing in French-speaking staff for easier access to the French market for frozen fruit.

## The United Kingdom

The United Kingdom is the third-largest frozen berries market in Europe. Belgium, the Netherlands and Poland import larger quantities of frozen berries compared to the United Kingdom, but they re-export most of the imported quantities. As a result, the United Kingdom is a more attractive market, as the majority of imported frozen berries are consumed within the United Kingdom. In 2018, imports reached almost 45 thousand tonnes, and consumption is estimated at 40 thousand tonnes.

Imports increased annually by 5.2% in value and 6.6% in quantity between 2014 and 2018. The share of imports from developing countries was 41% in 2018, which is higher than most other leading importers. Poland (frozen strawberries) and Serbia (frozen raspberries and blackberries) are the main frozen berries suppliers to the United Kingdom, together accounting for 50% of the total supply. The developing country supplier with the highest growth was Serbia, increasing exports from 3,000 tonnes in 2014 to more than 9,000 tonnes in 2018.

The fruit processing industry uses most of the imported frozen berries. Some examples of large industry users of frozen berries include jam brands such as [Hartley's](#), [Bonne Maman](#) or [Mackays](#), and producers of fruit preparations for the dairy, ice cream and bakery industries (such as [FDL](#) or [Puratos](#)). One of the favourite ingredients of jams producers is frozen black currant, which is also reflected by the fact that the United Kingdom is the second-largest importer of black currants in Europe.

Consumption of frozen berries is rising as a result of the increasing consumption of smoothies. The retail segment is almost fully dominated by private label brands, as there is hardly any independent brand with significant frozen berries market share. As a result, innovation in the shelves comes from the private label brands, such as 'ready-to-blend' mixtures by [Love Smoothies](#) or [Pack'd](#). The British retail chain Waitrose has also developed [LoveLife](#) smoothie mixtures in cooperation with frozen food company Ardo UK.

### Tip:

Learn more about frozen berries in the UK market by visiting the website of the [British Frozen Food Federation](#).

## Belgium: trade hub for frozen berries

Belgium is a very concentrated market for frozen berries, as the country is home to a small number of very large importers (and European market leaders), such as [Crops](#), [Greenyard Frozen](#) (Penguin Foods) or [Ardo](#). Specialised Belgian frozen food companies act as re-exporters, processors and suppliers of food retail, food service and industry segments across Europe. Around 65-70% of all imported frozen berries to Belgium is re-exported to other European countries every year.

Imports of frozen berries to Belgium increased annually by 2.2% in value and 2.0% in quantity between 2014 and 2018. The share of imports from developing countries was 21% in 2018. The Netherlands is the leading supplier (as a transit country), followed by Morocco, Poland and Serbia. The country gaining the most in market share is Canada, with an increase in exports of frozen blueberries to Belgium (although quantities are still much smaller than frozen strawberries or raspberries).

Typically, frozen unsweetened strawberries account for around 40% of the market, followed by frozen unsweetened raspberries with a 30% share. However, this market structure changed temporarily in 2018, with a large volume of frozen sweetened strawberries being imported from Spain. Developing countries suppliers gaining in market share in Belgium are Bosnia and Herzegovina and Ukraine (but both still with small exported quantities).

Retail sales of frozen berries in Belgium are led by the private label sales of supermarket chain [Delhaize](#). One of the drivers for the increased consumption of frozen berries is home preparation of smoothies and the development of smoothie bars. One of the leading suppliers of frozen smoothie solutions in Belgium is [Crops](#). Crops is even organising lectures to produce innovative smoothie flavours in their development centre in Ooigem (so-called 'Smoothie Academy').

Industrial demand comes from jams and spreads producers such as [Materne](#), [Belberry](#), [Nutrition & Santé](#) or Unilever Belgium (Effi brand) and fruit preparation producers such as [Greenyard Prepared](#).

## Italy: leading market for North African frozen strawberries

Characteristic for Italy is that its imports of frozen strawberries are mostly from North Africa. It imports most frozen strawberries from Egypt, followed by Morocco. At the same time, the supply from Poland, which is the dominant supplier to most European countries, accounts for only a 12% share.

Another characteristic of the Italian market is the large import share of frozen wild European blueberries. Frozen blueberries account for more than one quarter of total Italian imports of frozen berries. They are mainly imported from Romania and Cyprus, followed by the Netherlands (as a transit country), Lithuania, Ukraine and Latvia.

Large Italian users of frozen berries are jams and fruit preparation producers such as [Zuegg](#) or [Menz & Gasser](#). Private labels of Italian supermarket chains dominate retail sales. Examples of independent brands include [Asiago Food](#) and [Bosco Buono](#) (Green Ice company, part of Eurofood group).

## The Netherlands: re-exporter of frozen berries

The Netherlands has experienced strong import growth of frozen berries. The annual import growth rate was 8.0% in value and 10% in volume between 2014 and 2018. Dutch import of frozen berries reached 100 thousand tonnes, good for €141 million, in 2018. Frozen strawberries account for 50% of imports, followed by frozen raspberries (12% share) and frozen European blueberries (10% share). Frozen Canadian blueberries and sweetened frozen strawberries experienced strong import growth.

In 2018, the Netherlands' leading supplier of frozen berries was Poland, followed by Belgium, Morocco and Spain. The fastest-growing developing country supplier is Serbia (with mainly frozen raspberries and blackberries), but Serbia's share is still small compared to other leading suppliers (3.0%).



The Netherlands mainly acts as a re-exporter of frozen berries to other European markets. In 2018, the Netherlands exported 73 thousand tonnes of frozen berries. As a share of imports this was 70%. Main destinations were Germany (20 thousand tonnes), Belgium (14 thousand tonnes) and France (12 thousand tonnes), followed by Austria, Italy and Poland (each between 3–5 thousand tonnes).

Similar to other European countries, consumption of frozen berries in the Netherlands has been boosted by the healthy eating trend and the popularity of smoothie bars across the country.

### **Tips:**

See our study on [Market Statistics & Outlook for Processed Fruit and Vegetables](#) for more information on general trade developments within the European processed fruit and vegetables sector.

Check relevant trade statistics with the tools of ITC [TradeMap](#) or [Trade Helpdesk](#).

## **4. What trends offer opportunities on the European frozen berries market?**

The increasing popularity of smoothies as a healthy breakfast option, combined with the large industrial demand, are the leading drivers of the growing interest in frozen berries in Europe. With the growing popularity of vegan diets, convenient and easy to prepare food, and functional ingredients, the demand for frozen berries as ‘superfruits’ is growing.

To find out more about general trends, read our study about [Trends on the European Processed Fruit and Vegetables Market](#).

### **Popularity of smoothies**

Smoothies are a relatively new type of drink. Smoothies can be defined as a blended fruit purée with a thick, smooth texture, often with added milk, yogurt or fruit juice. Smoothies have become a very popular option for breakfast in Europe, or a kind of healthy liquid snack between main meals. One of the favourite ingredients in smoothies is frozen berries. The berries are often described as a ‘superfruit’ because of the high level of antioxidants and other nutrients. The possibility to add many different functional ingredients (such as nuts, fibres, supplements, kefir, yogurt, etc.) makes smoothies the preferred breakfast meals for many European consumers.

Apart from the healthy eating trend, smoothies are a very convenient breakfast solution for home preparation, as they do not necessarily take a lot of time to prepare. Many European frozen fruit companies are launching ‘ready to blend’ frozen fruit mixtures, offering reduced preparation times. Also, many celebrity chefs are promoting new smoothie variations through TV shows or popular cookbooks. The innovation created by the Belgian companies Alberts and frozen fruit supplier Greenyard – [smoothie machine](#) - is aimed to support out-of-home consumption of smoothies. Recently, a leading Belgian supermarket installed several vending machines in Belgium as part of a larger trial.

The global market for smoothies is expected to grow by an average annual growth rate of between 8-10% until 2021. One of the trends supporting this outlook is the decreased consumption of sugars. Smoothies can be produced with a lower average sugar content than fruit juices. The lower sugar content is achieved by adding water or milk to smoothies (this also gives a drinkable consistency to smoothies). European legislation prohibits the addition of water to fruit juices, which makes smoothies more attractive.

## New product developments in line with healthy food trends for many segments

Frozen berries are used as an ingredient in many different industries, such as jams, bakery, pastry, dairy or ice cream. Sometimes they undergo further processing to make a specific fruit preparation. Many of the companies from the aforementioned segments are launching new products to attract consumers. At ANUGA 2019, there were 59 new products containing strawberry as an ingredient, 38 new products with raspberry and 25 new products with blueberries. Several of those innovations are using frozen berries as ingredients. Some examples include:

- Production of jams with more fruit and less sugar. Frozen berries are a top ingredient in the European jams and fruit spread industry. As jam consumption is decreasing in Europe due to the high sugar content, jam producers are finding ways to decrease the sugar content in their jams. Examples: [less sugar more fruit jams](#) or [light, diabetic-friendly jams](#).
- Fruit preparation combinations for fruit yogurts. Specifically, designed fruit preparations for drinkable and spoonable yogurts are increasing in line with health trends. Example: [lactose-free and protein-rich strawberry yogurt](#).
- Ice cream producers are making innovative flavours with berries (especially strawberry) as the primary ingredient. New ice cream solutions are also following health trends, and there is a growing number of vegan and no added sugar ice cream launches. Examples: [no added sugar natural strawberry ice cream](#), [Organic Protein ice cream](#), [probiotic raspberry ice cream](#), [100% fruit ice creams](#)
- Innovative bakery ingredients. Traditional bakery fruit fillings were sometimes made with milk as creamy ingredients. Now, bakery fruit preparation producers are introducing new vegan and convenient solutions. Examples: [vegan strawberry slices](#) and [frozen raspberry and strawberry discs for tartlets](#).
- New freezing technologies allow the production of frozen berries with almost the same texture, flavour and quality as fresh fruit, without needing to add preservatives. One example is the offer of [Nice Fruit](#).

Picture 7: Raspberry discs for tartlets



Picture 8: 100% fruit ice creams





## Organic frozen berries

Demand for organic frozen berries is increasing, in line with the growth of organic food in general. The largest market for organic food in Europe is Germany, with estimated retail sales value of €11 billion in 2018. The share of organic food in Germany in total food sales has increased from 3.7% in 2010 to 5.3% in 2018. Denmark is the European country with the highest share of organic products in total food sales (more than 13% in 2018).

Leading suppliers of frozen berries are investing in [organic certification](#). In order to have full traceability and full control over the production process, processors are increasingly supporting farmers with the advice necessary for organic production and engaging agronomists in the field.

An example of a successful organic frozen berry company is the Serbian company [Frikos](#). Founded in 2000, after eight years, the company decided to invest in organic production. As the majority of berry crops are collected from hundreds of small-scale farmers, Frikos has engaged agronomists specialised in organic production to train producers and provide them with the advice necessary to produce organically. Close cooperation with farmers resulted in organic yields that are on the same level as conventionally produced yields, but at a premium price paid to the farmers involved. Their long-term cooperation with farmers has made Frikos one of the leading suppliers of organic raspberries in Serbia.

## New sourcing destinations

Large European frozen berry producers and ingredient users are expanding into new sourcing destinations. For example, French multinational company [Danone](#) has invested in spreading production of berries in new areas in Mexico. Many other food brands have similar development programmes, and are starting to explore new sourcing destinations such as Bosnia and Herzegovina (raspberries), Ukraine (raspberries, blueberries), Egypt

(strawberries), or Peru (blueberries).

### Tips:

Suggest new product developments such as smoothie combinations or new flavours to your buyers. European buyers of frozen berries are constantly looking for innovations to increase their sales.

Support mentioned innovations in the sectors that use frozen berries as ingredients in your own market (jams, ice creams, fruit preparations, etc.) while still supplying raw material to the EU market.

Promote the various applications and nutritional properties of berries. However, avoid health or nutritional claims that are not substantiated by scientific evidence.


Read the [CBI Trends in Processed Fruit & Vegetables](#) to learn more about the general market trends and developments that are shaping European processed fruit and vegetables markets.

Check the websites of European trade shows and exhibitions to discover the newest trends. The most important trade fairs in Europe that are relevant to frozen fruit and vegetables are [SIAL](#) (France, every even year in October), [Anuga](#) (Germany, every uneven year in October) and [BioFach](#) (Germany; organic products, every year in February).


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

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