

The European market potential for dried tropical fruit

In the medium to long term, the European market for dried tropical fruit is expected to show stable growth of 5-6% in volume annually. This growth is likely to be driven by changes in the consumption patterns of European consumers, including rising demand for healthier snacking options and a decrease in the consumption of sweet snacks. The United Kingdom, Germany, France, the Netherlands, Belgium and Italy offer opportunities for developing country suppliers.

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1. Product description

Dried tropical fruit is the product prepared from ripe fruit that is native to or grown in tropical regions (climatic zone surrounding the equator), processed by drying, either by the sun or other recognised methods of dehydration, with or without added sweetening agents (such as cane sugar) and food additives. Another method is to soak the fruit in syrup before drying, creating a very sweet, shelf-stable product. This is widely done for soft fruit, such as papaya and pineapple.

In some production methods (such as for banana chips), the product is not actually dried but fried in hot oil, like in the production of potato chips. Another characteristic of banana chips is that the raw material used is not ripe but green fruit. However, bananas and plantains in Europe are also increasingly being sold as naturally dried with a small addition of flour to avoid stickiness.

Depending on the species and variety, dried tropical fruit can be cut into different shapes. The most common are halves, slices, pieces, spears, chunks or cubes.

The most popular dried tropical fruit in Europe include dried bananas, mangoes, pineapples and papayas. However, other types of dried tropical fruit are also becoming popular, such as guavas, carambola (star fruit), durian, rambutan, passion fruit, jackfruit and pitahaya.

Dried tropical fruit is used at home, as a snack or cooking ingredient, elsewhere in hotels, restaurants and other places, and in the food industry, such as in bakery and confectionery products, or in breakfast cereal mixtures.

This study covers general information regarding the market for dried tropical fruit in Europe that is of interest to producers in developing countries. Desiccated coconuts and dates are not part of this study. Coconut belongs to the nut family (and not fruit), while dates are not tropical but sub-tropical fruit. For more specific information about these two products, see our studies on [Desiccated Coconut](#) and [Dates](#).

Please see table 1 for the specific products and the product codes used for statistical analysis. Note that the range of dried tropical fruits is wider than statistical analyses can show (for example, dried mangoes and dried pineapples do not have specific statistical codes).

Dried fruit preserved by sugar (candied or crystallised fruit) is not included in the extensive statistical analysis. Dried mangoes and dried pineapples are also excluded from yearly statistical analyses, due to the absence of relevant statistical codes, but are included in the estimations and qualitative analyses.

Table 1: Products in the product group of dried tropical fruit

Combined Nomenclature Number	Product
08134065	dried tamarinds, cashew apples, lychees, jackfruit, sapodillo plums, passion fruit, carambola and pitahaya
08134050	dried papayas
08039090	dried bananas
08031090	dried plantains

Picture 1: Banana (plantain) chips

Picture 2: Dried pineapple



Picture 3: Sugar-infused dried papaya

Picture 4: Dried passion fruit



Source: Max Pixel, Pixabay, Flickr, Max Pixel

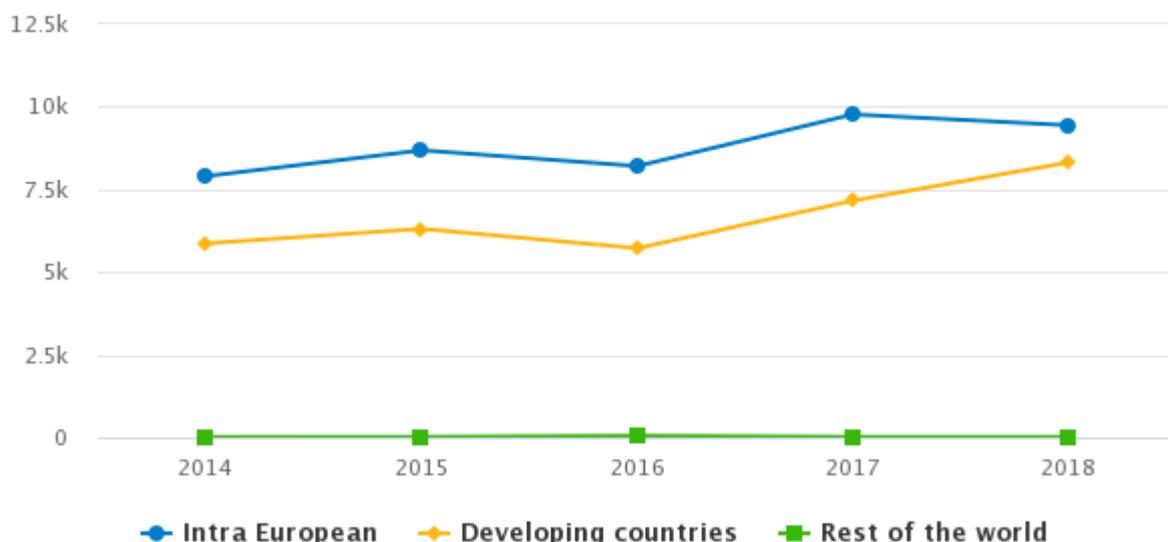
2. What makes Europe an interesting market for dried tropical fruit?

European imports of dried tropical fruit have increased by an average of 7% in volume in the period 2014-2018. Virtually all of the imports from outside Europe come from developing countries. In the next five years, the European market for dried tropical fruit is likely to increase with an annual growth rate of 6-9%. Regular

fluctuations in imports will continue to be influenced by harvested crop volumes and price fluctuations rather than changes in demand.

Figure 1: European imports of dried tropical fruit , by origin without dried mangoes and pineapples

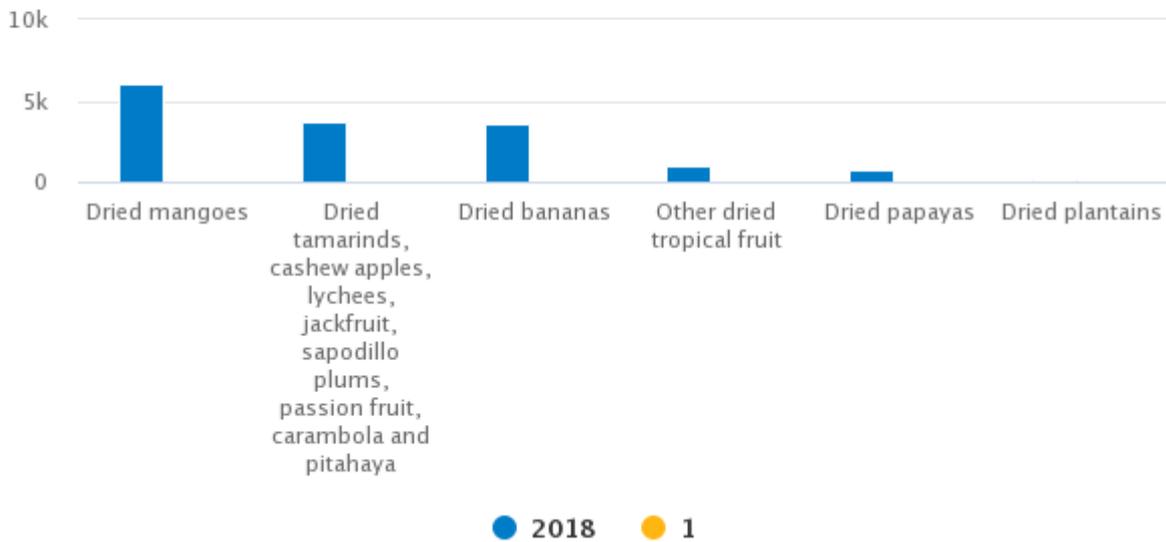
in tonnes



Source: Eurostat

Between 2014 and 2018, European imports of dried tropical fruit grew every year by an estimated average of 14% in value and 7% in volume to a value of €95-100 million and a quantity of around 30 thousand tonnes (including intra-European trade) in 2018. The direct import volume from developing countries is around 15 thousand tonnes, which means that about 50% of the imported dried tropical fruit is re-exported within Europe. As Europe does not produce tropical fruit, consumption is equal to the estimated import volume - around 15 thousand tonnes.

Figure 2: Estimated European import of dried tropical fruit by product
in tonnes



Source: Eurostat and author estimations

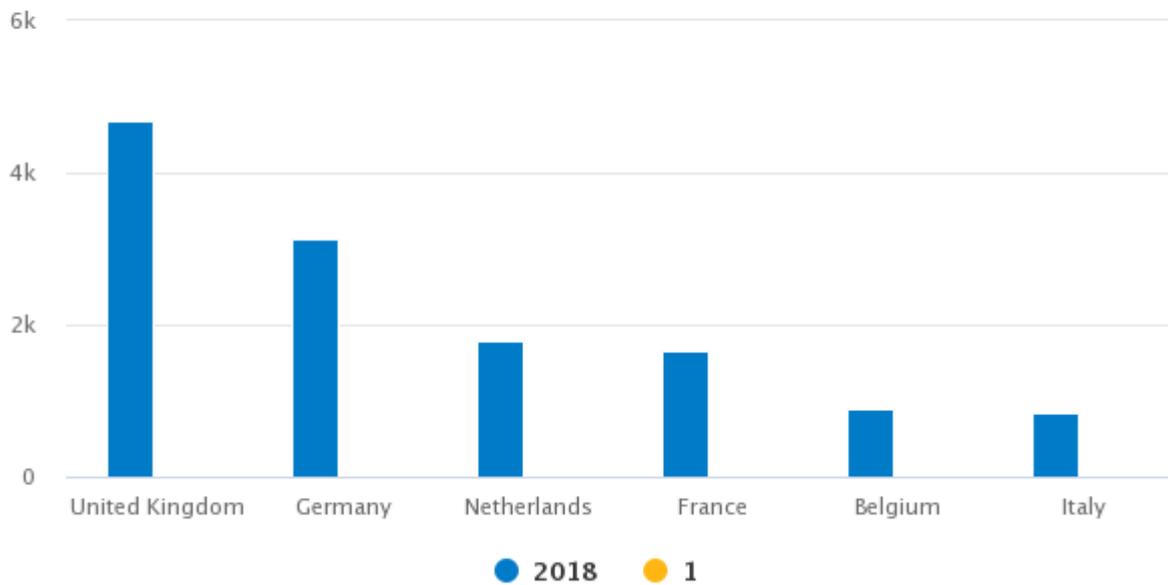
The higher import growth rate in value than in volume indicates that import prices have increased. However, prices are expected to stabilise, especially for dried mangoes. Expected overproduction of dried mangoes (especially in Burkina Faso) should lead to a price decrease. Import of dried mangoes accounts for around 40% of total European imports of dried tropical fruit (Figure 2).

3. Which European countries offer most opportunities for dried tropical fruit?

As Europe's main importer of dried tropical fruit, the United Kingdom is an interesting focus market. Germany also provides specific opportunities, especially for organically certified dried tropical fruit. Other interesting markets are France, the Netherlands, Belgium and Italy.

Figure 3: Main European importers of dried tropical fruit

in tonnes



Source: Eurostat and author estimations

The United Kingdom: the largest European importer

The United Kingdom is the largest European importer and market of dried tropical fruit within Europe. Imported quantities are mainly consumed within the country, with very small re-exports. Total consumption is estimated at more than 4.5 thousand tonnes. Consumption of dried tropical fruit in the United Kingdom is driven by the healthy snacking trend and by the attractive taste of exotic fruit perceived by final consumers. Dried tropical fruit is also increasingly being used as an ingredient in breakfast cereals and fruit bars.

Leading suppliers of dried tropical fruit to the United Kingdom are the Philippines (Carabao dried mangoes, banana chips), Burkina Faso (organic dried mangoes), Ghana (dried pineapples, dried mangoes), Thailand (dried pineapples, dried tamarinds), Ecuador (banana chips), South Africa (dried mangoes) and India (dried tamarinds).

A specific characteristic of the UK market is the popularity of the carabao mango variety from the Philippines. While other European markets predominantly use other varieties of dried mangoes (such as Kent, Keitt, Tommy Atkins), UK companies are popularising the carabao variety as superior compared to others and sell it for higher prices. Another specific characteristic is the country's sourcing destination preference for imported dried bananas. While almost all European importers source dried bananas mainly from Ecuador, the UK imports the largest quantities from Uganda and the Philippines.

Picture 5: Example of a tropical dried fruit brand in the UK

Picture 6: Example of a fruit bar with dried mangoes in the UK



The majority of dried tropical fruit in the United Kingdom is sold as a snack. The largest market shares are held by the private labels of retail chains such as [Tesco](#), [Sainsbury's](#), [ASDA](#), and [Morrisons](#). Retail chains are commonly supplied via local packing and European brand companies and they rarely import retail-ready products directly from developing countries.

Leading brands selling dried tropical fruit include [Whitworths](#), [Forest Feast](#), [Crazy Jack](#) and [Tree of Life](#). Dried tropical fruit is also increasingly being used as an ingredient in fruit bars (for example [Fruit Doctor](#)) and in breakfast cereals (for example [Dorset cereals](#)). Innovative dried tropical fruit snack products include [fruit rolls](#) and [crispy fruit snacks](#).

The United Kingdom market offers specific opportunities for suppliers of FairTrade-certified dried tropical fruit, as the country is the largest Fairtrade products market in Europe. There are currently around 5,000 Fairtrade-certified products on sale in the UK.

Tip:

Stay up-to-date with the dried tropical fruit market in the United Kingdom from the [National Dried Fruit Trade Association UK](#).

Germany: a huge and growing market

Together with the United Kingdom, Germany represents half of the European market for dried tropical fruit. Germany is a fast-growing market. Some types of dried tropical fruits (such as dried natural mangoes or dried bananas with no added sugar) have experienced very high market growth. Until a few years ago, those products were sold mainly in specialised stores, but they are now being sold even in big discounters such as Aldi or Lidl. Sales of dried tropical fruit in Germany are forecast to increase at a high growth rate. In the medium to long term, sales in the German market will reach the same values as in the United Kingdom.

Germany is a particularly attractive market for organic dried tropical fruit, as the country is the largest European market for organic food. Also, sales of sugar-free and preservative-free dried tropical fruit are increasing. One of the market segments offering specific opportunities for suppliers of dried tropical fruit is the fruit bar segment. There is an increasing number of fruit bars product launches that contain dried tropical fruit. Examples include [Lubs](#), [Alnatura](#), [DM](#). However, note that some of the fruit bars are produced from fruit purees and not from dried fruit.

Examples of German dried tropical fruit brands include [Seeberger](#), [Farmer's Snack](#), [Kluth](#), or [MorgenLand](#). Apart from snacks and previously mentioned fruit bars, dried tropical fruit is an important ingredient of breakfast cereal mixtures. Still, the usage of sugar-infused dried tropical fruit in breakfast cereals is larger than the application of natural dried tropical fruit. However, dried fruit without added sugar is expected to overtake sugar-infused fruit in breakfast cereals in the near future.

Tip:

Find German traders of dried tropical fruit on the websites of the specialised German Association - [Waren-Verein](#) and in the [German company directory](#) - Wer liefert was.

The Netherlands: the largest European importer of dried bananas

In terms of imported quantities, the Netherlands is the third-largest importer of dried tropical fruit in Europe. However, it is estimated that at least 70% of all imported dried tropical fruit is re-exported to other European destinations. The largest destination for the Dutch re-export is Germany, followed by France.

The growing consumption of dried tropical fruit in the Netherlands is driven by the healthy snacking trend and the popularity of 'exotic' flavours. Apart from snacking, dried tropical fruit is increasingly being used as an ingredient in fruit bars, bakery and confectionery products and breakfast cereals. The Netherlands is characterised by a high import share for sugar-infused dried tropical fruit (such as sweetened pineapples and papaya), especially from Thailand. The share of sugar-infused dried tropical fruit is expected to decrease, and no-added-sugar products are expected to gain market share.

The Netherlands is the largest European importer of dried bananas (banana chips), with Ecuador as the leading supplier. In 2018, the Netherlands imported 1.8 thousand tonnes of dried bananas, which accounts for 50% of total European imports. More than 90% of imported dried bananas are then re-exported to other European destinations, with Germany as the leading target market.

More than 90% of all locally traded dried tropical fruit is sold by private labels of supermarkets such as [Albert Heijn](#), [Jumbo](#), health retail chains such as [Holland & Barrett](#) or discounters such as [Lidl](#).

The import volume of organic tropical fruit in the Netherlands is relatively high and led by one of the largest

European specialised organic importers, [Tradin Organic](#) (organic dried bananas, mangoes and papayas). Examples of organic-only brands with a range of dried tropical fruit are [Smaakt](#), [Lucy Superfood](#) and [Horizon](#).

France: fast-growing and ethically aware market

France is one of the fastest-growing markets for dried tropical fruit, with an estimated growth rate of 15% per year over the last five years. France is especially an attractive market for French-speaking suppliers of dried tropical fruit from West Africa (such as Burkina Faso and Ivory Coast).

Private label brands of big retailers (such as Carrefour or Auchan) are very strong in sales of dried tropical fruit in France. Leading independent private brands include [Maître Prunille](#) and [Brousse Vergez](#). Some of the brands that have a strong presence in the organic segment include [Juste Bio](#) and [Daco Bello](#). Dried organic fruit is mostly used in breakfast muesli. However, some breakfast cereal producers use tropical fruit from freeze-dried purees instead of dried tropical fruit.

A lot of dried tropical fruit is imported to France through the Netherlands, but an increasing number of companies are now sourcing dried tropical fruit directly from producing countries. Those companies are investing in ethical sourcing and trying to help local communities in developing countries. Examples of such companies are [Agro Sourcing](#) and [Direct Producteurs Fruits Secs](#).

Tips:

Contact the [French association for research in the fruit and vegetable sector](#) (CTIFL) to learn more about the French market.

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

Belgium: importing from the Netherlands

Dutch companies supply significant quantities of dried tropical fruit. This situation could provide opportunities for companies from developing countries to directly supply the Belgian market. Direct developing country suppliers to Belgium are Cameroon, the Philippines, India, Burkina Faso (dried mangoes), Thailand and Ghana. The share of dried tropical fruit with added sugar is still higher than in most other European markets.

Retail sales of dried tropical fruit in Belgium are led by the private labels of supermarket chain [Delhaize](#). The market share of independent brands is small. Examples of independent brands are [Bonner](#) (dried mango), [Adya](#) and [Nuts About Nuts](#). Ethical sourcing is important for Belgian importers, and some companies are investing in sourcing destinations such as [Jua](#) (which contributes 10% of sales to charity for sustainable projects in Uganda) or Fair Trade company [Oxfam-Wereldwinkels](#).

Tips:

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

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

Italy: growing imports and re-exports

Italy is increasing its import of dried tropical fruit. Dried tropical fruit is mainly consumed as snacks in Italy. Sales are dominated by private labels by supermarkets such as Coop, Conad or Carrefour. A very popular way of selling dried fruit is in small discount packages of €1 per package (for 100 g of dried fruit). The leading independent brand is [Noberasco](#), but there are more brands such as [Semplicemente frutta](#) (by Euro company), [Life](#) or [Ventura](#).

Italy exports significant quantities of imported dried tropical fruit to other European countries. This re-export is led by the presence of strong brands (such as [Noberasco](#)) in other European countries and the presence of strong Italian traders (such as [Besana](#)).

4. What trends offer opportunities on the European dried tropical fruit market?

The increasing demand for healthy snacking combined with product innovation are the leading driving forces behind the growing consumer interest in dried tropical fruit in Europe. Also, sustainable and ethical production is becoming an important aspect for European traders and consumers.

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

Healthy snacking

A major trend that is in line with increased consumption of dried tropical fruit is healthy snacking. Consumers are searching for healthier alternatives for snacking between meals or even for snacks that can replace meals in full. Younger consumers who are taking more care of their general health and wellbeing no longer favour savoury snacks such as potato chips and other crisps. As a result, nuts and dried fruit are becoming increasingly popular as snacks.

Consumers are increasingly looking for flexible, light and convenient snacking options that they can eat on the go. According to a research by market research firm IRI, analysis of six markets – the UK, France, Germany, Italy, Spain and the Netherlands – showed that consumers are [opting for healthier or lighter products](#). With their busy lifestyle, European consumers are replacing traditional lunch breaks with healthy snacking moments.

Clean label

Especially important for consumers are 'clean labels' on dried fruit packs. 'Clean' means that there are no additives used during the production process. Popular labels for dried tropical fruit packs are organic, gluten-free, sugar-free, 'nothing added', 100% fruit and similar. One of the new trends is production of additive-free dried tropical fruit. The main additives used to preserve the intense original fruit colour are sulphites. Producers that don't apply sulphites often use the claim 'sulphur-free'. The problem connected with 'sulphur-free' products is darkening of the fruit, which makes the fruit less appealing to consumers.

According to Innova Market Insights, a sharp growth occurred in 'low sugar' (+48% in 2018), 'sugar-free' (+35%), and 'no added sugar' (+29%) labels, which was largely driven by the rise in natural fruit snacks.

Innovative processing technologies and products

Freeze-drying technology, consumption of fruit and bars, new breakfast options and innovative snacking products are some of the main influences on the dried tropical fruit market. During [ANUGA 2019](#) in Cologne (leading food exhibition), a lot of new products with dried tropical fruits were presented. Those include the following:

- Soft dried tropical fruit - Producers are starting to use rehydration (similar to the prunes production process) to increase water content in some types of dried tropical fruits and make them easier to chew. Examples:

[Frubis](#) soft dried mangoes and pineapples (Portugal), [Seeberger](#) soft mango (Germany) and [Rapunzel](#) organic soft dried mangoes (Germany).

- Fruit bars with tropical fruit – The popularity of fruit bars has increased across Europe over the last several years. The main reason is the natural sweetener function of dried fruit, allowing the making of sweet products without added sugar. Exotic fruit is a popular flavour in fruit bars, although fruit purees are often used instead of dried fruit. Examples: [Purafruta](#) banana, goldenberry, mango and pineapple bars (Switzerland) or [MÄT](#) organic cocoa, mango and banana bars for children (Denmark). Purafruta is an example of the collaboration with a company from developing country that has successfully tapped into this trend. The Swiss company Fruit Group AG, in collaboration with the Colombian manufacturing and marketing company [Prime Foods](#), launched dried tropical fruit snack bars without additives to the European market in 2018. To follow the healthy snacking trend, the bars are made from pure fruit without flavour enhancers, without added sugar and without additives. To cover the entire European market, the information on the product packaging is presented in German, English and French.
- Fruit rolls, sticks and balls – these innovative fruit snacks are made by rehydrating fruit purees. Tropical flavours are popular and include examples such as [Tropics](#) (Switzerland) or [Sunvita](#) (Hungary).
- Fruit chips – apart from bananas, other tropical fruits gradually also appear in the form of chips. Example: [NSI](#) pitahaya and mango chips.
- Freeze-dried tropical fruit, such as [Lolo snacks](#) (Hungary) or [Giving Tree](#) (the United Kingdom).
- Breakfast cereals such as [Seedheart](#) (Germany) and [Veganz](#) (Germany).

Sustainability and ethical production

Several sustainability initiatives are already active in the dried tropical fruit production countries, several of which have already been mentioned in the previous chapters. These trends are approached in more detail in the [CBI processed fruit and vegetables trends study](#). Generally, consumers and retailers are increasingly interested in sustainably produced fruit products, including dried tropical fruit.

Some of the companies that focus on ethical production source their products from a specific country and via a project in the country. Sometimes, they have a partnership with a company from the sourcing country. One example of a European company that works like this is [Tropicks](#) from Switzerland. This company sells a range of dried tropical fruit from Ghana in several European countries, such as in the Netherlands

Tips:

Promote the various applications and nutritional properties of dried tropical fruit. However, avoid health or nutritional claims that are not substantiated by scientific evidence (nutritional analysis in case of nutritional claims). Check the [Health Research Database](#) of INC to find studies that have been published in scientific journals.

Read the [CBI Market Statistics and Outlook on Processed Fruit & Vegetables study](#) to learn more about the general trade trends and the size of specific market segments.

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 dried tropical fruits 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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