

Entering the European market for frozen vegetables

Food safety certification, combined with reliable and frequent laboratory testing helps create a positive image for frozen vegetable suppliers wishing to export to Europe. Emerging suppliers can reap additional advantages through sustainable production methods and the implementation of corporate social responsibility measures. The toughest existing competitors for new suppliers of frozen vegetables are European Union member states such as Poland or Spain. The toughest competitors outside of Europe are China and Turkey.

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1. What requirements must frozen vegetables comply with to be allowed on the European market?

In addition to the quality requirements mentioned in the section below, please refer to our study about [buyer requirements for processed fruit, vegetables](#) and edible nuts for a general overview of buyer requirements in Europe.

What are the requirements?

All foods, including frozen vegetables, sold in the European Union must be safe. Imported products are no exception. All additives must be approved. Harmful contaminants, such as bacteria or viruses, pesticide residues and excessive levels of heavy metals are prohibited. It should also be clear from the labelling whether a food contains allergens.

Border control

If specific products originating from particular countries are repeatedly in violation of the applicable regulations, stricter conditions may be imposed on the import of those products. For example, the products may have to be accompanied by a health certificate and analytical test report. Products from countries which have repeatedly breached the regulations are put on a list included in the Annex of Regulation [\(EC\) 669/2009](#). Since July 2019, the following frozen vegetables have been on the list of frozen vegetables subject to stricter inspection for the presence of pesticide residues:

Country	Products under stricter inspection
Dominican Republic	50% of all imported frozen sweet peppers, other peppers and yardlong beans
Vietnam	50% of imported frozen okra and 50% of imported chilli peppers
Cambodia	50% of imported frozen yardlong beans
Egypt	20% of imported frozen sweet peppers and other peppers

Pakistan	20% of imported frozen chilli and other peppers
Uganda	20% of imported frozen chilli and other peppers
India	10% of imported frozen okra and 20% of imported chilli peppers
Thailand	10% of imported frozen chilli and other peppers
Turkey	10% of imported frozen sweet peppers

Contaminant control in frozen vegetables

The [European Commission Regulation](#) sets maximum levels for certain contaminants in food products. This regulation is frequently updated. Apart from the limits set for general foodstuffs, there are a number of specific limits that apply to contaminants in specific products, including frozen vegetables. The most common requirements regarding contaminants in frozen vegetables relate to the presence of pesticide residues, heavy metals and micro-organisms.

Pesticide residues

The European Union has set maximum residue levels (MRLs) for pesticides found in and on food products. Products containing levels of pesticide residues exceeding the prescribed limit are withdrawn from the European market. The majority of European importers request extensive testing for the presence of a wide range of pesticides (sometimes more than 500).

Due to an increase in the number of these laboratory checks, the number of border rejections of frozen vegetables due to pesticide residues is decreasing. In 2018 and 2019, the [European Rapid Alert System for Food and Feed](#) (RASFF) recorded four cases related to high levels of pesticide residues in frozen vegetables (frozen peppers from Turkey, frozen spinach from Belgium and frozen chilli peppers from Vietnam).

The European Union regularly publishes [a list of pesticides](#) that are approved for use in the European Union. This list is frequently updated. In 2019, the European Commission adopted 12 new laws prescribing changes with respect to nearly 80 different pesticides.

Microbiological contaminants

One of the reasons for border rejections or market withdrawals of frozen vegetables from the European market, is the presence of micro-organisms such as listeria, salmonella or hepatitis A. In 2018 and 2019, RASFF recorded two cases of market withdrawals of frozen sweet corn infected with *Listeria monocytogenes* (one from Turkey and the other from Hungary). As of 8 June 2018, 47 cases of listeriosis had occurred, resulting in nine deaths. The source of the outbreak was initially attributed to frozen corn from a Hungarian processing facility, but the pathogen was later found in other frozen vegetables, as well.

Heavy metals

High lead or cadmium levels are sometimes found in frozen fruit or vegetables. The vegetable with the greatest sensitivity to heavy metals, particularly to the presence of cadmium, is spinach. The cadmium, which accumulates in the green spinach leaves, can come from the natural environment, such as the soil or from growing pots.

Tips:

Read more about MRLs on the European Commission's [website on maximum residue levels](#). To ensure you are prepared for potential changes in the MRLs, read the [ongoing reviews of MRLs in the European Union](#).

Follow the Codex Alimentarius [Guidelines to Control Listeria in Food](#).

What additional requirements do buyers often have?

Quality requirements

The basic quality requirements for frozen vegetables are:

- reasonably uniform colour, characteristic of the type of vegetable and variety
- clean, firm and free of foreign matter
- virtually free of pests and the associated damage
- free of peculiar flavours and odour, taking any added ingredients into consideration

Optional ingredients permitted in specific frozen vegetables are salt (sodium chloride), sugars, edible oils, aromatic herbs, stock or vegetable juices and vegetable garnishes up to a maximum of 10% m/m of the total drained vegetable ingredient.

Additional quality specifications regarding grading designation, cutting styles, defects and allowances are set out in the [Codex Alimentarius](#) standards for Quick Frozen Vegetables (for frozen carrots, frozen corn on the cob, frozen leeks and frozen whole kernel corn). Besides the annexes mentioned, separate standards are established for frozen peas, frozen spinach, frozen broccoli, frozen cauliflower, frozen Brussels sprouts, frozen green and wax beans and frozen French-fried potatoes.

Food safety certification

Although food safety certification is not obligatory under European legislation, it has become a must for almost all European food importers. Most established European importers will not work with you if you cannot provide some type of proof of food safety certification as the basis for the collaboration.

The majority of European buyers will ask for certification recognised by the [Global Food Safety Initiative](#) (GFSI). For frozen vegetables the most popular certification programmes are:

- [International Featured Standards](#) (IFS)
- [British Retail Consortium Global Standards](#) (BRCGS)
- [Food Safety System Certification](#) (FSSC 22000)

Please note that this list is not exhaustive and food certification systems are constantly under development. The majority of food safety certification programmes are based on existing ISO standards like [ISO 22000](#).

Although different food safety certification systems are based on similar principles, some buyers may prefer one management system in particular. For example, British buyers often require BRC, while IFS is more common for German retailers. It should also be noted that food safety certification is only a basis from which to start exporting to Europe, but reliable buyers will usually visit your production facilities.

Corporate Social Responsibility

Companies have different requirements as regards corporate social responsibility. Some companies will require

adherence to their code of conduct or to common standards such as the Supplier Ethical Data Exchange ([SEDEX](#)), Ethical Trading Initiative ([ETI](#)) or Business Social Compliance Initiative code of conduct ([BSCI](#)). If frozen vegetables are destined for the retail segments, suppliers will be asked to follow the specific code of conduct developed by the retailers themselves. [Lidl](#), [Rewe](#), [Carrefour](#), [Tesco](#) and [Ahold Delhaize](#), for instance, all have their own retail codes of conduct.

Packaging requirements

The most common types of packaging for frozen vegetables are polyethylene bags, cardboard boxes lined with foil and paper bags. The cardboard boxes are packed on Euro-pallets (80 x 120 cm), which are protected with polyethylene foil. Cardboard must be durable enough to keep its shape under the weight on the pallet during prolonged storage. Cardboard boxes are sealed with tape. The size of the packaging may vary according to the buyers' requests, but usually the size of the bulk packaging is between 10 kg and 25 kg.

Labelling requirements

The name of the food as it appears on the label should include the name of the vegetable and the words "quick-frozen" or "frozen" and the name of any additional ingredients used (i.e. with salt, spices etc.). The label should also include the style, as appropriate (for example: "IQF whole", "block", sized/unsized). If the frozen vegetables are cut, the cutting style should also be on the label (e.g. diced, halved, Julienne, trimmed, rings, chopped, etc.).

In the case of packaging for bulk export, the information described above can be provided in accompanying documents, instead on the packaging itself. However, "frozen or quick frozen (name of the vegetable)" and the name and address of the manufacturer or packer must appear on the packaging. In addition to the type of vegetable, the product specifications often also include the variety.

In the case of retail packaging, product labelling must comply with the European Union Regulation on [the provision of food information to consumers](#). This regulation specifies requirements for nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information) in more detail. The only vegetable which is included in the allergen list of the regulation is celery.

Tips:

Get food safety certification. Carefully select a certifying company and consult with your preferred buyers about their certification preferences.

Do a self-assessment using the producer starter kit via the [amfori BSCI website](#).

What are the requirements for niche markets?

Organic frozen vegetables

Organic frozen vegetables are in increasingly high demand in Europe. To market frozen vegetables as organic in Europe, they must be grown using organic production methods according to [European legislation](#). Growing and processing facilities must be audited by an accredited certifier, before you will be allowed to use the European Union's organic logo on your products. The same goes for the logo of the standard holder (for example the [Soil Association](#) in the United Kingdom and [Naturland](#) in Germany).

Note that importing organic products to Europe is only possible if you are in possession of an [electronic certificate](#) of inspection (e-COI). Each batch of organic products imported into the European Union has to be accompanied by an electronic certificate of inspection as defined in Annex V of Regulation [defining imports of organic products from third countries](#). This electronic certificate of inspection has to be generated via the [Trade](#)

[Control and Expert System \(TRACES\)](#).

Sustainability certification

For an overview of the developments regarding sustainability initiatives in the European market, read our study on [Trends on the European Processed Fruit and Vegetables Market](#).

Sustainability is a broad term with many aspects and there is still no internationally recognised sustainability certification covering all of them. The desire to achieve carbon neutrality and use recyclable packaging material are currently the most important aspects. One of the industry trends is the publication of CO2 emission rates on products, but it is very difficult to reliably assess those claims. However, some private certification schemes are under development. Currently, the most well-known certification schemes relate to environmental protection and ethical trade.

Although widely recognised, the [Fair Trade](#) and [Rainforest Alliance](#) certification schemes, are not used very frequently in the production of frozen vegetables. Fair Trade international has developed a specific standard for [prepared and preserved fruit and vegetables](#) for small-scale producer organisations, but few cases of frozen vegetable certification have been recorded. By contrast, a great many producers of fresh vegetables are FairTrade certified.

Ethnic certification

The Islamic dietary laws ([Halal](#)) and the Jewish dietary laws ([Kosher](#)) impose specific dietary restrictions. If you want to focus on Jewish or Islamic ethnic niche markets, you should consider implementing Halal or Kosher certification schemes.

Tips:

Consult the [Sustainability Map database](#) for sustainability labels and standards.

Check the [guidelines for imports of organic products into the European Union](#) to familiarise yourself with the requirements for European traders.

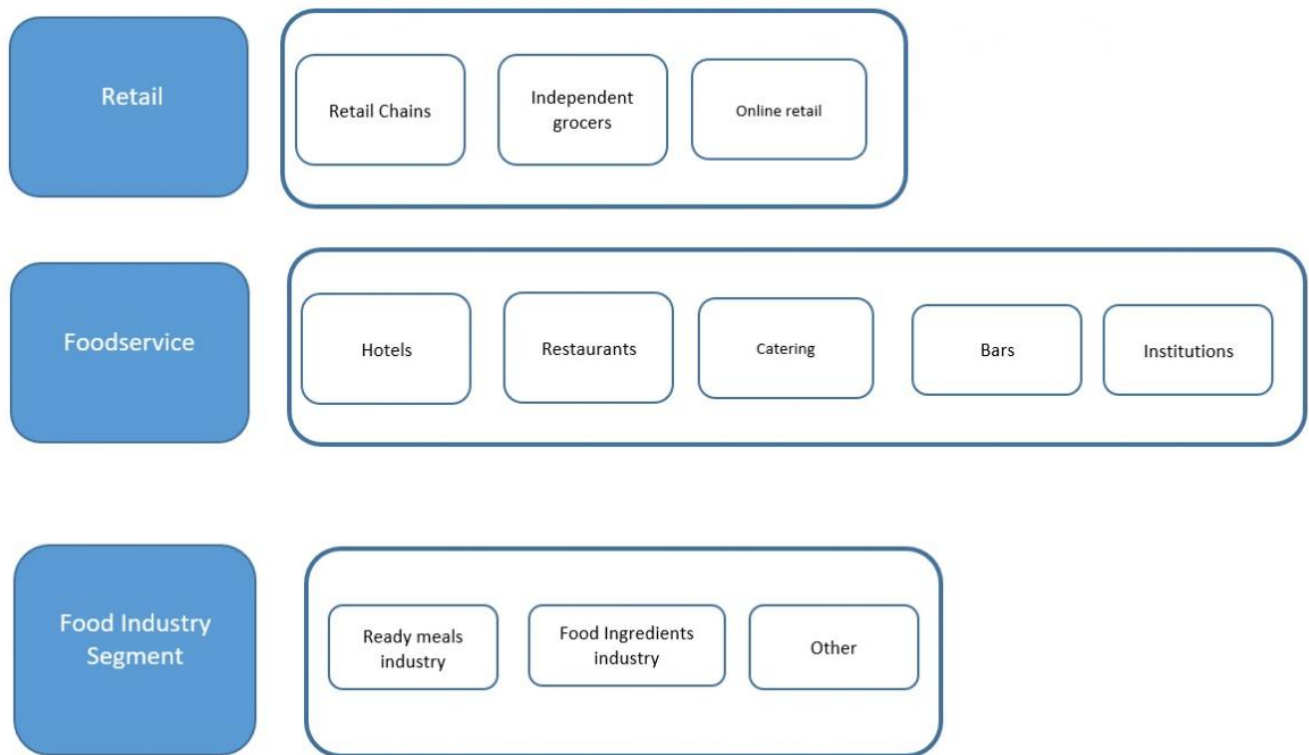
2. Through what channels can you get frozen vegetables on the European market?

Most of the frozen vegetables imported into Europe are repacked for sale under private labels, in brand packaging or to the foodservice sector.

How is the end market segmented?

The retail and foodservice industries are Europe's largest users of frozen vegetables, followed by the food processing industry (mainly producers of ready meals). No exact data is available, but together, the retail and foodservice industries use around 70% of the frozen vegetables. However, the prepared frozen meals industry accounts for an increasing share due to the growing demand for convenience food.

Figure 1: End market segments for frozen vegetables in Europe



Retail segment

Retailers sometimes buy directly from developing country exporters, but in most cases, they are supplied via intermediaries, such as packing companies, which place products in their final packaging. In the case of frozen vegetable mixtures, the products can either be prepared in the supplying country or are mixed by a packing company after importation.

Recently, the retail sector has become increasingly polarised, seeing a shift towards either the discount or high-level segment. Consolidation, market saturation, fierce competition, and low prices are key characteristics of the European retail food market. Currently, online retail sales of frozen vegetables account for an insignificant share of the market, but the online sales are forecasted to increase in the near future.

The leading food retail companies in Europe differ per country. The companies with the largest market shares are Schwartz Gruppe (Lidl and Kaufland brands), Carrefour, Tesco, Aldi, Edeka, Leclerc, Metro Group, Rewe Group, Auchan, Intermarché and Ahold (Delhaize, Albert Heijn and several other brands). In addition, there are several retail chains in Europe that specialise in the supply of frozen food such as [Iceland](#) (United Kingdom) or [Picard Surgelés](#) (France).

Foodservice segment

The foodservice channel (hotels, restaurants and catering establishments) is usually supplied by specialised importers (wholesalers). The foodservice segment often places specific demands on the packaging of frozen vegetables, which are different from the requirements for bulk or retail packaging (e.g. weights ranging from 1 kg to 5 kg). In addition, the frozen vegetables supplied to the food service sector often undergo further preparation, such as roasting/grilling or the addition of spices or other ingredients. Some wholesale companies specialise in the supply of the food service segments, such as German [Frosta Food Service](#), Belgian [Aronde](#) or the United Kingdom [Kiril Mischeff](#).

Food processing segment

Frozen vegetable sales are lower in the food processing segment than in the retail and foodservice segments. The main user of frozen vegetables in the food processing segment is the prepared food industry. The frozen

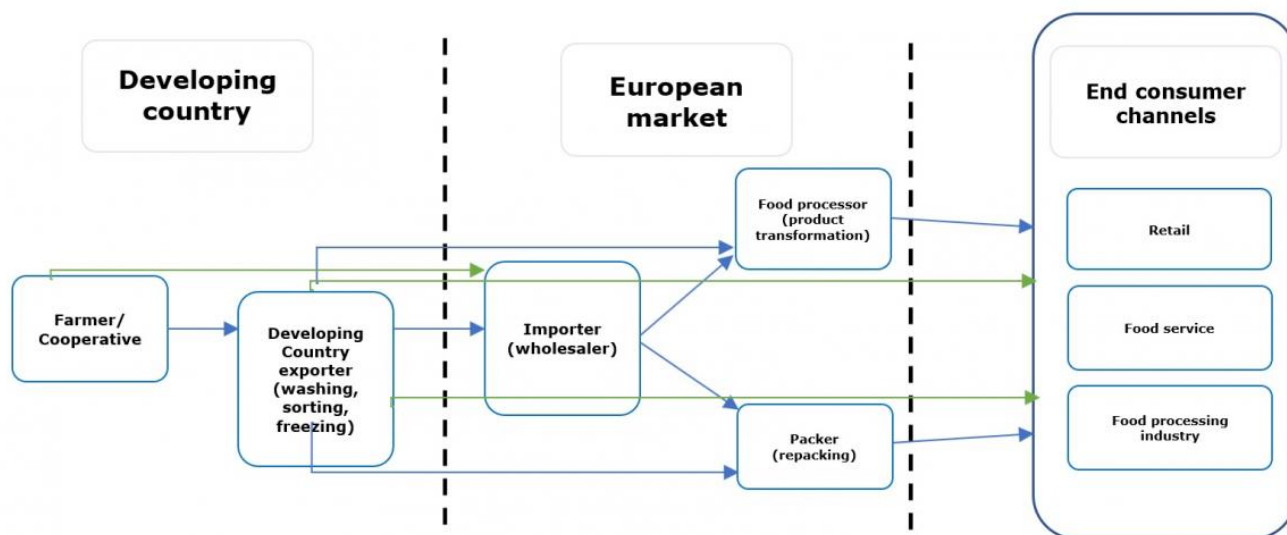
pizza industry is the key user of frozen mushrooms. The variety of frozen prepared food in Europe means there are more and more opportunities for frozen vegetable suppliers. The growing trend of vegan food consumption is also boosting sales of frozen vegetables by the frozen prepared meals industry.

Frozen vegetables are also increasingly sold in the form of frozen purees for use in smoothies, baby food and soups. The food ingredient industry also uses frozen vegetables in smaller quantities for the production of food additives. Vegetable snacks, such as kale chips or sweet potato fries, are examples of innovative products which are made with frozen vegetables.

Through what channels do frozen vegetables end up on the end market?

Importers (wholesalers) specialising in frozen vegetables, some of which can also be described as food ingredient suppliers, represent the most important channel for frozen vegetables in Europe. In many cases, large frozen vegetable producing companies also import frozen vegetables. Retail chains are very rarely supplied directly with frozen vegetables by developing country suppliers. European trading companies more commonly act as intermediaries and participate in the tendering procedures of retail chains.

Figure 2: European market channels for frozen vegetables



Importers/wholesalers

In most cases, direct importers act as wholesalers. Importers and wholesalers re-sell frozen vegetables to either food processors or packers. Some importers are also equipped with packing equipment and they can sell to final market segments directly. In addition to selling frozen vegetables, many of the importers also import frozen fruit so that they have a wider range of products to offer. In addition, leading frozen food companies in Europe make their products with vegetables as well as importing them.

For new suppliers, the challenge is to establish lasting relationships with well-known importers, as they usually already work with selected suppliers. Well-known importers perform audits and visit producing countries on a regular basis. Many new contacts find they must offer the same quality at lower prices than their competitors, at the start of the relationship.

The positions of the importers and food manufacturers are put under pressure by retailers. The higher demands imposed by the retail industry determine the supply chain dynamics from the top down. This pressure translates into lower prices, but also leads to added value aspects in the form of “sustainable,” “natural,” “organic,” or “fair trade” products. Transparency in the supply chain is needed. To achieve this, many importers develop their own codes of conduct and build long-lasting relationships with preferred developing country suppliers.

There are many frozen vegetables importers, and they often import a wide range of frozen products, aside from

frozen vegetables. Some of the leading companies importing frozen vegetables in Europe include [Nomad Foods](#) (Iglo, Birds Eye and Findus brands), [ARDO](#), [Crops](#) and [Greenyard Frozen](#).

Packing companies

Packing companies usually also import frozen vegetables. However, some of the vegetables are supplied by specialised importers, in particular companies which provide private label frozen vegetables to European retailers.

Food processors

The European frozen prepared food market uses a smaller portion of the frozen vegetables imported than the food service and retail segments. Some frozen ready meal makers import frozen vegetables, while some are supplied via intermediaries. In many cases, the food processing channel is not separate from importing/wholesale channel as the same company may belong to both channels.

Frozen ready meals are more popular in western Europe than in southern Europe. The United Kingdom has one of western Europe's largest and most well-developed markets for ready meals, with almost 1.6 billion ready meals sold per year. According to [Frozen Food Europe](#), the frozen pizza market is growing both in terms of sales and number of different varieties. Examples of frozen prepared meal companies in Europe are Nestle ([Wagner](#) frozen pizza brand), [Dr Oetker](#) (frozen pizzas and frozen ready meals), [Nomad Foods](#) (Iglo, Findus, Birds Eye brands), [Picard](#), [Amy's Kitchen](#) and [Chef Martin](#).

What is the most interesting channel for you?

Specialised importers/wholesalers of frozen fruit and vegetables seem to be the most useful contact if you aim to market frozen vegetables in Europe. This is specifically relevant for new suppliers, as supplying the retail segment directly is very demanding and requires considerable investments in the area of quality and logistics. The importance of Europe's low-end market for sales of frozen vegetables means that price competitiveness is very important.

Importers are usually quite knowledgeable when it comes to the European market and they closely monitor developments in frozen vegetable producing countries. Therefore, they are your preferred contact, as they can inform you in good time about market developments and provide practical advice about exports. Normally they import frozen fruit as well, so offering other products in addition to frozen vegetables can increase your competitiveness further.

Tips:

Understand the pressure from retailers for sustainable products and increase your competitiveness by investing in different certification schemes related to corporate social responsibility (CSR), organic foods or food safety. Having food safety certification is the minimum requirement if you want to tap into the retail segment.

Find European frozen vegetable traders on the website of the [European Association of Fruit and Vegetable Processing Industries](#) (PROFEL). You can search the database of [companies or national associations](#).

3. What competition do you face on the European frozen vegetables market?

Which countries are you competing with?

The leading frozen vegetable supplier is Belgium, followed by several other European producing countries. However, these countries should not only be seen as competitors, as they also import frozen vegetables from other places. The leading developing country supplier is China (which specialises in the supply of frozen mushrooms), followed by several other countries, each of which specialises in the supply of specific types of frozen vegetables.

Note: In terms of quantity, Germany exports more frozen vegetables than China. However, Germany is a transit country, as most of the traded volume is re-exported and not sourced from domestic production.

Belgium, the leading supplier of frozen vegetables to Europe

Production of frozen vegetables in Belgium accounts for more than a quarter of total European production. In addition, Belgium exports more than 90% of its total production. The Belgian frozen vegetable producers are located mainly in the East and West Flanders regions, and focus mainly on carrots, beans, spinach, peas, cauliflower and sprouts.

Exports of frozen vegetables from Belgium have increased by more than 120,000 tonnes since 2014, reaching 1.4 million tonnes in 2018. More than 80% of this was exported to other European countries. Belgium is also a major importer of frozen vegetables and around 40% of exported frozen vegetables are not produced in Belgium but are imported from other (mainly European) countries. Much of what is imported is, however, produced by Belgian companies, as several big frozen vegetable producers have subsidiaries in other European countries.

The leading export destinations for Belgian frozen vegetables in Europe are Germany and France, which import 50% the total exports to Europe. Belgium is a very strong exporter (the largest in the world) of frozen vegetable mixtures. These mixtures are sold as own brand products, or tailored to the needs of the retail and foodservice industries across Europe. Outside Europe, the leading export destination is the United States with frozen brussels sprouts as the main exported product.

The frozen vegetable industry in Belgium receives significant support from the [Belgian Processed Vegetables Union](#) (Vegebe). The Belgian vegetable processing industry has developed the [Vegaplan](#) standard. This standard is aimed ensuring farmers meet requirements in relation to food safety, traceability, integrated pest management and sustainable development on the farm. There are around 16,000 Vegaplan certified farms in Belgium.

Spain, increasing production and exports

Spain has increased its exports of frozen vegetables by more than 160 tonnes over the last five years. Exports increased from 488 thousand tonnes in 2014 to 650 thousand tonnes in 2018. More than 80% of those frozen vegetables are exported to other European countries with France as the leading export destination. The leading exported products are frozen broccoli, sweet peppers and peas. Outside Europe, the leading export destinations are the United States (with frozen broccoli as the main exported item) and Algeria (mainly frozen peas).

The top eight producers of frozen vegetables in Spain formed the Spanish [Association of Manufacturers of Frozen Vegetables](#) (ASEVEC) in 1985 to represent the interests of the industry in the relevant national and international organisations. According to ASEVEC, the Spanish frozen vegetable industry produced 786,000 tons of frozen vegetables in 2018, which is almost 11,000 tons more than in 2017, thus maintaining the growth trend seen in recent years. Broccoli accounts for 20% of the total volume of frozen vegetables. 71% of frozen broccoli, 80% of frozen sweet peppers and 50% of the frozen peas produced in Spain were exported in 2018.

In Spain, frozen vegetables are produced in several regions, but Navarre (northern Spain) is the leader, producing almost 30% of the nation's frozen vegetables, followed by Murcia (southeast Spain) and Andalusia

(southern Spain), which account for 20% and 12%, respectively, of production.

Poland, export diversification

Poland is the third biggest European exporter of frozen vegetables. Exports of frozen vegetables increased from 420,000 tonnes in 2014, to more than 500,000 tonnes in 2018. Frozen onions, cauliflower, carrots and leguminous frozen vegetables account for around 50% of all frozen vegetables produced in and exported from Poland. The fastest growing exports are frozen tomatoes, broccoli, sweet corn and sweet peppers. Around 70% of production is exported, with Germany being the main export destination (24% export share), followed by Belgium and Belarus.

Exports of frozen peas experienced the fastest growth, doubling over a period of five years, from 20,000 tonnes in 2014 to 45,000 tonnes in 2018. Poland is increasingly exporting frozen vegetables to destinations outside the European Union. Belarus, the United States and Canada are becoming important destinations for Polish frozen vegetables (frozen peas, in particular).

The Netherlands, producer, exporter and importer

The Netherlands is a large producer of vegetables in Europe but focuses mainly on the supply of fresh vegetables. Still, exports of frozen vegetables continue to grow, reaching 300,000 tonnes in 2018. The leading export destination is Germany, followed by Belgium. However, some of the vegetables exported to Belgium are produced by Belgian subsidiaries in the Netherlands, such as ARDO. The Netherlands is a particularly strong producer and exporter of frozen button mushrooms. In that segment, they are the largest exporter in Europe.

Developing country suppliers

- China is already one of the world's largest exporters of frozen vegetables. This is mainly because the Chinese vegetable market is so immense and there are production areas throughout the country. China exports various frozen vegetables to Europe, but leafy frozen vegetables, frozen mushrooms and frozen asparagus are particularly important items. China is the largest producer of frozen mushrooms in the world. This product is largely imported from China by the European foodservice sector.
- Serbia is a country with a highly developed frozen fruit industry and much of the processing capacity is also used to produce frozen vegetables. The key frozen vegetable exported to the European Union is frozen sweet pepper. Production of frozen peas is also on the rise.
- Turkey is the leading European supplier of frozen tomatoes. In addition, European imports of frozen sweet peppers from Turkey are increasing.
- Egypt is the leading supplier of frozen artichokes to Europe, with Italy as the main export destination. Egyptian frozen artichokes are used by the European foodservice segment, by pizza restaurants, in particular.
- Ecuador is an important supplier of frozen broccoli to Europe, with most of the exports going to Germany.
- Chile is the leading supplier of frozen asparagus to Europe, with most the exports going to Italy and Spain.

Tip:

Information about the frozen vegetable industry can be found on the websites of the leading producing countries: the Belgian vegetable processing sector union ([Vegebe](#)) and the Spanish Association of Manufacturers of Frozen Vegetables ([Asevec](#)).

Which companies are you competing with?

The supply of frozen vegetables in Europe is very concentrated, as subsidiaries of big processing companies carry out production in many European countries.

Belgium

Belgian vegetable processors are the European leaders, with freezing operations in many countries outside of Belgium. Many Belgian companies have established strong and recognisable brands in several European markets. A few of them are worth mentioning as they are the leaders in the European frozen food sector. Belgian companies are also major suppliers of frozen fruit and other frozen food products, besides frozen vegetables.

ARDO

[ARDO](#) is the leading frozen vegetable supplier in Europe. In Europe, ARDO currently holds a 20% market share in its segment and 40% of the production takes place in Belgium. ARDO has 21 units in 9 countries. Of those 21 units, 15 are processing operations located in Belgium, Spain, France, the Netherlands and the United Kingdom.

In order to minimise the environmental impact and produce vegetables in more sustainably, ARDO has developed a programme called MIMOSA (Minimum Impact Maximum Output Sustainable Agriculture). In this programme, ARDO cooperates closely with farmers to improve agricultural techniques, to produce more with less water, to use less plant protection products, fewer seeds, etc. Today, 63% of the total volume of all crops produced by ARDO do not contain any plant protection product residues.

The Greenyard Foods Group

[The Greenyard Foods Group](#) is one of the biggest Belgian frozen food producers. In 2015, this giant acquired Univeg Belgium and Peatinvest, becoming one of the major players on the European market. [Greenyard Frozen](#) has ten production sites, located in Belgium, Poland, the United Kingdom, Hungary and France. Freezing plants are strategically located in the main vegetable producing areas, in order to ensure quick transport and freezing after harvesting.

Vertical integration is one of the strong points of Greenyard, as the company Greenyard Frozen has developed lasting partnerships with the farmers. Agronomists from Greenyard provide support and educate farmers to implement the best agricultural techniques and produce first class vegetables. In addition, the company is focusing on producing vegetables in a sustainable way by reducing food waste and by reducing the use of water in farming and processing operations.

Crops

[Crops](#) is another large Belgian producer of frozen vegetables, frozen fruit and other frozen food products. In addition to its facility in Belgium, Crops operates vegetable processing units in Portugal, Spain and Poland. Crops also cooperates with farmers from many locations where vegetables are sourced.

Spain

In Spain, the production of frozen vegetables is dominated by several large processors. Some eight leading companies (with 20 processing units) produce 95% of Spain's total frozen vegetable supply. Belgian Crops and Greenyard Frozen also have a presence in Spain. Important producers in Spain include [Congelados De Navarra](#) (the leading European frozen broccoli producer), [Pedaneo](#), [Fruveco](#), [Sociedad Alimentaria Aragonesa](#) and [Virto](#) group.

Poland

The company [Real](#) is one of the largest producers of frozen fruit and vegetables in Poland and Europe as a whole. Continuous investments since 1990 have enabled the company to establish three freezing facilities, one cold storage facility and two units for the production of concentrated juices. Their cold store facility is one of the largest in Poland. Greenyard Frozen and Crops have processing units in Poland. Other frozen vegetable suppliers in Poland include [Hortex](#), [Iglotex](#), [Dawtona](#), Unifreeze and [Danex](#) (which specialises in frozen mushrooms).

Companies from other supplying countries

Examples of other frozen vegetable suppliers to Europe are:

- The Netherlands – [Oerlemans Foods](#), [Mondial Foods](#), [Ardo BV](#), [Scelta Mushrooms](#).
- France – [Bonduelle](#) (also a leading European producer of canned vegetables with many units around the world), [Gelagri](#) (with two facilities in Spain), [Daregal](#) (leader in frozen culinary herbs).
- China – [S.F.I Asia](#), [Fortune Foods](#), [Baixing](#) (which specialises in mushroom production), [Newfarm Food](#), [Longhai Yide Industry and Trade](#), [Frostar](#), [Beswor Foods](#) and [Three People \(Xiamen\) International](#).

Tip:

Visit major European trade fairs, such as [ANUGA](#), [SIAL](#) or [Food Ingredients](#) regularly to meet your competitors.

Which products are you competing with?

The main alternatives to frozen vegetables are fresh vegetables and canned vegetables. Many consumers (mostly erroneously) think that freezing can have an impact on the nutritional value of the vegetables and reduce the quantities of some nutrients such as vitamins. Fresh vegetable consumption is officially supported by European authorities such as [European Fresh Produce Association](#) (Freshfel). The most famous initiative is “[5 a day](#)” campaign which advocates consuming five portions of fresh fruit and vegetables per day.

Tip:

Read CBI studies on [fresh fruit and vegetables](#) to understand the competition with fresh products.

4. What are the prices for frozen vegetables?

There is no specialised market information service that enables daily monitoring of frozen vegetable prices. The prices depend a lot on the production prices in Belgium and other countries as well as production prices in major leading supplying countries for different types of vegetables. You can refer to portal [Alibaba](#) in order to compare your price policy with that of your competitors.

Generally speaking, frozen artichokes fetch the highest export prices, followed by frozen olives and frozen sweet corn. Frozen spinach is usually at the bottom of the list. In addition, quality and origin have an influence on the price. The example below shows the difference in export prices for frozen sweetcorn between Belgium and China. This is just an example, and it is not the rule, as the prices of some other frozen vegetables exported from China are similar to or even higher than those of vegetables from Europe.


Tip:

To receive regular and timely updates on frozen vegetable export prices, consider subscribing to the [IEGVu](#) portal, which is one of the most respected market information services for food ingredients, including frozen vegetables.


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