Exporting canned fruit and vegetables to Europe

Europe is the largest market for canned fruit and vegetables in the world, representing more than 42% of total world imports. Import volumes are stable for European types of canned fruit and vegetables, but the import of tropical and exotic products is increasing. Major importing and consuming markets such as Germany, France, the United Kingdom and the Netherlands offer the most opportunities for developing country exporters. Natural, low-sugar products are the main drivers of the consumer markets.

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1. Product description

Product definition

Canned fruit and vegetables are products defined by the following criteria:

- Prepared from substantially sound, fresh or frozen fruit and vegetables (they can undergo operations, such as washing, peeling, grading, cutting, et cetera, depending on the type of product).
- Packed with a suitable liquid packing medium. Packing medium can be different depending on the type of product (for example: dilution of sugar or other sweeteners, aromatic plants, spices, vinegar, fruit juices or nectars, oil, tomato puree).
- Packed with packing media that does not exceed 20% of the product’s net weight.
- Processed by heat (pasteurised or sterilised) to prevent spoilage and to ensure long shelf life of the product.

This study covers general information regarding the market for canned fruit and vegetables in Europe which is of interest to producers in developing countries. Please see the table 1 with the products and their product codes.

Table 1: Products in the product group of Canned Fruit and Vegetables
<table>
<thead>
<tr>
<th>Combined Nomenclature Number</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>200190 (and corresponding 10 digit codes)</td>
<td>Fruit and vegetables, corn, mushrooms preserved by vinegar or acetic acid</td>
</tr>
<tr>
<td>2008 (and corresponding 8 and 10 digit codes)</td>
<td>Prepared or preserved pineapples, citrus fruit, pears, apricots, cherries, peaches, strawberries, palm hearts, cranberries, mixtures and other fruit</td>
</tr>
<tr>
<td>2002 (and corresponding 6 digit codes)</td>
<td>Prepared or preserved tomatoes</td>
</tr>
<tr>
<td>2003 (and corresponding 6 digit codes)</td>
<td>Mushrooms prepared or preserved otherwise than by vinegar or acetic acid</td>
</tr>
<tr>
<td>2005 (and corresponding 6 digit codes)</td>
<td>Fruit and vegetables prepared or preserved otherwise than by vinegar or acetic acid</td>
</tr>
</tbody>
</table>

Picture 1: Retail packaging of canned pears

Source: Wikimedia

Picture 2: Retail packaging of canned vegetables
Product specification
Quality
The most common quality requirements for canned fruit and vegetables are the following:

- Normal colour, flavour and odour of canned fruits and vegetables;
- Uniformity of size;
- Specific composition of the packing medium;
- Minimum fill of 90% volume of the packaging.

Tip
- For quality requirements for specific canned fruit and vegetables refer to Codex Alimentarius Standards. Refer to Table 2 for quick orientation for specific standards.

Table 2: Codex Alimentarius standards for canned fruit and vegetables

<table>
<thead>
<tr>
<th>Type of product</th>
<th>Codex Alimentarius standard</th>
</tr>
</thead>
</table>

| Fruit                          | Canned applesauce  
|                              | Canned pineapple  
|                              | Canned raspberries  
|                              | Canned strawberries  
|                              | Canned fruit cocktail  
|                              | Canned tropical fruit salad  
|                              | Canned chestnuts and canned chestnut purée  
|                              | Canned stone fruit (apricots, peaches, plums, cherries)  
|                              | Certain canned citrus fruits (grapefruit, mandarin oranges, sweet orange and pumelo)  
|                              | Standard for Certain Canned Fruits (mangoes and pears)  
| Baby foods                   | Canned baby foods  
| Vegetables                   | Canned bamboo shoots  
|                              | Standard for Pickled Fruits and Vegetables  
|                              | Standard for Certain Canned Vegetables (asparagus, carrots, wax beans, green peas, palm hearts, processed peas, sweet corn, baby corn, mushrooms)  
| Vegetable preparations       | Regional Standard for Canned Humus with Tehena  
|                              | Regional Standard for Canned Foul Medames  
|                              | Regional Standard for Tehena  

**Labelling**

The following labelling is used in the trade of canned fruit and vegetables:

- Type of product including style (whole, halves, quartiers, slices, pieces, dices et cetera) and declaration the fruits are “peeled” or “unpeeled”;
- Defined minimum drained weight;
- Shelf life;
- Composition of the product (packing medium, additives);
- It is common for non-retailer packaging that specifications include the crop year and variety.

Information for non-retailer packaging has to be given either on the container or in accompanying documents. Packaging labelling must contain the following information:

- The name of the product;
- A lot identification;
- The name and address of the manufacturer, packer, distributor or importer;
- Storage instructions.

However, lot identification and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark.

In the case of retail packaging, product labelling must be in compliance with the European Union Regulation on [food Information to consumers](https://www.gov.uk/government/publications/food-information-to-consumers). This regulation defines nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information) more clearly. This regulation came into effect on December 13, 2014, but the obligation to provide nutrition information applies from December 13, 2016 onwards.

**Picture 3: Shipping label example**
There is no general rule for the export size of the packaging, so the packaging varies from retail sizes of around 500 g (for retail sale) to around 3 kg (for food service sector). In some cases, cans are not labelled with retail labels, but exported to European buyers which put labels on retail packaging.

Easy to open lids on cans are more and more frequently used in the trade of canned fruit and
vegetables. Even though the prices of the exported products increase slightly, easy to open lids are requested. This is because of the convenience.

Tip
- For more information about labelling and food contact materials see our study about **Buyers Requirements for Processed Fruit and Vegetables**.

2. Which European markets offer opportunities for exporters of canned fruit and vegetables?

Germany, United Kingdom, France and The Netherlands offer opportunities for developing country exporters of canned fruit and vegetables. Next to that, large markets opportunities can be found in the growing markets of Central and Eastern Europe. The products with rising demand are:

- Tropical fruit;
- Ginger;
- Asparagus;
- Artichokes;
- Beans;
- Cappers;
- Sweet peppers;
- Sauerkraut.

Imports

Slowly increasing European market for canned fruit and vegetables

- The European market for canned fruit and vegetables is expected to grow slowly for continental (non-tropical) types of fruit and vegetables and moderately for tropical types of fruit and vegetables.
- Regular fluctuations in imports are caused by the size of the harvested crops rather than by structural changes in the market. This means tight competition for new developing country suppliers if they are focused on the most traded goods such as canned tomatoes, canned stone fruit and continental types of vegetables.
- The outlook for tropical and exotic canned fruit and vegetables is much more positive providing greater opportunities for developing country suppliers. Those products include canned guava halves, canned mango slices, canned lychee and tropical fruit cocktails.
- Since 2012, total European imports of canned fruit and vegetables have been increasing at an average annual growth rate of 4% in value and 1% in quantity. In 2016, imports reached a value of €9.8 billion and quantity of 7.9 billion tonnes.
- The majority of imports concerns intra-European trade. Although imports from developing countries account for only for 24%, this is increasing at a higher rate than intra-European trade.
Germany, United Kingdom and France the largest importers

- The European market for canned fruit and vegetables is dispersed and there is no single country which dominates the import market. However, Germany is the largest importer of canned fruit and vegetables with the largest imported share from Italy (led by canned tomatoes).
- Central and Eastern European countries are expected to increase imports of canned fruit and vegetables more than western Europe. Within Europe, the countries with the highest annual import growth in quantity of canned fruit and vegetables in the last five years were Romania (12%), Hungary (6%), Slovenia (6%), Latvia (5%) and Slovakia (5%).
- Canned tomatoes had the highest value of imports in 2016, followed by mixtures of vegetables. Among canned fruit, the highest import value was recorded for canned pineapples (17% of all imported canned fruit).
- The largest European importer of canned fruit and vegetables from developing countries is Germany, with Turkey as the main developing country partner. Turkey is especially strong in canned sweet peppers and olives. France is another important importer from developing countries, with Morocco as the main developing country supplier (mainly olives and apricots), followed by Spain (sourcing a lot of canned chili peppers, asparagus and artichokes from Peru).
China the leading developing country supplier of canned fruit and vegetables to Europe

- Sourcing of canned fruit and vegetables is mainly satisfied within Europe, with Italy as the leading supplier.
- China is the leading developing country supplier of canned fruit and vegetables (mostly canned asparagus, tomatoes and vegetable mixtures), followed by Turkey (olives and sweet peppers), Thailand (pineapples) and Peru (mostly asparagus, followed by chili peppers and artichokes).
- Developing country suppliers with the most notable growth in exports of canned fruit and vegetables to Europe in the last five years were Ukraine (43% yearly growth, mostly canned tomatoes and cucumbers), Egypt (43%, mostly canned tomatoes), Chile (21%, mostly canned tomatoes, cranberries and grapes) and Vietnam (22%, canned pineapples).
- For developing country suppliers, the opportunities can be found in export of canned exotic fruit (guavas, mangoes, mangosteens, papayas, tamarinds, cashew apples, lychees, jackfruit, sapodilla plums, passion fruit, carambola and pitahaya) as those products are increasingly imported in Europe. There is also an increasing demand and growth of imports of canned ginger, asparagus, artichokes, beans, cappers, sweet peppers and sauerkraut.
**Tips**

- Identify who the biggest importers of your product are in selected large or fast growing markets. You can start with searching on the internet or read more about supply chains in Europe in our Study of *Market channels and segments for Processed Fruit and Vegetables*.

- Besides aiming to export to the largest European importers, consider countries that are seeing growth in imports such as Eastern Europe or Baltic countries.

- If you are supplier from southern hemisphere use the high demand opportunity to offer canned peaches.

- Use the increasing demand opportunity to offer canned pineapples which can be of comparable quality to pineapples from Thailand or Indonesia.

- Learn from developing country exporters who are gaining share on the European market such as Ukraine, Egypt, Chile and Vietnam.

- If you want to export continental types of canned fruit and vegetables, be prepared to face strong competition. However, you can learn from developing countries which have found ways to enter European market with new products. Good examples are South Africa in export of canned apricots, Philippines in fruit cocktails, China in fruit cocktails, peaches, pears, beans and mandarins and Thailand in sweetcorn.

- Find the information about canned fruit and vegetables industry and export strategies of fast growing countries on sectoral associations as well as on main market information portals such as *IEGVu*.

- Consider export of canned products which are not produced in Europe such as tropical fruit and vegetables.
Exports

Italy the leading exporter of canned tomatoes, pears and beans

- The largest European exporters can be potential competitors to developing country suppliers. However, the majority of developing country suppliers do not export similar products to those from European exporters. Beside leading products, such as canned tomatoes and olives, major traded canned products from Europe are: canned apricots (Greece), canned mandarins (Spain), canned peaches (Greece), canned pears (Italy), canned beans (Italy), canned peas (France and Hungary), canned sweetcorn (Hungary).
- In terms of value, European exports (including intra-European trade) of canned fruit and vegetables has grown since 2012 by an annual rate of 4% and reached €10.5 billion in 2016. In quantity, exports grew by 2% and reached 8.5 million tonnes in the same period.
- Around 75% of all European exports of canned fruit and vegetables are intra-European exports.
- European export is concentrated. Italy together with Spain accounted for almost of 50% of total exports. Italy is the leading European producer and exporter of canned tomatoes, while Spain leads the export of preserved (jarred or canned) olives. Number three, the Netherlands, is an important re-exporter and can provide a hub for your exotic canned produce.

USA and Russian Federation the main export destinations for European suppliers

- Regarding the largest European exporters in last five years, the highest annual export growth in value was in Spain (6%, mainly canned olives), Italy (4%, mainly canned tomatoes), and Greece (2%, mainly canned olives and canned peaches).
- The main external export destination in 2016 was the United States, followed by the Russian Federation and Switzerland.
- Regarding the largest European export destinations, the largest increase in exports from the European Union in the last five years was to Libya (47% annual growth, mainly canned tomatoes from Italy), Saudi Arabia (11%, mainly olives from Spain) and the United Arab Emirates (mainly canned tomatoes from Italy).

Tips

- Besides targeting your exports to the European Union, you can learn from European exporters and their target markets within Europe, such as Germany, France and the
United Kingdom. You can also find opportunities in the growing market for canned fruit and vegetables in Arab countries.

- Learn more about your competitors in our study about Competition in processed fruit and vegetables.

**Production**

Tomatoes and peaches the most important canned products in Europe

- Production of canned fruit and vegetables in Europe has increased gradually between 2012 and 2015. However, there was a decrease in production, mainly due to lower production in Europe (e.g. Greece) and decreased sourcing from important production destinations, such as Thailand.
- The highest annual production growth in the last five years was reported in Slovenia (28%), the Netherlands (18%) and France (15%).
- The European Union produces more canned vegetables than canned fruit. The most produced canned vegetables are canned tomatoes, while the most produced canned fruit are canned peaches. Italy is the largest producer of canned tomatoes, tomato paste and tomato ketchup, while Greece is the largest producer of canned peaches.
- The European Union accounts for around 30% of total world production of canned peaches. Greece and Spain, the two largest canned peach producers in the European Union, together accounted for more than 90% of total European production, while Italy and France account for the remaining amount.
- Italy is the largest European producer of canned vegetables with production of nearly 750 million of cans (of 850 ml) in 2014. Greece is the largest producer of canned fruit with production of more than 320 million cans (of 850 ml).

**Figure 5: European total production of canned fruit and vegetables 2012-2016**

in € millions

Note that the figures above display the production of manufactured goods, which include intermediate goods as well as final goods. This implies that it is possible that there is overlap in production data and import data, since raw materials may be imported and further processed.
Bonduelle the leading producer

- Some of the largest players in the canned fruit segment in Europe are: Del Monte Fresh Produce, LBO France (French equity fund, owner of MOM Group/Materne fruit compotes brand), Andros, Conserve Italia and Dole. Del Monte is the European and the world leading trader of canned pineapples in the world.

- Some of the largest players in the canned vegetables segment are: Bonduelle, General Mills, CECAB Group, Orkla, Grupo di Luca and HAK.

- Bonduelle is the leader in the production of canned vegetables in Europe. The largest production place of Bonduelle is in France where they employ more than 5,000 workers. However, the company announced at the beginning of 2016 that they are going to shut down production at a site in Russy Bémont in northern France. Its canning activities will be concentrated at three other facilities in Estrées Mons, Vaulx Vraucourt and Renescure.

Tips

- You can find opportunities for export in cooperating with the European canneries. The largest producing companies often complement their offer with imported canned fruit and vegetables. They are therefore potential customers. An example is the increasing import of tomato products to Italian canneries from Egypt.

- Check the website of PROFEL, the European Association of Fruit and Vegetable Processing Industries, for information about ongoing issues on the European processed fruit and vegetables market. The website provides links to the websites of the national member associations.

Consumption

Figure 6: European apparent consumption of canned fruit and vegetables 2012–2016

in € millions

The figure above displays the apparent consumption of canned fruit and vegetables, calculated as the difference between external European imports, production and exports to external destinations.
Some imported products are further processed before local consumption or re-exports, which means that there is a chance of double counting.

- In terms of value, apparent consumption of canned fruit and vegetables has increased from €12 billion in 2012 to over €13 billion in 2016. The primary consuming country is Italy, thanks to the consumption of canned tomato products (pelati, canned chopped tomatoes, etc.) which are traditional ingredients in Italian cuisine.
- The main drivers influencing the increasing consumption of canned fruit and vegetables are the fast-paced lifestyle and growing preference for convenience food.

Tip

- In targeting your markets, make a distinction between production countries that import canned fruit and vegetables as raw materials and consuming countries which import for their own consumption. In the second category, more attention should be paid to developments in the retail sector and local consumption trends.

3. Which trends offer opportunities on the European market for canned fruit and vegetables?

Consumer demand for vegan, gluten-free and natural food offers opportunities to exporters from developing countries. Food safety certification supported by frequent laboratory tests and together with corporate social responsibility standards can additionally provide a great advantage to European markets suppliers.

Specific trends for canned fruit and vegetables:

- Mergers, acquisitions and centralisation of the production is influencing the European canned fruit and vegetables industry. The decline in Europe's retail canned vegetables market led to overcapacity, sparking a price war, especially among private-label suppliers. European producers are therefore looking for ways to decrease costs of the production. For example, Bonduelle is planning to increase production capacity in Russia and to close a production site in France. Another example is the merger of the three companies into Greenyard Foods Group with the aim to centralise globally offer of the full range of fresh, frozen and canned products.
- Low sugar products are in demand on the European market. This trend is not very favourable for traditional canned fruit products as the common packing medium is sugar syrup. On the other hand, canned fruit packed into its own juice is favourable on the European market.
- Consumption of superfruit is likely to increase, so consumption of canned berries without added sugar is expected to increase too.

Possible consequences of the United Kingdom’s withdrawal from the European Union:

- Although the final scenario regarding the possible withdrawal of the United Kingdom from the European Union is still not known, it is possible to predict some market issues. In the short term, no significant changes are expected apart from the weaker pound. In the long term, the consumers in the United Kingdom will continue to consume canned fruit and vegetables and the amount of direct imports, rather than through intermediaries, is likely to increase.
- At the moment of writing of this report, the euro has weakened by 2–3% as a result of the United Kingdom’s potential withdrawal process, making imports for the euro countries somewhat more expensive as well.

With respect to Canned Fruit and Vegetables, an extensive study about European market trends is already available. See our study about Trends for Processed Fruit and Vegetables.
4. With which requirements should canned fruit and vegetables comply to be allowed on the European market?

Legal requirements

All foods including canned fruit and vegetables sold in the European Union must be safe. This applies to imported products as well. Additives must be approved. Harmful contaminants such as pesticide residues, or exceeded level of mycotoxins or preservatives are banned. It should also be readily obvious from the labelling if a food contains allergens. Cans and other materials used for packaging must be corrosion resistant and free from contaminants such as cadmium or Bisphenol-A (BPA).

Food safety

In the event of repeated non-compliance of specific products originating from particular countries, strict conditions may apply. These strict conditions in practice means obligatory laboratory checks for the defined number of imported containers or trucks. Products from countries that have shown repeated non-compliance are put on a list included in the Annex of Regulation (EC) 669/2009. Currently (March 2016) on the list for the increased control for presence of sulphites are: canned apricots from Turkey and canned apricots from Uzbekistan.

In 2015, the Rapid Alert System for Food and Feed reported several alert notifications for canned fruit and vegetables products. The most frequent problems are corrosion of packaging, too high content of preservatives and colours as well as migration of materials from the packaging into the fruit such as tin or cadmium. These notifications constitute only the top of the iceberg, since many rejections and other food safety issues are handled directly by the trade, without the government intervening.

The potential harm from BPA has been debated in several European Union member countries, such as Sweden, Denmark and France. On 1 January 2010, France banned the use of BPA in products that come into direct contact with food for babies and young children, like feeding bottles. The European Union ban followed in January 2011. From 1 January 2015, France has introduced a new law, banning the use of BPA in all food packaging.

The latest announcement from European Food Safety Authority (EFSA) states that BPA, an endocrine disruptor, poses no health risk to consumers of any age group at current exposure levels.

Four new legislations concerning different pesticide residues were introduced in 2016. New pesticides residue limits are relevant for many fruit and vegetable products.

Packaging requirements

Packaging used for canned fruit and vegetables must:

- Protect the taste, colour and other quality characteristics of the product;
- Protect the product from bacteriological and other contamination (including contamination from the packaging material itself);
- Not pass on any odour, taste, colour or other foreign characteristics to the product;
- Be corrosion resistant (in case of tin cans).

It must be ensured that there is no migration of unsafe levels of chemical substances from the packaging material to the food. In Europe, the use of inside lining material, Bisphenol-A is banned in baby bottles. Canned fruit and vegetables purees are very common ingredients in baby food.

Labelling Requirements

In December 2014, the new labelling legislation went into effect. The new labelling legislation forbids to mislead the consumer. Moreover, claims that any food is preventing, treating or curing a human disease cannot be made.

Another change is allergens labelling, where allergens have to be highlighted in the list of
Ingredients. Requirements on information on allergens will also cover non pre-packed foods including those sold in restaurants and cafés. Allergens include all nuts and sulphur dioxide and sulphites at concentrations of more than 10 mg/kg in terms of the total SO2.

Also, nutrition information is mandatory for canned products.

**Tips**
- In addition to the quality requirements mentioned in the product description, for the general overview of the buyer requirements in the European Union please refer to our study about [Buyer requirement for processed fruit and vegetables](#).
- Specifically, for canned fruit and vegetables, consult the EU Trade Helpdesk where you can find [European Union legislation](#) for your selected products under the corresponding codes.
- For information on commonly requested standards, check the International Trade Centre's [Sustainability Map](#), an online tool which provides comprehensive information on over 210 voluntary sustainability standards and other similar initiatives covering issues such as food.
- Refer to [Codex Alimentarius](#) for practical guidelines that can support you in fulfilling requirements on European food safety legislation. Specifically, for canned fruit and vegetables those guidelines include: Code of Hygienic (Practice for Canned Fruit and Vegetable Products and Practice for Low and Acidified Low Acid Canned Foods); Code of Practice (for the Prevention and Reduction of Inorganic Tin Contamination in Canned Foods); Guideline (Procedures for the Visual Inspection of Lots of Canned Foods for Unacceptable Defects).
- For an example of independent certification programmes aimed for environmental protection and corporate social responsibility, refer to [best Corporate Social Responsibility (CSR) practices of Bonduelle](#). As part of its partnership with the Réseau Alliances, Bonduelle formalises each year twenty best practices in all areas of corporate social responsibility.

5 . What competition will I be facing on the European canned fruit and vegetables market?

For more information about competition on the European canned fruit and vegetables market, see our [Competition study](#).

6 . Which channels can you use to put canned fruit and vegetables on the European market?

The specialised importer is the preferred channel for market entry in this sector. Many importers are also packers and, in addition, conduct trading and wholesale activities. After the import, products reach different segments of the market as described in Figure 8.

In some cases, developing country exporters can also supply to the different segments directly without the importer as intermediary. However, this does not happen frequently.

Comparing to other fruit and vegetables processing industry segments in Europe, canned fruit and vegetables are much less used as ingredients. Major quantities are sold directly in retail segment under the importer’s or private label brands or in food service segment.
Food service segment for canned fruit and vegetables have significant share on the European market. This segment requires bigger packaging (up to 5 litre) and non-branded products of the standard quality. An important player in food service segment is public sector, which is supplied via public procurement procedures. Developing country exporters willing to reach food service segment very rarely can do it directly due to procedural requirements and they are therefore advised to search for specialised food service suppliers.

Chart 1: European and EFTA market channels for canned fruit and vegetables 2016

For more information, see our extensive study about market channels and segments for Processed Fruit and Vegetables. Also, read our tips about doing business and finding buyers on the European market of processed fruit and vegetables.

7. What are the end-market prices for canned fruit and vegetables on the European market?

An indication of margins according to final retail prices for canned fruit and vegetables is not very precise as the whole sector contains many different products. The prices are also different between producing countries regarding type, size of packaging, fruit or vegetable variety and quality of products. Therefore, developing country exporters can only have a very rough general overview of the price development.

Very roughly, it can be estimated that the Cost, Insurance and Freight (CIF) price represents around 25% to 50% of the retail price of a retail pack of canned fruit and vegetables. In cases when final retail product is sold directly to retail chains, the share is much higher. Unlikely many other products in the processed fruit and vegetables sector, many canned products are reaching more quickly retail segment because they are frequently packed into retail packaging.

The best option to monitor prices is to compare your offer with the offer from the largest competitors.

A very rough breakdown of the prices is shown in the table below:

Table 3: canned fruit and vegetables price breakdown
<table>
<thead>
<tr>
<th>Steps in export process</th>
<th>Type of price</th>
<th>Average share of the retail price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production of fruit or vegetables</td>
<td>Raw material price (farmers’ price)</td>
<td>5% (in case fresh fruit is used as raw material for drying)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>15–25% if the product is already processed</td>
</tr>
<tr>
<td>Handling, processing and selling bulk product</td>
<td>FOB or FCA price</td>
<td>30%</td>
</tr>
<tr>
<td>Shipment</td>
<td>CIF price</td>
<td>32-35%</td>
</tr>
<tr>
<td>Import, handling and processing</td>
<td>Wholesale price (value added tax included)</td>
<td>60%</td>
</tr>
<tr>
<td>Retail packing, handling and selling</td>
<td>Retail price (for average packaging of 800–1000 grams)</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: Market researcher compilation based on industry sources

Please note that the share of the retail price which is paid to farmers varies a lot between producing countries and the type of product. It will also vary from year to year, depending on market conditions as retailers tend to keep stable prices for final consumers even in common cases of fluctuation of import prices.

If the farmers add value to their produce through differentiated quality, food safety, certification and processing steps, their price will be higher.

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