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 the 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. Large importing and consuming markets such as Germany, France, the United Kingdom and the Netherlands offer the most opportunities for exporters from developing countries. Natural, low-sugar products are the main drivers of the consumer markets.

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 and so on, depending on the type of product);
- packed with a suitable liquid packing medium. The 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 and tomato purée);
- packed with packing media that do not exceed 20% of the product’s net weight;
- processed by heat (pasteurised or sterilised) to prevent spoilage and to ensure a 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 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
The most common quality requirements for canned fruit and vegetables are the following:

- normal colour, flavour, and odour of canned fruits and vegetables;
- uniform size;
- specific composition of the packing medium;
- minimum fill of 90% volume of the packaging.

For quality requirements for specific canned fruit and vegetables, refer to the Codex Alimentarius Standards. Refer to Table 2 for a quick orientation on 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, quarters, slices, pieces, dices and so on) and declaration whether the fruits are “peeled” or “unpeeled”;
- defined minimum drained weight;
- shelf life;
- composition of the product (packing medium, additives);
- for non-retailer packaging, specifications including 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:

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

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

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

**Picture 3: Shipping label example**
Packaging

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 sales) to around 3 kg (for the food service sector). In some cases, cans are not labelled with retail labels but exported to European buyers who 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 of Buyer requirements for processed fruit and vegetables.

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

Germany, the United Kingdom, France and the Netherlands offer opportunities for exporters of canned fruit and vegetables from developing countries. Moreover, large market opportunities can be found on 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 as well as 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 on the market. This means tight competition for new suppliers from developing countries 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 suppliers from developing countries. Those products include canned guava halves, canned mango slices, canned lychee and tropical fruit cocktails.
- Since 2013, the total European imports of canned fruit and vegetables are increasing, with an average annual growth rate of 4% in value and 2% in quantity. In 2017, the imports reached a value of € 9.1 billion and a quantity of 7.6 million tonnes.
- The majority of imports concerns intra-European trade. Although the import from developing countries accounts for 26%, it 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 their imports of canned fruit and vegetables in relative terms more than western Europe. Within Europe, the countries with the highest annual import growth in the quantity of canned fruit and vegetables over the last five years were Romania (13%), Ireland (9%) and Hungary (6%).
- Among canned vegetables, canned mixtures of vegetables had the highest value of imports in 2017, followed by canned tomatoes and tomato purée. In the category of canned vegetables, canned olives have recorded the highest annual import growth rate since 2013 at 7%. Imports of canned olives increased by nearly 60,000 tonnes over the last five years. However, this import also represents the import of olives packed in barrels which is later repacked for final consumers.
- Among canned fruit, the highest import value was recorded for canned pineapples (17% of all imported canned fruit). Canned pineapples also have the highest annual import growth rate since 2013 (10%), followed by canned and preserved cranberries (8%).
- The largest European importer of canned fruit and vegetables from developing countries is Germany, with Turkey as the main partner from a developing country. Turkey is especially strong in canned sweet peppers and olives. France is another important importer from developing countries, with Morocco as the main supplier from a developing country (mainly olives and apricots), followed by Spain (sourcing a lot of canned chili peppers, asparagus and artichokes from Peru).
China the leading supplier from a developing country

- The sourcing of canned fruit and vegetables is mainly satisfied within Europe, with Italy as the leading supplier. Italy is specifically strong in the supply of canned tomatoes, while Spain and Greece are the major internal producers and suppliers of canned fruit (specifically canned peaches and apricots).
- China is the leading supplier of canned fruit and vegetables from developing countries (mostly canned asparagus, tomato purée and tomato purée concentrate), followed by Turkey (olives and sweet peppers), Thailand (pineapples) and Peru (mostly asparagus, followed by chili peppers and artichokes).
- Suppliers from developing countries with the most notable growth in the supply of canned fruit and vegetables to Europe over the last five years were Ukraine (87% annual growth; mostly canned olives and sweet corn), Egypt (36%; mostly canned olives), Costa Rica (26%; canned tropical fruit) and Indonesia (21%; canned pineapples).
- For suppliers from developing countries, the opportunities can be found in the 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 a growth in imports of canned ginger, asparagus, artichokes, beans, cappers, sweet peppers and sauerkraut.
**Figure 3: Leading suppliers of canned fruit and vegetables to Europe 2013–2017**

in € thousand

<table>
<thead>
<tr>
<th>2013</th>
<th>2015</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>Spain</td>
<td>Germany</td>
</tr>
<tr>
<td>1500</td>
<td>1000</td>
<td>500</td>
</tr>
</tbody>
</table>

Source: ITC TradeMap

**Tips:**

- Identify who the largest importers of your product are on selected large or fast-growing markets.
- Next to aiming at exports to the largest European importers, consider countries that are seeing growth in imports, such as Eastern or Central Europe.
- If you are a supplier from the 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 exporters in other countries who are gaining share on the European market, such as Ukraine, Egypt, Costa Rica or Indonesia.
- 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 the European market with new products. Good examples are South Africa in the export of canned apricots, the Philippines in fruit cocktails, China in fruit cocktails, peaches, pears, beans and mandarins, and Thailand in sweet corn.
- Find information about the 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 the 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 suppliers from developing countries. However, the majority of suppliers from developing countries do not export similar products to those from European exporters. In addition to leading products such as canned tomatoes and olives, major canned products traded from Europe are canned apricots (Greece), canned mandarins (Spain), canned peaches (Greece), canned pears (Italy), canned beans (Italy), canned peas (France and Hungary) and canned sweet corn (Hungary).

- In terms of value, the European exports (including intra-European trade) of canned fruit and vegetables have grown by an annual rate of 3% since 2013 and reached € 9.4 billion in 2017. In quantity, the exports have grown by 2% and reached 7.9 million tonnes in the same period.

- Around 75% of all European exports of canned fruit and vegetables are intra-European exports.

- The European export is concentrated. Italy and Spain accounted for almost 50% of the total exports. Italy is the leading European producer and exporter of canned tomatoes and tomato purée, 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

- Among the largest European exporters over the last five years, the highest annual export growth in value was in Spain (7%; mainly canned olives) and Portugal (3%; mainly canned tomatoes and canned olives).

- The main external export destination in 2016 was the United States followed by the Russian Federation and Japan.

- Among the largest European export destinations, the highest increase of exports from the European Union over the last five years was to Israel (11% annual growth; mainly canned mushrooms from the Netherlands and Poland, olives from Greece and tomatoes from Italy) and Norway (mainly canned and other preserved tomatoes from Italy).

Tips:

- Apart from targeting your export to the leading importing countries in Europe, 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 on growing markets for canned fruit and vegetables, such as Norway or Middle Eastern markets.

Production
Tomatoes the most important canned vegetable and peaches the most important canned fruit in Europe

- The production of canned fruit and vegetables in Europe increased gradually from 2013 to 2017, with a small dip in 2016.
- 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 the total world production of canned peaches. Greece and Spain, the two largest producers of canned peaches in the European Union, together accounted for more than 90% of the total European production. Italy and France accounted for the remaining amount.

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 within 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 leading trader of canned pineapples in Europe and 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
site of Bonduelle is in France, where they employ more than 5,000 workers. Bonduelle canning activities are concentrated within 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 market for processed fruit and vegetables. The website provides links to the websites of the national member associations.

### Consumption

**Figure 6: European apparent consumption of canned fruit and vegetables, 2013–2017**

In € million

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, the apparent consumption of canned fruit and vegetables increased from € 16 billion in 2013 to more than € 19 billion in 2017. The largest consuming country is Italy, thanks to the consumption of canned tomato products (pelati, canned chopped tomatoes and similar), which is a traditional ingredient in the Italian cuisine.
- The main drivers influencing the increasing consumption of canned fruit and vegetables are the fast lifestyle and the growing preference for convenience food.
3. Which trends offer opportunities on the European market for canned fruit and vegetables?

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

Specific trends for canned fruit and vegetables:

- Mergers, acquisitions and centralisation of production are influencing the European canned fruit and vegetables industry. The decline in Europe's retail market for canned vegetables led to overcapacity, sparking a price war, especially among private-label suppliers. European producers are therefore looking for ways to decrease the costs of 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 three companies into the Greenyard Foods Group, with the aim to centralise the global offering 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.

- The consumption of superfruit is likely to increase, so the consumption of canned berries without added sugar is expected to increase too.

Possible consequences of the withdrawal of the United Kingdom 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, as the consumers in the United Kingdom will continue to consume canned fruit and vegetables, the amount of direct imports rather than through intermediaries is likely to increase.

With respect to canned fruit and vegetables, an extensive study of European market trends is already available. See our study of 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 excessive levels of mycotoxins or preservatives, are banned. It should also be readily obvious from the labelling whether 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 case of repeated non-compliance of specific products originating from particular countries, stricter conditions may apply. These strict conditions in practice mean obligatory laboratory checks for a 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 to Regulation (EC) 669/2009.

In 2015, the Rapid Alert System for Food and Feed reported several alert notifications for canned fruit and vegetable products. The most frequent problems are corrosion of packaging, excessive content of preservatives and colouring, as well as migration of materials from the packaging into the fruit such as tin or cadmium. These notifications constitute only the tip 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 States, 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, such as 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 the 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.

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 the inside lining material Bisphenol-A is banned in baby bottles. Canned fruit and vegetables purées are very common ingredients in baby food.

Labelling requirements

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

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

Nutrition information is also mandatory for canned products.

Tips:

- In addition to the quality requirements mentioned in the product description, for a general overview of the buyer requirements in the European Union, please refer to our study of Buyer requirements 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 the Codex Alimentarius for practical guidelines that can support you in fulfilling the requirements on European food safety legislation. Specifically for canned fruit and vegetables, those guidelines include:
  - Guideline Procedures for the Visual Inspection of Lots of Canned Foods for Unacceptable Defects;
  - Code of Hygienic Practice for Canned Fruit and Vegetable Products;
  - Code of Hygienic Practice for Low and Acidified Low-Acid Canned Foods;

- For an example of independent certification programmes aimed at environmental protection and corporate social responsibility, refer to the best corporate social responsibility (CSR) practices of Bonduelle. As part of its partnership with the Réseau Alliances, Bonduelle formalises twenty best practices in all areas of corporate social responsibility each year.

5. What competition do I face on the European market for canned fruit and vegetables?

For more information about competition on the European market for canned fruit and vegetables, see our study of Competition.

6. Through which channels can you get 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 Chart 1.

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

Compared 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 the retail segment under the importer’s or private-label brands, or in the food service segment.

The food service segment for canned fruit and vegetables has a significant share on the European market. This segment requires larger packaging (up to 5 litre) and non-branded products of standard quality. An important player in the food service segment is the public sector, which is supplied via public procurement procedures. Exporters from developing countries willing to reach the food service segment are very rarely able to reach 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
Read our tips for Doing business and Finding buyers on the European market for processed fruit and vegetables.

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

Indications of margins according to the final retail prices for canned fruit and vegetables are not very precise, as the whole sector contains many different products. The prices are also different between producing countries regarding the type, size of packaging, fruit or vegetable variety and quality of products. As a result, exporters from developing countries 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 for a retail pack of canned fruit and vegetables. In cases when the final retail product is sold directly to retail chains, the share is much higher. Unlike many other products in the processed fruit and vegetables sector, many canned products are reaching the retail segment more quickly, 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: Price breakdown for canned fruit and vegetables

<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) 15–25% if the product is already processed</td>
</tr>
</tbody>
</table>
Handling, processing and selling bulk product

<table>
<thead>
<tr>
<th></th>
<th>FOB or FCA price</th>
<th>30%</th>
</tr>
</thead>
<tbody>
<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 fluctuating 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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