Exporting edible nuts and dried fruits to Europe

The European Union is the largest market for edible nuts in the world, representing more than 40% of total world imports. Import volumes are steadily increasing. Large importing and consuming markets such as the Netherlands, Germany, France and the UK offer opportunities for developing country exporters. Natural, low sugar and safe products are the main trends supporting increasing consumption of edible nuts and dried fruit.

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1. Product description

Product definition

Edible nuts and dried fruit are two different groups of products which are usually traded by the same companies in international trade. The reason for this is their longer shelf life compared to fresh fruit and vegetables and similar storing and handling conditions. Also, edible nuts and dried fruit are used in a similar way: as snacks or as culinary ingredients in bakery or confectionary products.

- A nut is a fruit composed of a hard shell and a seed, which is mostly edible. However, in a general context, a wide variety of dried seeds are also called nuts and include some seeds without hard shell (e.g. pine nuts).
- Dried fruit is fruit from which the majority of the original water content has been removed. This is done either naturally, through sun drying, or through the use of specialized dryers or dehydrators.

This study covers general information regarding the market of edible nuts and dried fruits 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 edible nuts and dried fruits**
<table>
<thead>
<tr>
<th>Combined Nomenclature Number</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>0801 (and corresponding 8 digit codes)</td>
<td>Brazil nuts, desiccated coconuts, cashew nuts</td>
</tr>
<tr>
<td>0802 (and corresponding 8 digit codes)</td>
<td>Almonds, hazelnuts, walnuts, chestnuts, pistachios</td>
</tr>
<tr>
<td>0803 (and corresponding 8 digit codes)</td>
<td>Dried bananas and plantains</td>
</tr>
<tr>
<td>0804 (and corresponding 8 digit codes)</td>
<td>Fresh or dried figs, pineapples, avocados, guavas, mangoes and mangosteens</td>
</tr>
<tr>
<td>0805 (and corresponding 8 digit codes)</td>
<td>Dried oranges, clementines, monreales, satsumas, mandarins, wilkings, tangerines, tangelos, ortaniques, malaquinas, grapefruit, lemons, limes</td>
</tr>
<tr>
<td>0806 (and corresponding 8 digit codes)</td>
<td>Dried grapes</td>
</tr>
<tr>
<td>0813 (and corresponding 8 digit codes)</td>
<td>Other dried fruit and dried fruit mixtures</td>
</tr>
</tbody>
</table>

Picture 1: Mixture of dried fruit

Source: Pixabay

Picture 2: Dried fruit on the street market
Picture 3: Mixed edible nuts

Picture 4: Dried fruit less commonly produced
Product specification
Quality
The general quality requirement for all dried fruit and nuts is that products should be of "sound, fair and of marketable quality" for these products and requires them to bear the full name of their country of origin. Fruit and vegetables that are not covered by a specific standard, must meet the general standard – or the applicable UNECE standard. Operators are free to choose which standards they would use in their business practice.

The most common quality requirements for edible nuts and dried fruit are the following:

- Moisture content (maximum level is defined for specific products);
- Sizing (different for every type of dried fruit and nuts);
- Specific cut (for certain types of dried fruit);
- Level and types of used preservatives;
- Quality class (defined by uniformity and tolerances).

For detailed good hygiene practice please refer to the Codex Alimentarius Codes of Hygienic Practice for dried fruit, tree nuts and more specifically for groundnuts (peanuts).

Labelling
The following labelling is used in the trade of edible nuts and dried fruit:

- The name of the product should be declared and specifying if product is naturally dried or sugar is added (for specific types of dried fruit).
- Information about nuts should contain specification if they are shelled or in shell.
- Regarding certain types of dried fruit which have seeds or pits, the label should declare presence of the seeds or pits.
- It is common that besides grading, specifications include the crop year and variety.

Information for non-retail containers has to be given either on the container or in accompanying documents. Container 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. This regulation defines more clearly nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information). This regulation came into effect on December 13, 2014 but the obligation to provide nutrition information will apply from December 13, 2016.

Picture 5: Shipping label example

Source: Integrated Business Communications Alliance

Picture 6: Example of allergen advice on the retail packaging
Packaging

Packaging used for dried fruit and edible nuts must:

- Protect the organoleptic and 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.

The safety of food contact materials must be evaluated and ensure that there is no migration of unsafe levels of chemical substances from the material to the food.

There is no general rule for export packaging, but dried fruit and shelled nuts are usually packaged in carton boxes with plastic liner inside. Unshelled nuts that are intended for wholesale are typically packed in jute or plastic bags or ‘polysacks’. They can also be packed in paperboard cartons or wooden boxes.

Within Europe, the standard bulk package is 10 kg but also 12 kg cartons, 12 - 15 kg plywood joint boxes and 25-70 kg linen fabric bags are used. When packaged in corrugated or millboard cartons, the product should be transported on pallets.

The selected packaging size should be such that the dimensions are conformed to the conventional pallet sizes (800x1200 mm and 1000x1200 mm) and cargo units may thus be produced.

Retail packaging includes plastic bags, plastic containers or foil bags.

Picture 7: Cashew nuts export packaging
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 edible nuts and dried fruit?

The Netherlands, Germany, United Kingdom and France offer opportunities for exports of edible nuts and dried fruit. The United Kingdom is the largest European importer of edible nuts while Germany is the largest European importer of dried fruit. Beside these largest markets, opportunities can be found in the growing markets of Central Europe. The products with rising demand are almonds, Brazil nuts, hazelnuts, macadamia nuts and dried prunes.

Imports
- The outlook for import of edible nuts and dried fruit in Europe is positive in the long term and it is expected that imports will continue to increase in the coming years.
- Since 2012, total European imports of edible nuts and dried fruits grew annually by 10% in value reaching €11 billion in 2016. Over the same period import in quantity grew annually by 5% reaching 2.7 million tonnes respectively.
- It seems that in the long term there will be difficulties to supply all demanded quantities of edible nuts and dried fruit, which drives the increasing value. Another reason for the slower growth in volume than in value, which is reflected in an increase of prices, is a general lack of the products on the European market in recent years due to lower harvests in the main production regions.

![Figure 1: European imports of edible nuts and dried fruits by main origin 2012–2016](image)

- The European market for dried fruit and edible nuts is dispersed and there is no single country which dominates the import market. The United Kingdom is the largest importer of dried fruit (see our study about Dried Fruits in the UK). Germany is the largest European importer of edible nuts.
- Central and Eastern European countries are expected to increase imports of edible nuts and dried fruit faster than western Europe.
- Within Europe, the countries with the highest import growth of edible nuts and dried fruit in value in the last five years were Romania (16%), Spain (15%), Italy (15%), Luxembourg (14%) and Belgium (13%).
- Shelled almonds have the highest value of imports with 23% share, followed by shelled hazelnuts (12%), shelled cashew nuts (12%) and shelled groundnuts (8%).
For developing country suppliers, good opportunities can be found in export of Brazil nuts, macadamia nuts and dried prunes. There is also an increasing demand for dried superfruit such as: dried berries (e.g. cranberry, aronia, mulberry), dried physalis and powdered dried superfruit. The highest annual growth of import value in the last five years was in chestnuts (20%), Brazil nuts (19%), almonds (18%), and cashew nuts (17%).

Figure 2: European imports of edible nuts and dried fruit by country in 2016
share of imported quantity

- Around 40% of all European import value is from the United States (mainly almonds, walnuts and dried cranberries) and Turkey (mainly hazelnuts, dried grapes and dried apricots).
- In the range of the first 30 European suppliers of edible nuts and dried fruit, the highest export growth in the last 5 years was recorded in Azerbaijan (annual growth of 59%, mainly hazelnuts), Poland (30%, mainly aronia and dried apples), Vietnam (28%, cashew nuts), Australia (28%, almonds and macadamia nuts), Georgia (28%, hazelnuts) and Slovakia (18%, hazelnuts and dried grapes).
- The major intra-European imports involve both re-exports (e.g. peanuts from the Netherlands), as well as a country’s own production (e.g. almonds in Spain).
**Tips:**

- Identify who are the biggest importers of your product in selected large or fast-growing markets. You can start with the internet search or read more about supply chains in Europe in our Study of [Market channels and segments for Edible Nuts and Dried Fruit](#).

- Besides aiming to export to the largest European importers, consider countries that are experiencing fast growth in imports, such as the Benelux countries and Eastern European countries.

- If you are a new exporter to the European market, consider negotiating with the specialised agents for dried fruit and edible nuts. Reliable specialised agents are present in many European countries but the largest are situated in the Netherlands and in the United Kingdom.

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

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**Exports**

**Growth in export value faster than in volume**

- In terms of value, since 2012 European exports (including intra-European trade) of edible nuts and dried fruits has grown annually by 11% and reached €4.4 billion in 2016. In quantity, exports grew by 5% and reached 988 thousand tonnes in the same period. Faster growth in value than in volume is influenced by the increase of prices in recent years (while theoretically it may also be caused by a shift towards more expensive nuts and dried fruit in the import mix).

- Around 91% of all European exports are intra-European exports.

- European exports mainly consist of re-exports of imported products. Even Spain, which is the largest European producers of almonds, re-exports significant quantities of almonds imported from the USA.
• Among the largest European exporters in last five years, the highest export growth was in Germany (18%, mainly cashew nuts and pistachios), Italy (16%, mainly hazelnuts) and Spain (15%, mainly almonds).

Figure 4: European Union export of edible nuts and dried fruit by country 2016
share of exported quantity

• The main external export destination in 2016 was Switzerland, followed by the United States, Norway and the Russian Federation.

• Among the largest European export destinations, the highest increase of export from the European Union in the last five years was to the Republic of Korea (89% annual export growth, mainly almonds), Moldova (19%, mainly walnuts) and Norway (16%, mainly almonds, groundnuts and mixtures of nuts and dried fruit). Note that the Moldovan increase in imports is influenced by the export of walnuts from France, which is outsourcing walnut shelling to this country.

Tips
• Besides targeting your export to the European Union, you can learn from European exporters and find opportunities in growing markets for edible nuts and dried fruit, such as the Republic of Korea, Norway and Switzerland.

• Learn more about your competitors in our study about Competition in edible nuts and dried fruit.

Production
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.

- Production of edible nuts and dried fruits in Europe has gradually increased since 2012, but decreased in 2016. The cause of the decrease was the lower production of almonds in Spain and dried grapes in Greece.
- The European Union produces more edible nuts than dried fruits. The most produced edible nuts in Europe are hazelnuts and almonds and the most produced dried fruit dried figs and prunes.
- Spain, the Netherlands, the United Kingdom and Italy are major producers of (processed) edible nuts and dried fruits. However, this includes processing such as mixing, roasting, coating and repacking of imported products. In terms of primary production (growing, harvesting and drying), the largest European producers are Spain (led by almonds), Italy (hazelnuts), France (prunes) and Greece (dried grapes).
- Spain is the third largest producer of almonds and fifth largest producer of dried figs in the world. Italy is placed second in hazelnuts production and sixth in dried figs. Greece is the fourth largest producer of dried figs and ninth largest producer of dried grapes. France is the third largest producer of prunes and the seventh world producer of walnuts. Portugal is an important producer of dried figs too. The Netherlands and the United Kingdom are large processors of imported nuts (the main one being peanuts).
- Imported nuts and dried fruits are widely used by the confectionery, baking, and sweets industries for further processing.
- Some of the production (processing) country leaders are: Intersnack (Netherlands), CG Hacking & Sons (UK), V. Besana (Italy), Borges (Spain), Bosch Boden Spies (Germany), Seeberger (Germany), Voicevale (UK), Mariani Packing (USA based but spreading sales to Europe).

**Tips**

- If you are producing almonds, hazelnuts, walnuts, dried grapes, prunes or dried figs, closely monitor production of those products in Europe as in the years with lower harvest more supply will come from external suppliers.
- The largest producing companies often complement their offer with imported dried fruit.
Consumption

The figure above displays the apparent consumption of edible nuts and dried fruit, 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 increased from €4.7 billion to almost €7 billion in 2015 but then dropped again to €4.7 billion in 2016. The decrease in consumption value does not actually reflect a real decrease in the production quantity, but rather fluctuation in production and prices.
- Apparent consumption of edible nuts and dried fruits is showing an increase until 2016. Stimulated by a continuous trend towards healthier lifestyles, it is expected that European consumers will increasingly appreciate edible nuts and dried fruits.
- Although Europe produces only 10% of the world production of tree nuts, it was the largest consumer, with a 25% world consumption share in 2015. Almonds are the most consumed nut in Europe, followed by walnuts and hazelnuts.
- Europe produces around 8% of the world production of dried fruit, but similar to nuts, it is the largest world consumer of dried fruit, with a 26% consumption share in 2015. Prunes and dried grapes are the dried fruits consumed most in Europe.

According to the International Nuts and Dried Fruit Council the largest per capita consumption (including industrial consumption) of the most consumed dried fruit and edible nuts in Europe is represented in the following table:

Table 2: Per capita consumption of the leading European countries in 2015

<table>
<thead>
<tr>
<th>Dried fruit/edible nut</th>
<th>Leading European consumer per capita</th>
<th>Consumption per capita in kg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Almonds</td>
<td>Spain</td>
<td>1.40</td>
</tr>
<tr>
<td>Brazil nuts</td>
<td>United Kingdom</td>
<td>0.098</td>
</tr>
<tr>
<td>Cashew nuts</td>
<td>The Netherlands</td>
<td>1.39</td>
</tr>
<tr>
<td>Hazelnuts</td>
<td>Italy</td>
<td>1.50</td>
</tr>
<tr>
<td>Macadamia nuts</td>
<td>Luxembourg</td>
<td>1.05</td>
</tr>
<tr>
<td>Pecan nuts</td>
<td>The Netherlands</td>
<td>0.197</td>
</tr>
<tr>
<td>Pine nuts</td>
<td>The Netherlands</td>
<td>0.082</td>
</tr>
<tr>
<td>Pistachios</td>
<td>Belgium</td>
<td>0.93</td>
</tr>
<tr>
<td>Nuts/Fruits</td>
<td>Country</td>
<td>Units</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------</td>
<td>-------</td>
</tr>
<tr>
<td>Walnuts</td>
<td>The Netherlands</td>
<td>0.58</td>
</tr>
<tr>
<td>Groundnuts</td>
<td>Germany</td>
<td>1.21</td>
</tr>
<tr>
<td>Dried dates</td>
<td>France</td>
<td>0.40</td>
</tr>
<tr>
<td>Dried apricots</td>
<td>United Kingdom</td>
<td>0.08</td>
</tr>
<tr>
<td>Dried figs</td>
<td>Greece</td>
<td>0.40</td>
</tr>
<tr>
<td>Dried grapes</td>
<td>The Netherlands</td>
<td>2.14</td>
</tr>
<tr>
<td>Prunes</td>
<td>France</td>
<td>0.39</td>
</tr>
</tbody>
</table>

Source: International Nut and Dried Fruit Council

**Tips**

- In targeting your markets, make a distinction between countries that import edible nuts and dried fruits for their own consumption and countries that import products and re-export them to other countries. In the first category, more attention should be paid to developments in retailing sector and local consumption trends.

- Learn more about production, consumption and trade statistics from [International Nut and Dried Fruit Council](#).

3. What trends offer opportunities on the European market for edible nuts and dried fruit?

These trends offer opportunities for developing country exporters:

- Consumer demand in vegan, gluten free and natural food;
- Food safety certification supported with frequent laboratory tests;
- Corporate Social Responsibility standards can additionally provide a great advantage to European markets suppliers.

United Kingdom withdrawal from the European Union consequences:

- On the short term, no significant changes are expected apart from the weaker currency. On the long term, the consumers in the United Kingdom will continue to consume dried fruits and nuts. Also it is expected that the amount of direct imports, rather than through intermediaries, is likely to increase.
- With the weaker English Pound, prices will be more expensive; on the other hand prices of for example sultanas, almonds and walnuts have dropped more than the rate of the Pound towards the dollar.
- At the moment of writing of this report the euro weakened by 2 to 3% as a result of the United Kingdom withdrawal, making imports also for the euro countries somewhat more expensive.

Specific trends for dried fruit and edible nuts:
Low sugar products are in demand on the European market. This trend is not very favourable for dried fruit as it contains higher concentration of sugar compared to fresh fruit. However, it is not expected that this trend will significantly influence consumption of naturally dried fruit. On the other hand, consumption of sugar infused or sugar coated products such as candied dried fruit can be influenced by this trend.

Consumption of superfruit is likely to increase, so the use of freeze drying technology for berries is expected to increase too. Besides, individually dried products consumption of superfruit in powdered forms are also likely to increase.

With respect to Edible Nuts and Dried Fruits, an extensive study about European market trends is already available. See our study about Trends for Processed Fruit and Vegetables.

4. What requirements must edible nuts and dried fruit comply with to be allowed on the European market?

Legal requirements
All foods including dried fruit and edible nuts 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.

Border control
In the event of repeated non-compliance of specific products originating from particular countries, stricter border control may apply. This stricter 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.

Food safety
Currently (July 2017), on the list for the increased control for presence of aflatoxin are groundnuts from Bolivia, Gambia, Madagascar, Senegal and Sudan, hazelnuts from Georgia, and pistachios from the USA. There is also currently increased monitoring of the presence of ochratoxin A in dried grapes from Iran. Beside mycotoxin inspections there are also increased sulphites inspections of imported dried apricots from Turkey and Uzbekistan.

With regard to dried fruits, the notifications remained broadly stable, a total of 121 notifications were registered in 2015 compared with 115 notifications registered in 2014. As in the case of edible nuts, aflatoxins were the main reason for notifying, reaching a total of 47 notifications (39% of total notifications for dried fruits), followed by sulphites with 33 notifications and ochratoxin A with 19 notifications. Dried figs, with 62 notifications, and dried apricots with 33 notifications, were the most notified products.

The new legislation concerning the level of the pesticide Chlorpyrifos has been introduced in 2016. This legislation is supposed to start from the 10th of August in 2016 and can largely affect European imports of dried grapes from Turkey. It appeared to be a very big risk as current remaining crop from Turkey cannot be exported to Europe. This is caused by the widely occurrence of chlorpyrifos.

Labelling requirements
In December 2014, new European 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 and 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 most products.

**Common and niche requirements**

- Food safety certification is a common request by the European importers. The most common certification schemes accepted on the European markets are [IFS](http://ifs-international.com), [FSSC22000](http://www.ifs-international.com) and [BRC](http://www.britishretailcongress.org).
- Environmental protection, organic and fair trade certification schemes are becoming more and more popular in Europe. For organic production you can consider [IFOAM standards](http://www.ifoam.org).
- The European Union regulates both organic food and drink produced and/or processed within Europe and organic goods from elsewhere (Commission Regulation (EC) No. 1235/2008 with [detailed rules concerning import of organic products from third countries](http://europa.eu/en/api/)).
- Organic products can readily be exported to European countries from countries whose rules on organic production and control are equivalent to the EU's - currently Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, Tunisia, Switzerland and the United States. For all other non-European countries, importers can have their organic products certified for import into the European Union by independent private control bodies approved by the European Commission.
- As dried fruit and culinary nuts are common ingredient in Jewish cuisine [Kosher](http://www.kosher.com) certification is becoming more popular among the importers.

**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](http://www.europass-packaging.org).
- Specifically for edible nuts and dried fruit, consult the EU Trade Helpdesk where you can find [European Union legislation](http://ec.europa.eu/trade/). For information on commonly requested standards, check the International Trade Centre's [Sustainability Map](http://www.itc-ites.org), an online tool which provides comprehensive information on over 210 voluntary sustainability standards and other similar initiatives covering issues such as food.
- For an overview of independent certification programmes aimed at environmental protection and corporate social responsibility you can refer to [supply chain of Mars](http://www.mars.com) or to [CSR webpage of Ferrero](http://www.ferrero.com). Both companies are significant users of edible nuts and dried fruit on the European market. For example, Ferrero is the world's largest consumer of hazelnuts.

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5. What competition do I face on the European edible nuts and dried fruit market?

For more information about competition on the European edible nuts and dried fruit market see our [Competition study](http://www.europass-packaging.org).
6. Through what channels can you get edible nuts and dried fruit 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.

Generally, more dried fruit is being repacked for the retail industry and more nuts end up in the food manufacturing industry. However, quantities in channels are different for specific products.

Figure 8: European and EFTA market channels for dried fruit and edible nuts, 2016

Tips
- Decide whether to sell to importer/traders or to importers, packers or manufacturers. The latter category may be willing to pay slightly higher prices and allows building up a long-term relation.
- For more information, see our extensive study about Market channels and segments for Edible Nuts and Dried Fruit.
- To get practical advice 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 edible nuts and dried fruit on the European market?

An indication of margins according to final retail prices for edible nuts and dried fruit is not very precise, as the whole sector contains many different products. The prices also differ between producing countries regarding type, fruit or nut 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 dried fruit or edible nuts.

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: Edible nuts and dried fruit 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 edible nuts</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>
<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 250g)</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: Market researcher compilation based on industry sources

Please note that share of the retail price paid to farmers vary 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 furthermore be higher.

For example, organic and Fairtrade certification, controlled drying, sun drying, sorting or shelling may add value to the products.

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