



Exporting fresh limes to Europe

Imports of fresh limes to the European market grew by nearly 40% in volume between 2012 and 2016. Further growth is expected as a result of the increasing popularity of limes in food preparation and drinks. Exporters from developing countries can take advantage of these developments and offer alternative sources to the dominant supply from Mexico and Brazil. At the same time, the increasing worldwide availability often floods the European market and presses prices down.

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1 . Product definition

Limes have a diameter of 42–67 mm for the Persian lime and 25–45 mm for the Key lime. When ripe, limes are green or turn slightly yellow. They are normally used for flavouring (including the skin).

The most commonly produced lime varieties for fresh consumption are the:

- Persian (or Tahiti) lime (*Citrus latifolia*), popular because of their seedless nature;
- Key (or Mexican) lime (*Citrus aurantifolia*), a smaller variety containing more seeds, making them less popular for fresh consumption.

This study primarily describes the market for Persian lime, because it is the preferred and dominant variety on the European market.

Table 1: CN commodity code for fresh limes

Number	08055090
Product	Fresh or dried limes 'citrus aurantifolia, citrus latifolia'

Source: Eurostat Comext

Product specification

Quality

Limes are divided into three classes: Extra Class, Class I and Class II. Information on the quality requirements for each class is available in the:

- [Standard for limes](#) (Persian limes) in the [Codex Alimentarius](#) (the “food code” of the WHO and the FAO);
- [Standard for Mexican limes](#) (Key limes) in the Codex Alimentarius;
- [UNECE standards for citrus fruit](#);
- [General Marketing Standards of Regulation \(EU\) 543/2011](#).

In all classes, the citrus fruit must be:

- intact;
- free from bruising and/or extensive healed overcuts;
- sound – produce affected by rotting or deterioration such as to make it unfit for consumption is excluded;
- clean, practically free from any visible foreign matter;
- practically free from pests;
- free from damage caused by pests affecting the flesh;
- free from signs of shrivelling and dehydration;
- free from damage caused by low temperature or frost;
- free from abnormal external moisture;
- free from any foreign smell and/or taste.

The development and condition of the citrus fruit must be such as to enable it to:

- withstand transport and handling;
- arrive in satisfactory condition at the place of destination.

Limes must have reached an appropriate degree of ripeness. In addition to having the proper colour (mostly green), the juice content must be at least 40% for Key limes and 42% for Persian limes.

Conformity must be verified before these goods enter the customs territory of the European Community, except in the case of small lots, which the inspection authorities/bodies consider to be low risk. In certain third countries that have provided satisfactory guarantees of conformity, pre-export inspections may be conducted by local inspection bodies.

Tip:

- Limes are to a very large extent bought on outside appearance; the greener the better, and preferably packed tightly within the box in a pattern.

Size and packaging

Limes are classified according to Size Codes 1-5:

Size code	Diameter (mm) of Persian or Tahiti limes	Diameter (mm) of Key or Mexican limes
1	58-67	> 45

2	53-62	40.1-45
3	48-57	35.1-40
4	45-52	30.1-35
5	42-49	25-30

Packaging requirements differ by customer and market segment. At the very least, limes must be packed in such a way as to offer proper protection for the produce. The packaging must be new, clean and of a quality that can prevent damage to the product. Talk to your customers about their requirements and preferences with regard to packaging. Common characteristics are:

- wholesale packaging in cardboard boxes or crates;
- normal-sized crates/boxes containing a net weight of 4-4.5 kg, packed for retail with the limes neatly organised in a pattern with the green side up;
- large boxes containing a net weight of up to 18 kg, destined for clients that re-pack in nets or trays.

For more information on packaging, please see the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruit and Vegetables \(CAC/RCP 44-1995\)](#).

Labelling

Non-retail packaging should have the following particulars:

- name and address of exporter, packer and/or dispatcher, and optionally an identification code;
- name of the produce if the contents are not visible from the outside, and optionally the name of the variety;
- country of origin, and optionally the district where grown, or national, regional or local place name;
- class, size (size code or minimum and maximum diameter in mm), and optionally the net weight;
- optionally, the official inspection mark.

In addition, the label should include any certification logo or retailer logo (in the case of private-label products).

Also see [European Regulation No 543/2011](#).

Which European markets offer opportunities for exporters of fresh limes? [H2]

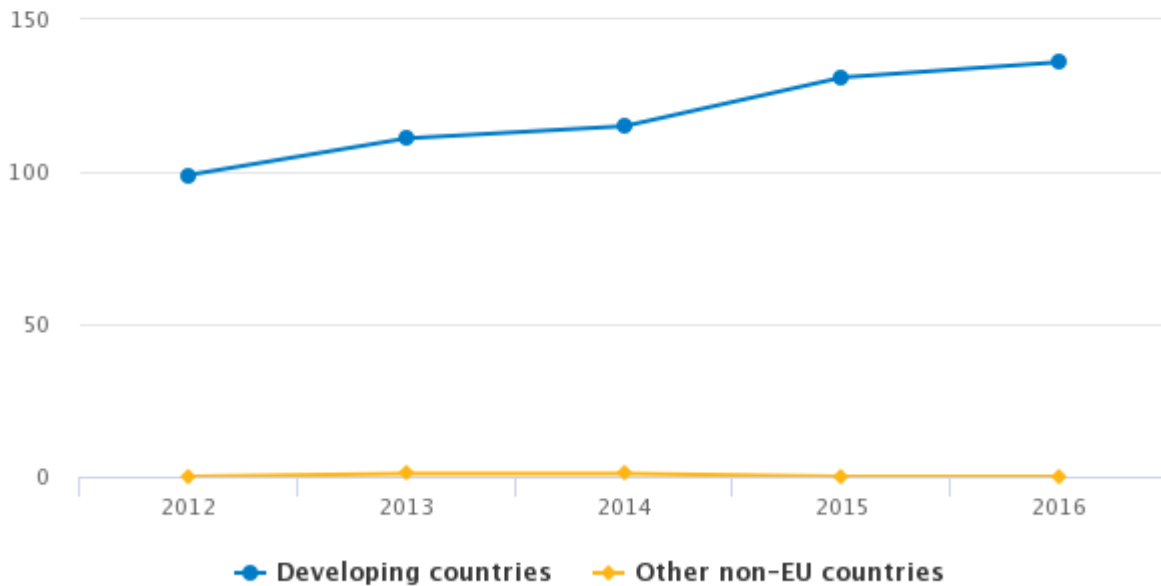
General information and figures about production and trade developments in the European market for fresh fruit and vegetables are provided on the [CBI Market Intelligence Platform](#). This section provides detailed statistics on the trade and consumption of fresh limes in Europe.

Increasing imports from developing countries [H3]

Imports of fresh limes to the European market have increased from 99,000 tonnes in 2012 to 136,000 tonnes in 2016. Practically all imports of fresh limes originate in developing countries, principally Brazil and Mexico. The only developed countries that export limes to Europe are Israel and the United States, and only in very small quantities (see Figure 1).

Figure 1: European import of limes 2012–2016

in 1,000 tonnes



Source: Market Access Database

Significant imports from developing countries to the Netherlands and the United Kingdom [H3]

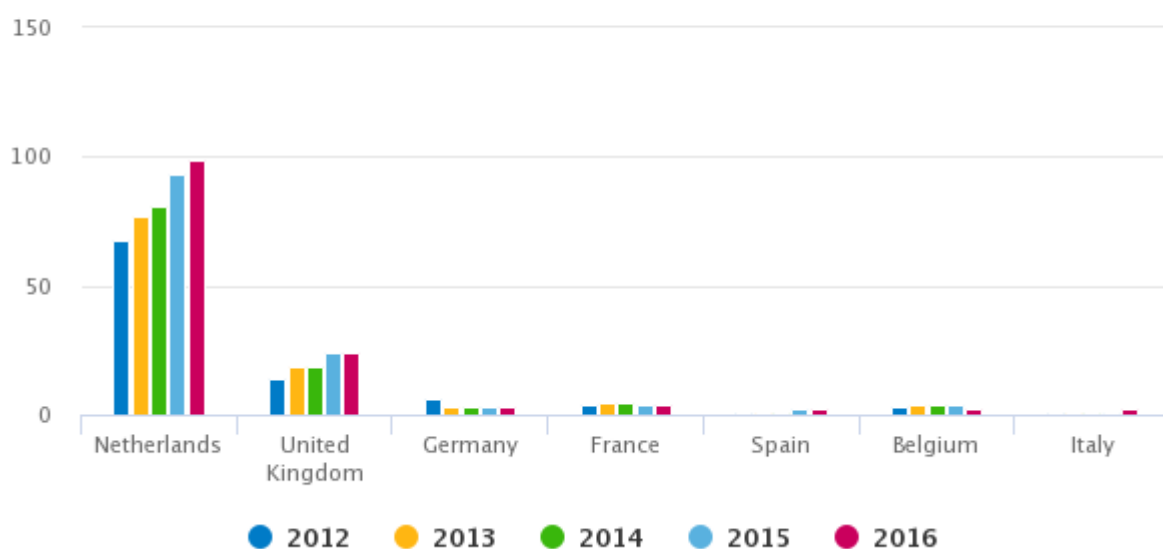
The Netherlands and the United Kingdom have relatively large import volumes from developing countries. The United Kingdom is an end market that you can supply to directly. As well as Belgium, the Netherlands is a typical entry point to greater Europe. Most of this import comprises seedless Persian limes, mainly from Brazil and Mexico. New suppliers from developing countries are emerging, such as Vietnam, Guatemala, Colombia and Peru.

Tips:

- Find a European importer at trade fairs such as [Fruit Logistica](#) in Germany or [Fruit Attraction](#) in Madrid.
- Focus preferably on seedless lime varieties, for which there is a growing demand in Europe given their ease of use in meals and drinks.

Figure 2: Main European importers of limes from non-European countries 2012–2016

in 1,000 tonnes



Source: ITC Trademap

Rapid growth confirms position of the Netherlands as trade hub [H3]

At 99,000 tonnes, the Netherlands is the largest importer of limes. It is also the country that registered the highest import growth in the past years. This increase is a direct result of a growing demand in the Netherlands and in the surrounding countries supplied by the Netherlands. In 2016, the Netherlands re-exported 66,000 tonnes of limes, its main destinations being Germany and France.

Tip:

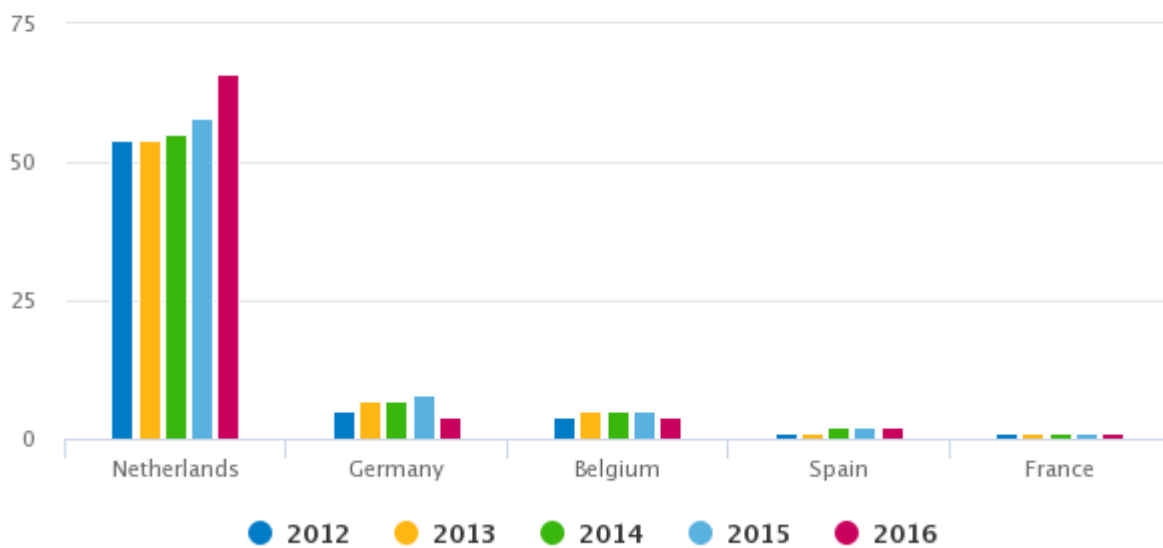
- The Netherlands is by far the largest European trade hub for fresh limes in Europe. Find your importer there and supply to Europe through one partner.

Northern Europe is the main destination

Major destination countries include Germany, France and the United Kingdom. Northern Europe is very relevant for the lime trade, because consumption is high. Eastern European markets such as Romania and Bulgaria are still small, but they are experiencing strong growth. The latter markets often depend on re-exported limes.

Figure 3: Main European exporters and re-exporters of limes 2012–2016

in 1,000 tonnes



Source: ITC Trademap

Tips:

- The [FreshPlaza](#) website has a large amount of topical information, including an [overview of the global lime market](#).
- Subscribe to newsletters in order to stay informed.

2 . Which trends offer opportunities on the European market for fresh limes?

[CBI Trend mapping](#) provides information on general trends in the European market for fresh fruit and vegetables. This section provides details about specific trends on the market for fresh limes.

Limes are becoming popular as ingredient in food and drinks [H3]

Limes are generally used for flavouring meals and they are becoming increasingly popular in combination with tropical drinks or cocktails. Consumers are becoming more familiar with limes and the growth on the European market for fresh limes is expected to continue. The demand for limes is strongest during the European summer.

Convenience fruit

Sales of all seedless fruit varieties are increasing in anticipation of consumer preferences for convenient, easy-to-use produce. The same applies to seedless limes, which are easier to squeeze and mix. The demand for seedless limes is strongest in western Europe.

Tip:

- Discuss the potential of your lime variety with an experienced importer. If possible, choose the most popular seedless variety.

Growing interest in sustainable fruit

In Europe, trends are developing towards more sustainable approaches to the production and processing of fresh fruit. Environmental and social issues are becoming increasingly important. Social and environmental certification schemes include actions aimed at sharply reducing and registering the use of pesticides, taking action to ensure the safety of employees and even including price guarantees for producers.

Certification schemes that are in line with the [Global Social Compliance Programme \(GSCP\)](#) are more likely to be accepted by European supermarkets.

Tip:

- Consult the website of the [Global Social Compliance Programme \(GSCP\)](#) for more information on social and environmental conduct.

Organic niche

The increased attention to health and the environment is also generating interest in organically produced fruit and vegetables. Limes constitute a niche product used as an ingredient or flavouring. Because the skin of the fruit is used as well, consumers are more likely to want organically produced limes. As a result, organic limes are more and more in demand.

Tip:

- Read more about organic farming on the [Soil Association website](#).

3 . With which requirements should fresh limes comply to be allowed on the European market?

Buyer requirements can be divided into:

- (1) musts (requirements that you must meet in order to enter the market), such as legal requirements;
- (2) common requirements (those that most of your competitors have already implemented), which you need to comply with in order to keep up with the market;
- (3) niche market requirements for specific segments.

The food safety requirements for fresh limes are the same as for other fresh fruit and vegetables. You can find a complete overview in the:

- general [buyer requirements for fresh fruit and vegetables](#);
- [Trade Helpdesk](#), which provides an overview of export requirements for fresh limes (code 08055090) per country.

4 . With which legal and non-legal requirements must your product comply?

Minimise pesticide residues

Pesticide residues constitute a crucial issue for suppliers of fruit and vegetables. With the aim of avoiding health and environmental damage, the European Union has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed will be withdrawn from the European market. Note that buyers in several countries such as the United Kingdom, Germany, the Netherlands and Austria set MRLs that are stricter than those specified in European legislation.

Tips:

- Find out which MRLs are relevant for fresh limes by consulting the European [MRL database](#), in which all harmonised MRLs can be found. You can search for your product or for the pesticide used. The database has a list of the MRLs associated with your product or pesticide.
- Reduce the amount of pesticides by applying [integrated pest management](#) (IPM) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.
- Read more about [MRLs on the EU Trade Helpdesk](#). Check with your buyers whether they have any additional requirements for MRLs and pesticide use.

Comply with phytosanitary requirements

Fruit and vegetables exported to the European Union must comply with European legislation on plant health. The European Commission has laid down [phytosanitary requirements](#) in order to prevent the introduction and spread of organisms harmful to plants and plant products in Europe. These requirements are managed by the competent food safety authorities in the importing and exporting countries.

Tip:

- Verify with the [national plant protection organisation](#) or food safety authority in your country whether and under which conditions you can export fresh limes to Europe. These authorities normally work with international standards, but always check with your buyer as well.

5 . Which additional requirements do buyers often have?

GlobalG.A.P. and other certification as guarantee [H4]

Since food safety is a top priority in all European food sectors, you can expect most buyers to request extra guarantees from you in the shape of certification.

The most commonly requested certification for fresh limes is [GLOBALG.A.P.](#), a pre-farm-gate standard that covers the whole agricultural production process, from before the plant is in the ground to the non-processed product (processing is not covered). Whether GLOBALG.A.P. is required also depends on the destination country, market conditions and market channel. For example, it has become nearly impossible to supply northern Europe without GLOBALG.A.P., since it is a standard requirement for most supermarkets.

Examples of other food safety management systems that can be required are:

- British Retail Consortium ([BRC](#));
- International Food Standard ([IFS](#));
- Food Safety System Certification ([FSS 22000](#));
- Safe Quality Food programme ([SQF](#)).

These management systems are supplemental to GLOBALG.A.P. and are recognised by the [Global Food Safety Initiative \(GFSI\)](#).

Tips:

- Identify the food-safety management systems that are usually requested in your target market. Expect GLOBALG.A.P. to be one of them.
- Read more on the various food-safety management systems at the [Standards Map](#) website.
- Always remember that food safety is a major issue. Work proactively with buyers to improve food safety, taking care to be transparent and to remain up to date with regard to buyer requirements and regulations.

6 . What do niche markets require?

Growing demand for organic limes

An increasing number of European consumers prefer food products that are produced and processed using natural methods. The market for organic limes is relatively small, but it has limited supplies. In order to market organic products in the European Union, you must use organic production methods according to [European legislation](#). Furthermore, you have to use these production methods for at least two years before you can market your fresh limes as organic.

In addition, you (or your European importer) must apply for an import authorisation from organic control bodies. After being audited by an accredited certifier, you may put the [European organic logo](#) on your products, as well as the logo of the standard holder; for example:

- [Soil Association](#) (especially relevant in the United Kingdom);
- [Naturland](#) (Germany);
- [Bio Suisse](#) (Switzerland).

Although these standards differ slightly, they all comply with European legislation on organic production and labelling.

Tips:

- Implementing organic production and becoming certified can be expensive, so assess the market potential before making any investments.
- Consult the [Standards Map database](#) for information on the various Organic certifications.
- For the export of organic limes to the European market, use a specialised importer who understands the market and has good access to clients that purchase organic fruit. Use, for example, the [Organic-Bio](#) database.

Fair and sustainable

There is growing attention to the social and/or environmental conditions in the producing areas. Most European buyers have a code of conduct with which they will expect you to comply. For fresh limes, social compliance is important, although product quality has the top priority in day-to-day trade. A few specialised buyers provide extra opportunities for socially certified products.

Implementing [GRASP](#) provides you with a good, basic social certification. GRASP is part of GlobalG.A.P. and is gaining in importance. Other, more complex schemes for social or Fairtrade certification are less common for limes.

Tips:

- For a complete overview of buyer initiatives for social compliance, see the [Buyer requirements for fresh fruit and vegetables](#) on the CBI marketing intelligence platform.
- Examine your company's current performance; for example, by completing a self-assessment on the [BSCI website](#).
- Consult the [Standards Map database](#) for additional information and to learn about differences between Fairtrade labels.

7 . What competition will you be facing on the European market for fresh limes?

For general information about market competition for fresh fruit and vegetables, consult the [Market Competition information](#) available on the CBI market intelligence platform. The platform also includes [Tips for doing business with European buyers](#).

This section provides information about the competition on the European market for fresh limes.

Company competition

The current market for limes is growing and additional growth is expected, although there is a limit to the amount of produce that can be absorbed. Changes in the worldwide supply can have serious consequences for prices.

Almost all of the fresh limes imported to the European market in 2016 originated from Brazil (77,000 tonnes) and Mexico (50,000 tonnes). Limes from Mexico are usually air-freighted. Together, these two countries accounted for 93% of the import volume. If one of these main supplying countries is unable to fulfil the demand due to climatic difficulties or other circumstances, opportunities for suppliers from other countries will increase. To profit as an alternative or new supplier, you must deliver top quality.

Among the emerging suppliers are Colombia, Vietnam, Thailand, Guatemala, Honduras and Peru, each with increasing exports to Europe of between 600 and 3,100 tonnes in 2016.

Tips:

- Try not to compete on price alone, but build partnerships with buyers and strive for excellence in product quality as well as handling.
- Follow publications and news items online, including regular [updates on the lime market](#).

Market entry

The buyer power of large supermarkets is very strong and buyer requirements are very important. Buyers in Europe tend to prefer long-term partnerships as a means of ensuring the supply and quality of products. When there is sufficient supply, expect large retailers to have more influence on the supply chain.

Certification and the need to meet legal as well as non-legal requirements pose major obstacles to producers and exporters entering the market. Nevertheless, the continued growth on the European import market offers opportunities, also for producers from countries other than Brazil and Mexico.

Tips:

- Establish a credible track record of providing transparent information on your company and product quality. Being part of a stable partnership and being a trustworthy supplier can help you to establish and maintain your position on the market.
- The prices of limes fluctuate strongly throughout the year. Find continuity in sourcing programmes that supply to the European retail.

Product competition

Limes are used in food or drinks. In some food applications, lemons are used as substitutes for limes. This fact makes lemons the main competing fruit for your limes.

Tip:

- Use storytelling (highlight, for example, the origin and the grower of your products), novel packaging and premium quality as methods for distinguishing your product from the rest of the field.

8 . Which trade channels can you use to put fresh limes on the European market?

For general information about market channels and segments, consult the [Market Channels and Segments document](#) available on the [CBI market intelligence platform](#). This section provides information about the various channels through which fresh limes are marketed in Europe.

Different market channels throughout Europe

The composition of market channels differs within Europe. Northern countries such as Germany, the United Kingdom, the Netherlands and Belgium have a highly dominant retail channel. France and Spain go one step further with large hypermarkets alongside smaller specialist shops. Countries in the Alpine region (e.g. Switzerland and Austria) are more favourably disposed towards small local shops.

Branding of limes

Importers/distributors differ in their relationships with the retail sector. Some are suppliers for private-label products, while others have their own brands or market the brands of specific producers (cooperation). Branding can help to establish your company in Europe, but limes can also

be sold without a brand name or under private labels in shops and supermarkets.

Catering is an important segment for limes

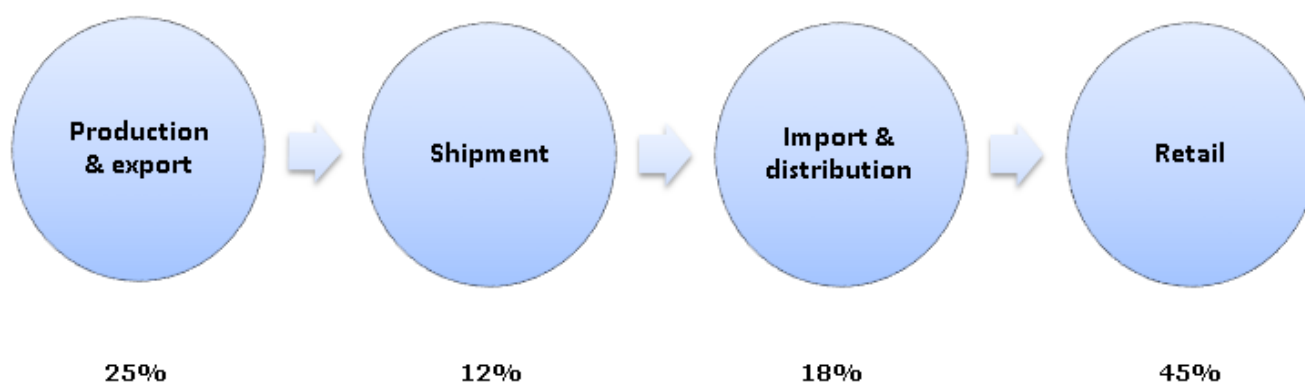
Because limes are popular in tropical drinks and as an ingredient in meals, the catering industry and restaurants are an important segment. The catering industry is often supplied indirectly through wholesalers and cash-and-carry formulas.

Tips:

- Find trade partners or clients at trade fairs such as [Fruit Logistica](#) or [Fruit Attraction](#). Choose an importer based on the size of your company or strategy.
- Consider establishing a brand, possibly in cooperation with a European partner.

9 . What are the end-market prices for limes?

Figure 4: Consumer price breakdown for limes



The product value of limes has been in an upward trend for several years. Price fluctuations and risks should always be considered with regard to niche products such as limes.

The European market is heavily dependent upon two leading suppliers, Brazil and Mexico. If one of these countries were to experience climatic difficulties, prices can change quickly, offering opportunities for exporters that can supply good quality.

In supermarkets, consumer prices vary from around € 0.50 up to € 1.00 apiece. Prices are lower at street markets, where limes are sold in quantities of 5 to 12 for € 1 in total. Organic limes can be sold for approximately 50-100% more in shops.

Tips:

- Find information about current lime prices on the [Fresh fruit portal](#). Be aware that these prices are indicative wholesale prices and that the actual sales prices may deviate.
- For consumer prices, consult the online shops or ranges of supermarket chains, including [Tesco](#), [Albert Heijn](#) (search for “limoen”) and [Carrefour](#) (search for “citron vert”).

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