



## Exporting fresh limes to Europe

Imports of fresh limes to the European market grew by 33% in volume between 2013 and 2017. 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 easily floods the European market and pressures prices down. As a supplier, you must be aware that prices for limes in Europe are often unpredictable.

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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 slightly turning 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) limes (*Citrus aurantifolia*), a smaller variety containing more seeds, making them less popular for fresh consumption.

This study primarily described the market of the Persian limes, because this is the preferred and dominant variety for 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](#) ('food code' of WHO and 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 of 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 of any visible foreign matter
- practically free from pests
- free from damage caused by pests affecting the flesh
- free of signs of shrivelling and dehydration
- free of damage caused by low temperature or frost
- free of abnormal external moisture
- free of any foreign smell and/or taste.

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

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

Europe allows the use of white and yellow beeswax, yellow beeswax, candelilla wax, carnauba wax and shellac on citrus fruit. However, due to the increased use of lime segments (with skin) in for example cocktails and beer, clients often have specific preferences on fruit preservation or require non-waxed limes.

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 European Community customs territory, 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.

#### Tips:

- Limes are for a very big part bought on outside appearance. The greener the better and preferably packed tightly in the box in a pattern.
- Find the full list of which additives, such as waxes, are permitted in [REGULATION \(EU\) No 1129/2011](#). Also discuss with your buyer if there are specific preferences.

### 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
- boxes containing a net weight of 4-4.5 kg, with such normal sized crates/boxes packed for retail with the limes neatly organised in a pattern with the green side up
- boxes with citrus fruit can hold up to 18 kg, with such large boxes destined for clients that repack in nets or trays.

For more information on packaging please see the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits 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, 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
- official inspection mark (optional).

In addition, the label should include any certification logo or retailer logo (in the case of private-label products). Make sure to discuss any additional requirements with your buyer.

See also the [European Regulation No 543/2011](#).

## 2 . Which European markets offer opportunities for fresh lime exporters?

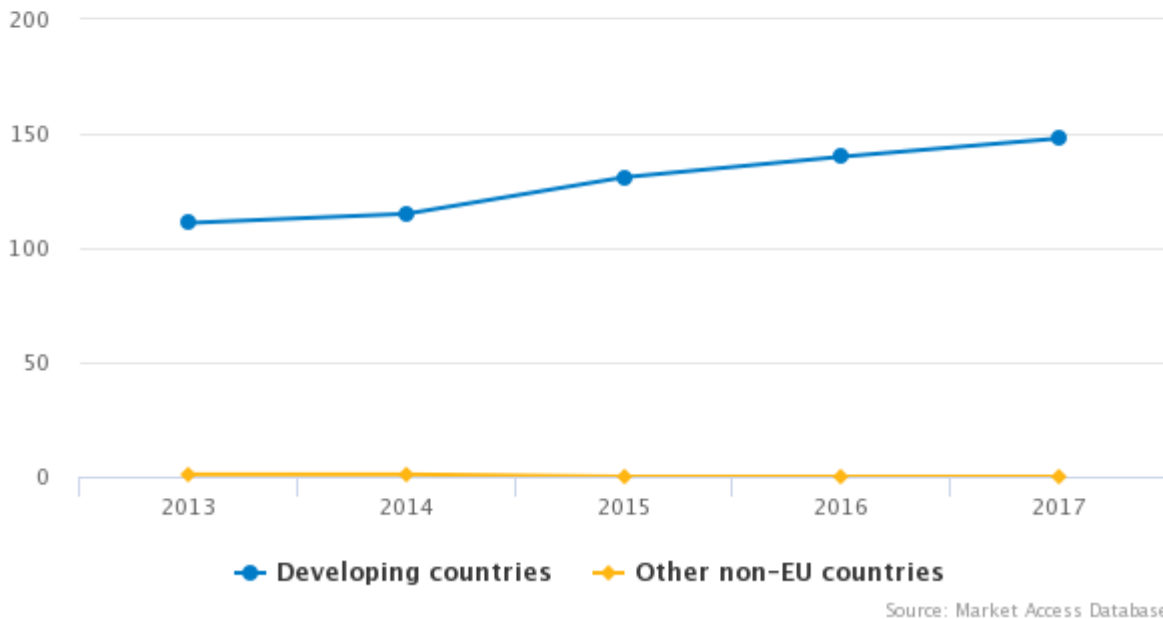
General information and figures about production and trade developments in the European market for fresh fruits and vegetables are provided on the [CBI Market Intelligence Platform](#). This section provides detailed statistics on the trade and consumption of fresh limes in Europe.

### Increasing imports from developing countries

Imports of fresh limes to the European market increased from 111 thousand tonnes in 2013 to 148 thousand tonnes in 2017. 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

in 1,000 tonnes



## Significant imports from developing countries to the Netherlands and the United Kingdom

The Netherlands and the United Kingdom import relatively large volumes from developing countries.

The United Kingdom is an end market that you can supply directly. Besides Brazil and Mexico, Guatemala and Peru are also among its suppliers with respectively 939 and 478 tonnes.

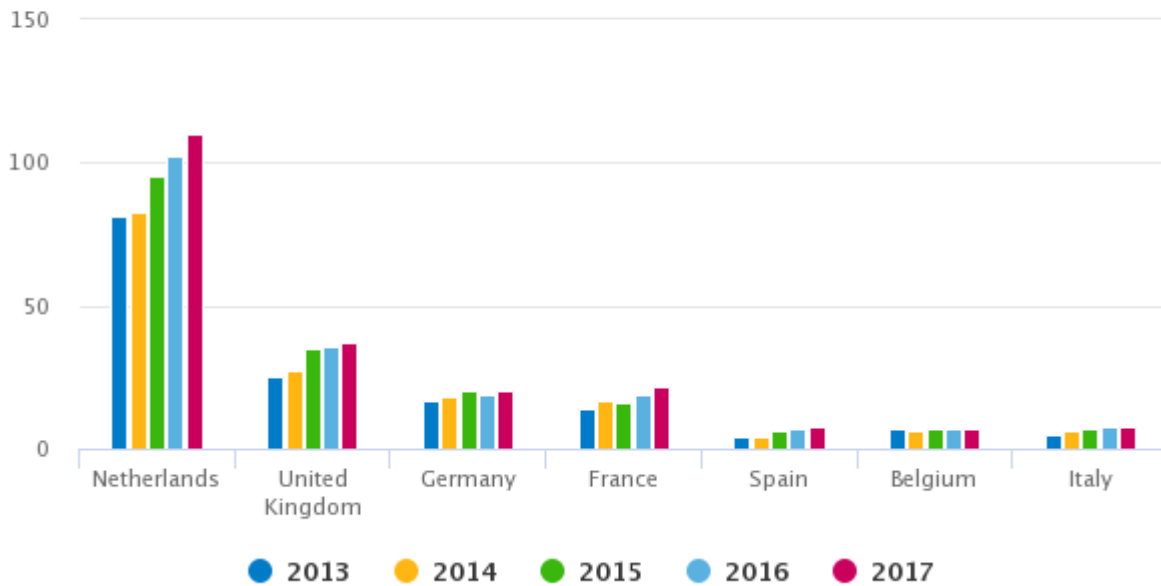
The Netherlands is a typical entry points into greater Europe. Most of this import comprises seedless Persian limes, mainly from Brazil and Mexico. New suppliers from developing countries are emerging, such as Vietnam, Guatemala, Colombia and Peru. For example, Vietnam increased its exports to the Netherlands from 651 tonnes in 2013 to 4,140 tonnes in 2017.

### 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

in 1,000 tonnes



Source: ITC Trademap

## Fast growth confirms its position of the Netherlands as trade hub

With 110 thousand tonnes, the Netherlands is the largest importer of limes. It is also the country that registered most import growth in recent years. This is a direct result of a growing demand in the Netherlands and surrounding countries supplied by the Netherlands. In 2017, the Netherlands re-exported 93 thousand tonnes of limes, with its main destinations being Germany, France and the United Kingdom.

### Tip:

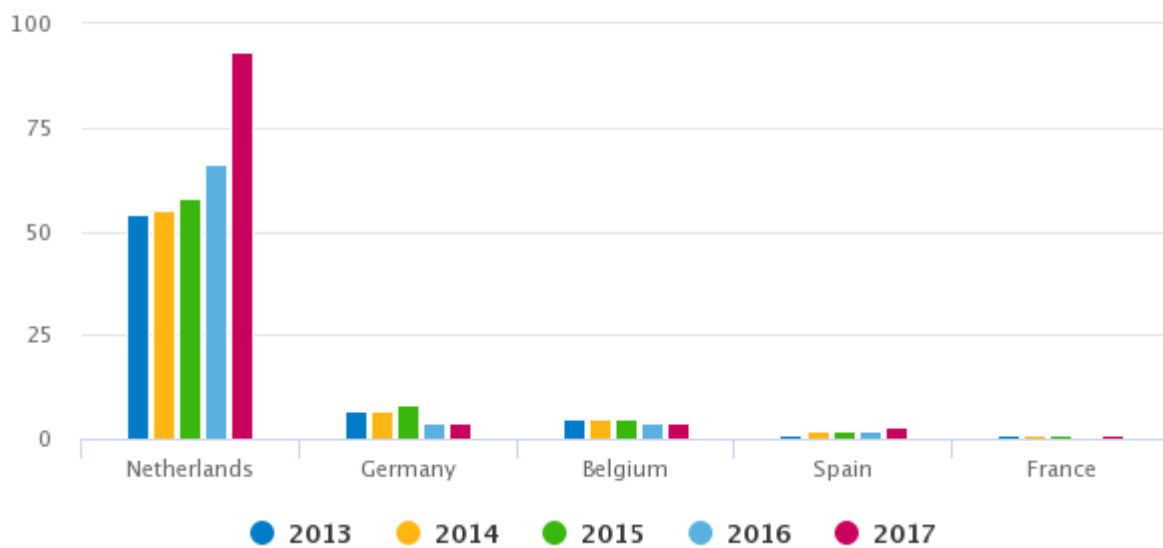
- The Netherlands is by far the largest European trade hub for fresh limes in Europe. Find your importer there, and supply Europe through one partner.

## 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. These latter markets often depend on re-exported limes.

Figure 3: Main European exporters and re-exporters of limes

in 1,000 tonnes



Source: ITC Trademap

Statistical figures 2017 are still subject to change

### Tips:

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

## 3 . 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 fruits and vegetables. This section provides details about specific trends in the fresh lime market.

### Limes are becoming popular as ingredient in food and drinks

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 in 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 on 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/or 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 [Global Social Compliance Programme \(GSCP\)](#) website for more information about 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. Therefore organic limes are more and more in demand. Furthermore, it may present an opportunity for smaller supply countries to compete with the large conventional volumes from Mexico and Brazil. A recent example is a Dutch distributor that started an [organic lime project in Colombia](#) in 2017.

### Tip:

- Read more about the principles of organic agriculture on the [website of IFOAM Organics International](#).

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

Buyer requirements can be divided into:

- (1) musts (requirements you must meet in order to enter the market), such as legal requirements,
- (2) common requirements (which are those most of your competitors have already implemented), the ones you need to comply with in order to keep up with the market, and
- (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 and at the:

- general [buyer requirements for fresh fruit and vegetables](#)

- [Trade Helpdesk](#) that provides an overview of export requirements for fresh limes (code 08055090) per country.

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

### Minimise pesticide residues

Pesticide residues constitute a crucial issue for suppliers of fruits 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. There is also a growing demand for 'chemical-free' limes, meaning without MRLs.

### 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 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 European Commission website on food safety](#). Check with your buyers if they have any additional requirements regarding 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](#) 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 if 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

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 ([FSS22000](#))
- 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, be transparent and remain up to date with regard to buyer requirements and regulations.

## 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 with 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).

Some of these standards differ slightly, but they all comply with the 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 about 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.

## Social and environmental compliance

There is growing attention for the social and/or environmental conditions in the producing areas. Most European buyers have a code of conduct which they will expect you to adhere to. As regards fresh limes, social compliance is important, and for most large retailers it is a must, although in day-to-day trade product quality has top priority. 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 gaining in importance. Other, more complex social or fair trade certification schemes are less common for limes.

Another good option is implementing standards recognised by the [Sustainability Initiative Fruit and Vegetables](#) (SIFAV). This comprises an initiative from traders and retailers to become 100% sustainable in sourcing from Latin America, Africa and Asia by 2020.

### 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 [amfori/BSCI website](#).
- Consult the [Standards Map database](#) for additional information and to learn about differences between fair-trade labels.

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

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

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

### Company competition

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

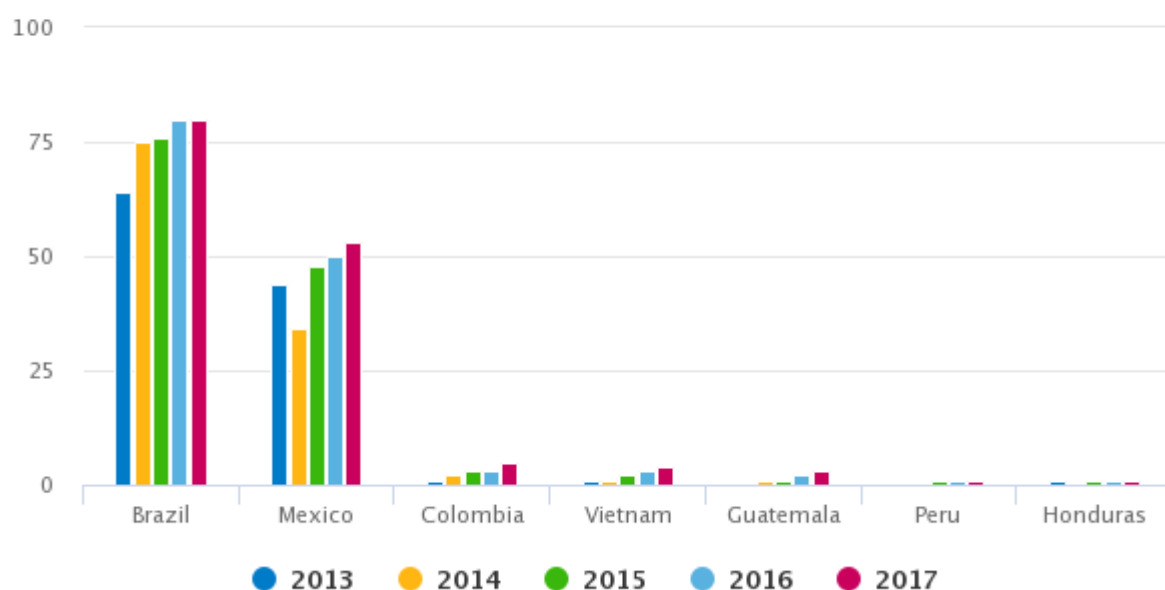
Almost 90% of the fresh limes imported on the European market in 2017 originated from Brazil (80 thousand tonnes) and Mexico (53 thousand tonnes). Limes from Mexico are usually air-freighted. If one of these main supplying countries is unable to fulfil the demand due to climatic difficulties or other 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, Guatemala, Peru and Honduras, each with

increasing exports to Europe of between 0.6 and 5.2 thousand tonnes in 2017.

Figure 4: Main suppliers of limes to Europe

in million tonnes



Source: Market Access Database

### Tips:

- Try not to compete on price alone, but build partnerships with buyers and strive for excellence in product quality and handling instead.
- 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 both legal and non-legal requirements pose major obstacles to producers and exporters entering the market. Nevertheless, the continued growth in the European import market offers opportunities, including 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 a trustworthy supplier can help you to establish and maintain your position in the market.
- Prices for limes fluctuate strongly throughout the year. Find continuity in sourcing programmes supplying European retail.

## Product competition

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

### Tip:

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

## 7 . 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 establish your company in Europe, but limes can also be sold without a brand name or under private labels in shops and supermarkets.

### Food service is an important segment for limes

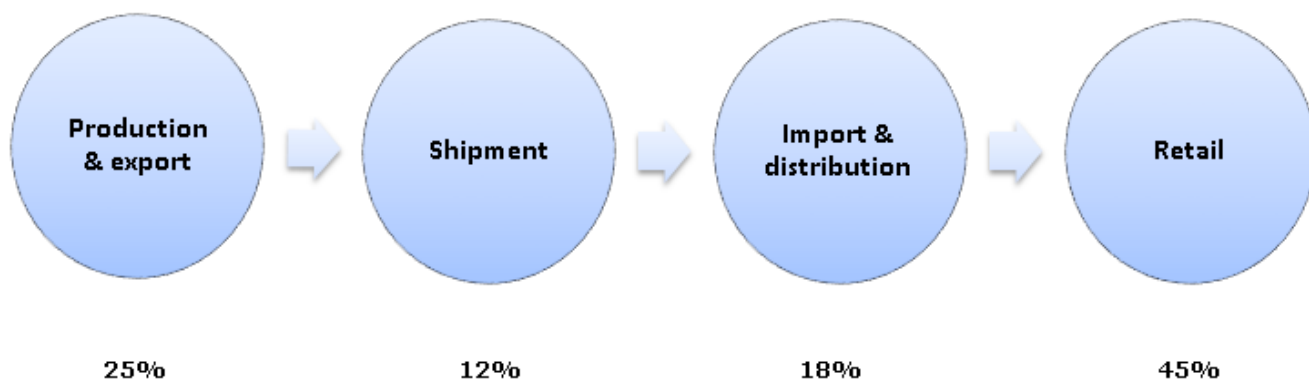
Because limes are popular in tropical drinks and as an ingredient in meals, the food service industry and restaurants are an important segment. The food service industry is often supplied indirectly through wholesalers and cash-and-carry formulas.

### 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.

## 8 . 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 apiece. Prices are lower at street markets, where limes are sold in quantities of 5 to 12 pieces for €1. Organic limes can be sold for approximately 50-100% more in shops.

### Tip:

- 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'). Be aware that retail prices often have little relation to trade prices.

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