Exporting stone fruit to Europe

Opportunities for exporters of stone fruit to Europe are mainly counter-seasonal during the winter months, because southern European countries produce lots of stone fruit in the European summer. The European import value of stone fruit from developing countries increased annually until 2013, but slowed down in 2014 due to the Russian embargo. The import recovered quickly thereafter. Plums and cherries are among the most commonly imported stone fruit, but special qualities or new varieties such as Paraquayos peaches can also be promising.

Contents of this page

1 . Product definition

Apricots, cherries, nectarines, peaches and plums all belong to the stone fruit of the genus Prunus. Stone fruit are also known as drupes, which refers to a fleshy fruit with a hard inner layer, or stone, that surrounds the seed.

Stone fruit is divided into freestone or clingstone fruit:

- The term freestone refers to when the stone can easily be removed from the flesh. Freestone fruit is preferred when end-users want to use the fruit as a whole and removal of the stone is possible by hand.
- If the flesh is strongly tied to the inner pit of the fruit the term clingstone is used. Clingstone fruit is more often used as an ingredient in all sorts of ways.

Table 1: Combined Nomenclature (CN) commodity code for fresh apricots, cherries, plums, peaches and nectarines

Number	Product
08091000	Fresh apricots
08092100	Fresh sour cherries prunus cerasus
08092900	Fresh cherries (excl. sour cherries)
08093010	Nectarines, fresh
08093090	Peaches, fresh (excl. nectarines)
08094005	Fresh plums
08094090	Fresh sloes

Source: Eurostat Comext.

Quality:

Import of fresh fruits and vegetables from third countries to the EU must conform to general standards. These standards can be found in the General Marketing Standards of Regulation (EU) No. 543/2011. Annex 1 of this regulation summarises the minimum requirements, requiring that products should be:

- intact, clean and sound;
- (practically) free of pests, damage, abnormal external moisture, internal browning;
- in a condition to withstand transport and handling.

For fresh peaches and nectarines, a specific EU Marketing Standard exists.

Requirements for quality, size and tolerances for stone fruit can also be found in the United Nations Economic Commission for Europe (UNECE) standards. UNECE standards are used by governments, producers, traders, importers and exporters, and other international organisations. For each type of fruit, specific regulations are available such as:

- apricots (including hybrid varieties of plums looking like apricots)
- peaches and nectarines
- cherries
- plums

Stone fruit is classified in three classes:

- “Extra Class” are products of superior quality that are free of defects or contain only very slight superficial defects that do not affect the general appearance of the product.
- “Class I” are products of good quality that can only contain slight defects in shape, colouring,

skin and stalk.
- Fruit that satisfy with the minimum requirements but do not qualify for Class I or Extra Class can enter the EU classified as “Class II”.

In addition to the requirements above, peaches and nectarines should be free of fruit split at the stalk cavity.

- The development and state of maturity of the apricots must be such as to enable them to continue their ripening process and to reach a satisfactory degree of ripeness. The colour characteristic of the variety must be present on at least 30 per cent of the least ripe fruit surface.
- Tolerance levels are set for each quality and size class. See the abovementioned general and specific marketing standards for the specific tolerances for apricots, peaches & nectarines and cherries. Keep in mind that buyers may be much stricter than minimum legal requirements.

Size:

For peaches and nectarines, the EU Marketing Standard states the size classes.

Table 2: Size codes for fresh peaches and nectarines

	Code	diameter		weight	
		From (mm)	To (mm)	From (g)	To (g)
1	D	51	56	65	85
2	C	56	61	85	105
3	B	61	67	105	135
4	A	67	73	135	180
5	AA	73	80	180	220
6	AAA	80	90	220	300
7	AAAA	>90		>300	

Source: EU Marketing Standard for fresh peaches and nectarines.

- For apricots, cherries, and peaches and nectarines, the UNECE standards explain the guidelines for the minimum size of the produce and size uniformity depending on the Quality Class. Size tolerances occur but uniformity is compulsory for Extra Class and Class I.
  - The minimum size for all apricots is 30 mm.
  - For cherries, the minimum size is 20 mm in “Extra Class” and 17 mm in Classes I and II.
  - Size requirements in plums are based on the combination of variety and class: large fruit varieties in “Extra Class” can have a minimum size requirement of 35 mm, while Mirabelles and

Damsons in Class II demand a minimum size of only 17 mm. Check the requirements in Section III, with the provisions concerning sizing for plums.
- For peaches and nectarines, additional size codes can be demanded ranging from D (51–55 mm diameter or 65–85 g weight) to AAAA (>90 mm diameter or >300 g weight). See the UNECE Marketing Standard on peaches and nectarines.

Packaging:

- Packaging requirements differ between customers and market segments. They must at least be packed in new, clean and quality packaging to prevent damage and protect the product properly. Discuss packaging requirements with your buyers. Some general characteristics are:
  - Wholesale packaging is in cardboard boxes or wooden crates. These boxes can vary in size. Most produce is sold in 3- to 5-kg boxes.
  - Retail packaging: In European retail apricots, nectarines and peaches are sold right out of the wholesale box or in ½- or 1-kilogram plastic boxes. Cherries and plums are usually sold in ½-kilogram plastic boxes.

Labeling:

- To protect the right for consumers in the EU to access useful and appropriate information, Regulation (EU) No. 1169/2011 establishes the general principles, requirements and responsibilities governing food information and in particular food labelling.
- Each package must bear the following particulars, in letters grouped on the same side, legibly and indelibly marked, and visible from the outside.
  - Identification: Information about the packer/dispatcher and or shipper;
  - Nature of the product: The name of the product (e.g. “Peaches” or “Nectarines”) if the contents are not visible from the outside. For peaches and nectarines, the colour of the flesh. Optionally, the name of the variety;
  - Country of origin of the product;
  - Commercial specifications: Class, size or size code, number of units (optionally);
  - Traceability code;
  - Official control mark (optional);
  - If GlobalG.A.P. certified, the GGN number.
- Checks on conformity must be carried out 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 third-party countries that provide satisfactory guarantees of conformity, pre-export checks may be carried out by domestic inspection bodies. For the mentioned fruits, no specific additional regulations are enforced.

2 . What is the demand for fresh stone fruit in Europe?

General information and figures about production and trade developments in the European market for fresh fruit and vegetables are provided in the CBI Trade Statistics for Fresh Fruit and Vegetables on the CBI Market Intelligence Platform.

This section provides you with more detailed statistics about trade and consumption of fresh stone fruit in Europe.

Import

Figure 1: Origin of European import of stone fruit, 2012–2016

in 1,000 tonnes

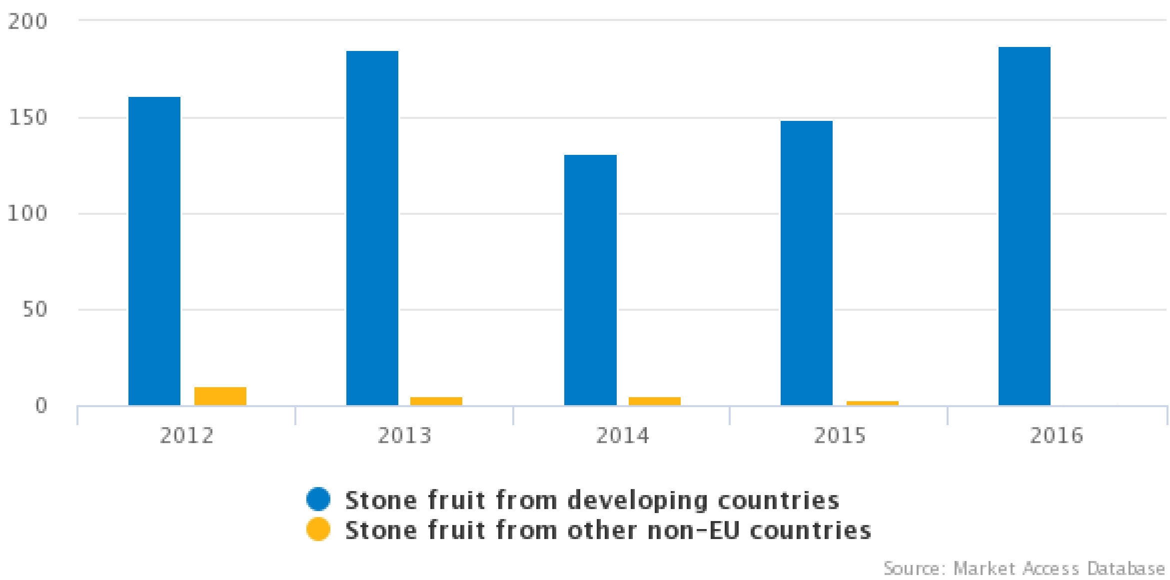


Figure 2: European import of stone fruit per variety, 2012–2016

in 1,000 tonnes

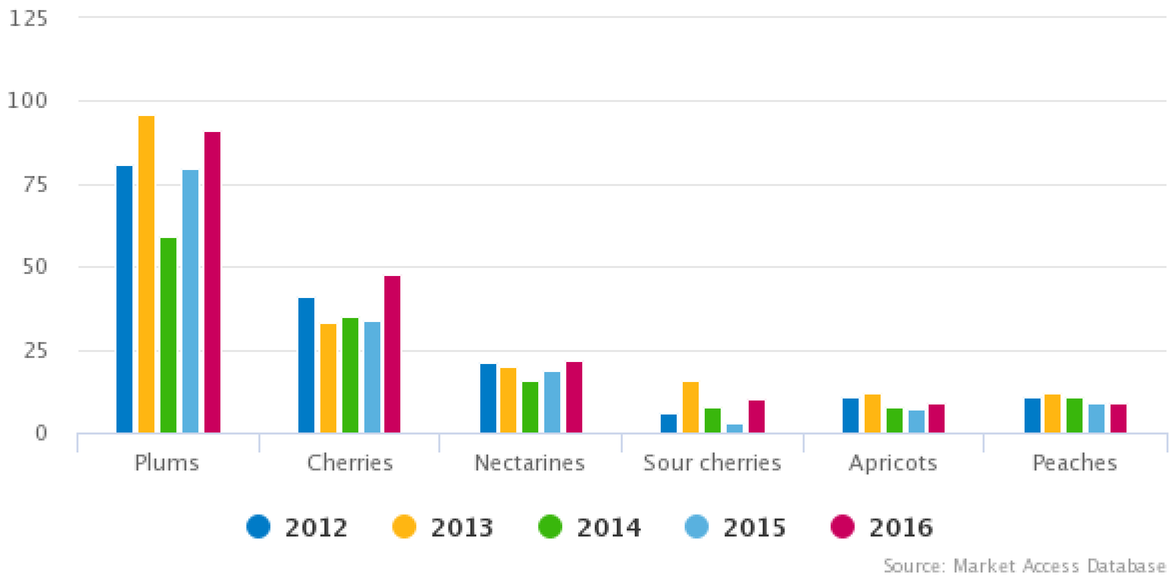
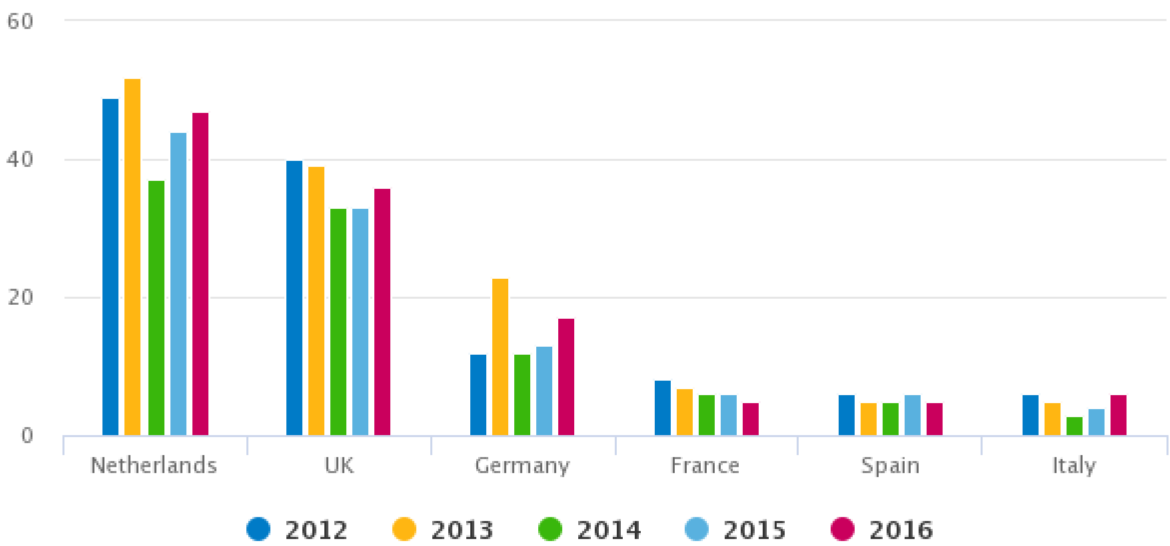


Figure 3: Main European importers of stone fruit from non-European countries, 2012-2016

in 1,000 tonnes



Source: Market Access Database

Interpretations and opportunities

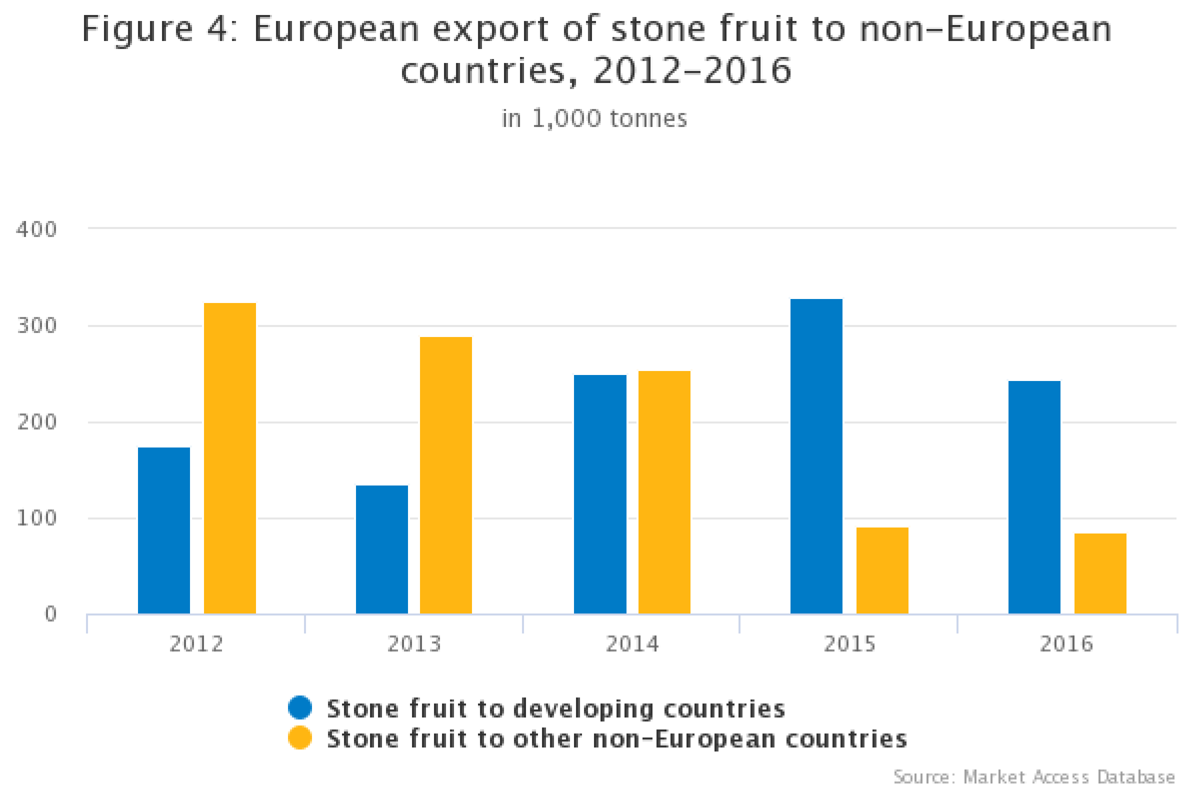
- The majority of Europe's stone fruit is imported from other EU Member States (see Figure 5 for the main European suppliers). In 2014 and 2015, the EU had to absorb more stone fruit from local production due to the Russian trade embargo. This resulted in an almost 30% decrease in imports from developing countries compared to 2013. In 2016, this import volume recovered completely.
- Almost half of the 188,000 tonnes of stone fruit from developing countries is imported by the Netherlands and the United Kingdom. The Netherlands re-exports most of these to other European markets, while the United Kingdom is mostly an end market.
- When including intra-European trade figures, Germany is the largest importing country of stone fruit in Europe with 474,000 tonnes in 2016. After Germany, the largest importers are France (216,000 tonnes), the UK (180,000 tonnes), Italy (146,000 tonnes) and Poland (110,000 tonnes).
- Because Europe produces stone fruit in large volumes, imports from developing countries are mainly counter-seasonal from January to March and mostly to northern European countries. The largest suppliers from outside Europe are Turkey, South Africa and Chile.
  - Turkey is an important supplier of fresh cherries to the EU (43,000 tonnes in 2016), also during the European seasonal months June and July;
  - South Africa is a main supplier of plums (44,000 tonnes);
  - Chile exports both plums and cherries (21,000 and 10,000 tonnes, respectively).
- There is a slightly growing market for stone fruit in Europe, but competition is fierce. Importers in the European market favour larger producers because of supply certainty.

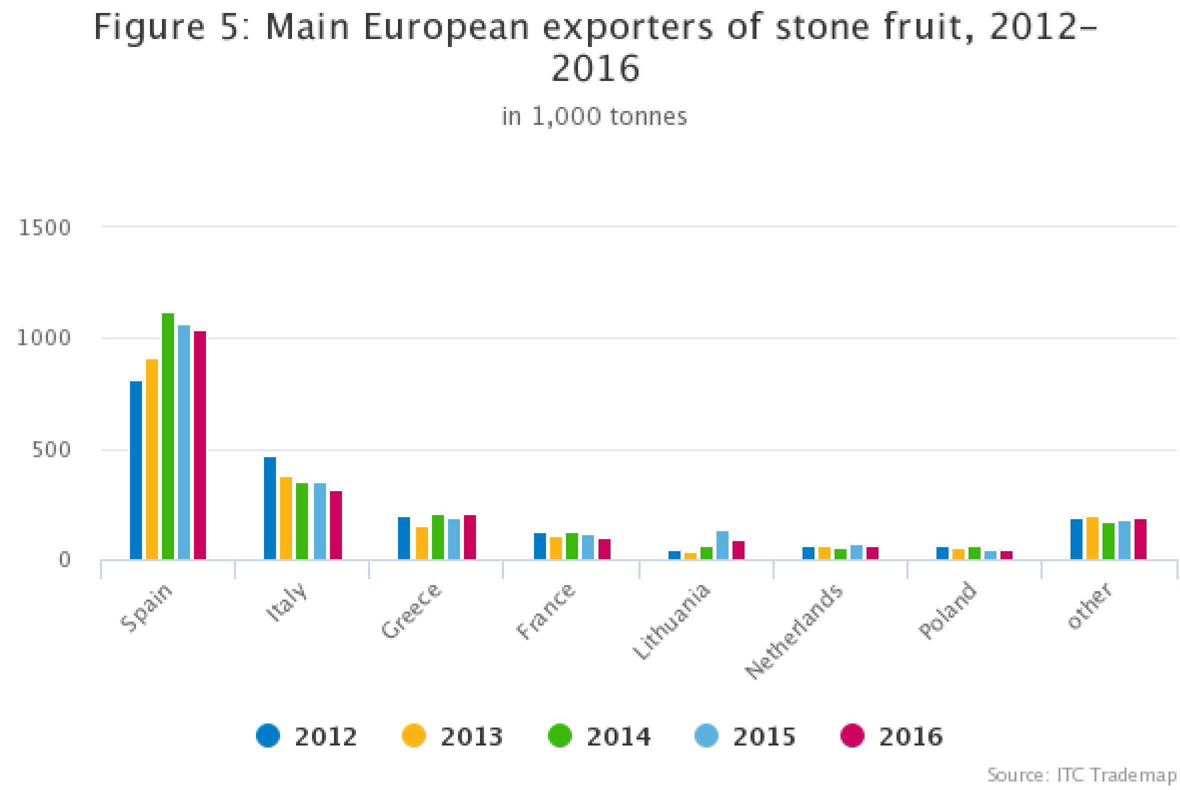
Tips:

- Make sure that your product is competitive and of high quality. Maintain the quality throughout the season and find reliable partners in the EU to optimally benefit from the growing demand.
- Find a European importer by presenting yourself at trade fairs such as Fruit Logistica.

- Consider using the established trade routes and find an importing partner in the Netherlands. The Netherlands has become the dominant importing country from developing countries in Europe.

Export





Interpretations and opportunities

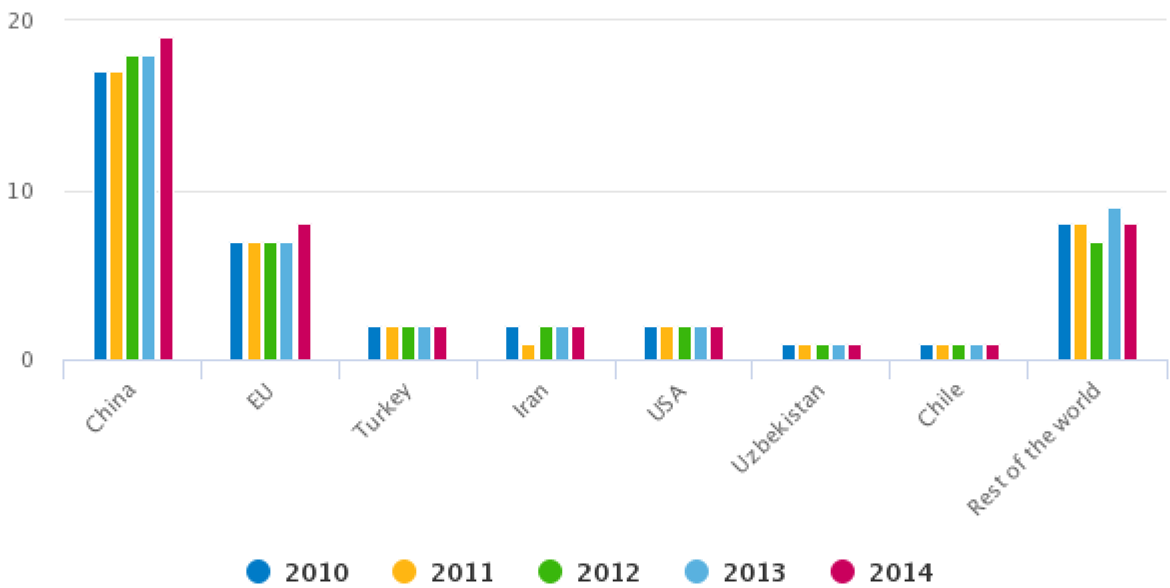
- In the past five years, annual European export varied between 330,000 and 506,000 tonnes. This means that Europe exports more stone fruit than it imports.
- The principal change is the decrease of exports to Russia from 177,000 in 2014 to less than 2,000 tonnes in 2016, while exports to Belarus increased from 87,000 to a peak of 195,000 tonnes in 2015.
- Spain is the biggest exporter of stone fruit in Europe, with a share of around 50%. Spanish export of fresh stone fruit comes primarily from the domestic production of peaches and nectarines.

Tip:

- Discuss with your buyer the timing and potential demand for your product. Cherries can offer opportunities during the off-season as well as in-season, while the market for peaches is often saturated due to the large European production.

Figure 6: Worldwide production of stone fruit, 2010–2014

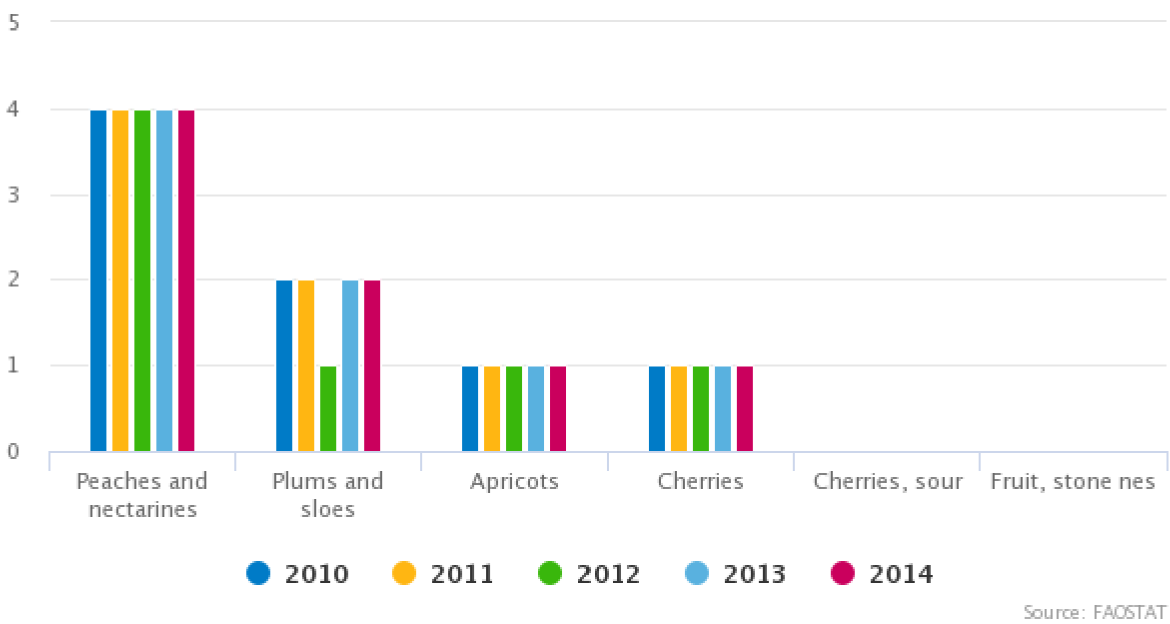
in million tonnes



Source: FAOSTAT

Figure 7: European production of stone fruit, 2010–2014

in million tonnes



Interpretations and opportunities

Worldwide production

- The annual worldwide production of stone fruit is 38–42 million tonnes. Almost half of worldwide production of stone fruit originates in China, but this is mainly for the domestic market. Stone fruit that is not for Chinese domestic consumption is exported mostly to Vietnam, Russia and Kazakhstan.
- Other large producing countries outside Europe include Turkey, Iran and the USA (all around 1.7 to 1.8 million tonnes in 2014).
- Uzbekistan leads the global production of apricots, followed by Turkey.

European production

- Spain and Italy are the main EU producers of stone fruit. Together, they produced around 4 million tonnes out of the total 7.7 million tonnes of stone fruit produced in the EU.
- A vast majority of apricots, peaches and nectarines produced in Europe originate from the Mediterranean countries Italy, France, Spain and Greece. In 2013, these countries produced almost 0.7 million tonnes of apricots and 4.1 million tonnes of peaches and nectarines.
- Spain is a fast-growing competitor for peaches in the EU thanks to increasing popularity of varieties such as Paraguayos (wild peaches) and Platerinas (flat peaches).
- Cherry production takes place in almost every country of Europe. Nevertheless, the demand often exceeds the supply, which makes cherries one of the most lucrative imported products. Turkey (in summer) and Chile (in winter/off-season) are the main non-European suppliers on the European market. During the summer months, Canada and the USA also supply fresh cherries to Europe.
- The annual European production of plums amounts to 1.5 million tonnes, of which one third is produced in Romania. Chile and South Africa are the principle (off-season) suppliers to the EU.
- Due to different weather conditions, the production of stone fruit fluctuates. Unfavourable weather circumstances in Europe will increase the opportunities for exporters from developing countries

Tips:

- Investigate the potential of new varieties. Varieties such as the Paraguayo peach are increasingly popular in production country Spain as well as on the northern European markets.
- Make sure that you stay informed about climate conditions in Europe and use them to your benefit. Always be well informed about EU import requirements and maintain good contact with important buyers in order to jump in when EU production is low.
- Find the latest production statistics for fresh stone fruits production at FAOSTAT.

Consumption

- Exact figures about fresh stone fruit consumption in Europe are not available. Based on import, export and production statistics, the EU consumption is estimated to be around 7.5 million tonnes according to the latest available data from 2014.
- The largest producing countries for stone fruit in Europe are also the main consumption markets (Italy, Spain, Greece, France). Consumption in these cases includes the processing of locally produced stone fruit.
- European consumption is growing slightly. Novelties and (temporary) shortfalls in supply influence stone fruit prices and consumption levels. In the medium run, the overall European demand is expected to increase just slightly.
- Stone fruit is considered a seasonal product by most European consumers. Consumption peaks around the traditional harvesting months in early summer.

Tip:

- Avoid the mistake of prioritising quantity over quality when exporting to a growing market. In the end, wholesalers and retailers demand good-quality produce and trustworthy suppliers.

3 . Which trends offer opportunities on the European market for fresh stone fruit?

CBI Trend mapping provides you with general trends in the European market for fresh fruits and vegetables. This section provides more details about specific trends in the market for fresh stone fruits.

Growing interest in sustainable fruit: Consumption of fresh fruit in Europe is developing towards a more sustainable approach to production and processing. Environmental and social issues are becoming more and more important. Social and environmental certification schemes include actions to strongly reduce and register the use of pesticides, take action on the safety of employees and/or even include price guarantees for producers. Certification schemes that are in line with the *Global*

Social Compliance Programme (GSCP) will have a higher chance of being accepted by European supermarkets.

It is expected that buyers will increasingly pay attention to the local impact of fruit production on the environment. Retailers are increasingly sensitive to reputational damage from selling produce with adverse effects on the environment or your local community.

On a general level, food safety, Corporate Social Responsibility (CSR), social compliance, health and increasing attention to natural production methods are identified as key social trends in the European market for fresh fruit and vegetables.

Tips:

- Check the Global Social Compliance Programme (GSCP) website for more information about social and environmental conduct.
- Check for information on CSR labels and certification in the Standards Map database.
- Check with the Sustainable Initiative Fruits and Vegetables (SIVAF) about the commitment and development in sustainability of the fresh fruit sector.

Organic niche: Thanks to the increased attention to health and environment, there is also a growing interest in organically produced fruit and vegetables including organic stone fruit.

Tip:

- Read more about organic farming on the Soil Association website.

New varieties and taste: New varieties such as the Paraguayo peach are gaining in popularity. Stone fruit need to be at the optimal ripeness when bought and consumers have a preference for sweet varieties. Taste and consumer experience have become important in the purchase of fresh fruit.

Tips:

- Make sure that supply chain logistics and transport processes do not affect product taste in any significant way.
- Find the right varieties that are most favoured on your destination market.

More attention to local seasons: European countries are large producers of fresh stone fruits themselves. There is increased attention to the specific seasons of fruit, which is often promoted by local retailers and given extra value. Locally cultivated stone fruit also fits well in the growing demand of sustainable fruit. While consumer awareness of local seasons increases, the opportunities for developing countries are often limited to the off-season and supplementing the EU production.

Tips:

- In order to compete with the EU production, maintain high quality standards and supply a superior product. Uniformity in size and quality is important.
- Increase cooperation between export and production in order to meet EU buyer requirements and increase your chances on the European market.

4 . What requirements should fresh stone fruit comply with 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, which are those most of your competitors have already implemented; in other words, the ones that you need to comply with in order to keep up with the market, and (3) niche market requirements for specific segments.

For general information, see also the Buyer requirements for fresh fruit and vegetables on the *CBI Market Intelligence Platform for fresh fruit and vegetables*.

Requirements that you must meet

Pesticides

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers. To avoid health and environmental damage, the EU has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed will be withdrawn from the EU market. Note that buyers in several Member States such as the UK, Germany, the Netherlands and Austria use MRLs which are stricter than the MRLs laid down in EU legislation.

Tips:

- To find out the MRLs that are relevant to stone fruit, use the EU MRL database in which all harmonised MRLs can be found. You can search for your product or the pesticide used and the database shows the list of the MRLs associated to your product or pesticide. Read more about MRLs in the EU Export Helpdesk.
- 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.
- Check with your buyers whether they have additional requirements on MRLs and pesticide use.

Phytosanitary requirements

Fruit and vegetables exported to the EU must comply with the EU legislation on plant health. The EU has laid down phytosanitary requirements to prevent the introduction and spread of organisms harmful to plants and plant products in the EU. The requirements mainly imply that:

- Certain listed organisms are not allowed to be imported into the EU, unless specific circumstances apply. EU control measures are subject to change;
- Plants or plant products specified in Part B, Annex V of the Plant Health Directive 2000/29/EC must be accompanied by a plant health certificate. A model phytosanitary certificate can be found through Annex VII of the Plant Health Directive.

Tips:

- Check with the relevant National Plant Protection Organisation (NPPO) or your EU importer what the requirements are for your product. Use the list of NPPOs.
- Read more about plant health in the EU Export Helpdesk.

Contaminants

Contaminants are substances that have not been intentionally added to food, but which may be present as a result of the various stages of its production, packaging, transport or warehousing. To avoid negative impact on the quality of food and risks to human health, the EU has set limits for several contaminants.

Tips:

- Find the relevant contaminant levels in the Annex of Regulation (EC) 1881/2006. All contaminants are presented and maximum levels are provided per product or groups of products.
- Find out more about prevention and reduction of lead contamination in the Code of Practice published by the Codex Alimentarius.
- Check the European Commission's fact sheet on food contaminants "Managing food contaminants: how the EU ensures that our food is safe" and read more about contaminants on the EU Export Helpdesk.

Control of food imported to the EU

To ensure food safety and avoid environmental damage, the EU has restricted the use of certain chemicals in several Regulations and Directives. Your products will be subjected to official controls. These controls are carried out to ensure that all foods marketed in the EU market are safe; i.e. in compliance with the requirements applicable to them. There are three types of checks:

a) Documentary checks

b) Identity checks
c) Physical checks

In the event of repeated non-compliance of specific products originating from particular countries, the EU can decide that controls will be carried out on an increased level or lay down emergency measures. Controls can be carried out at all stages of import and marketing in the EU. However, most checks are done at the points of entry in the EU.

Switzerland, Norway, Iceland and Liechtenstein are not EU members, but they are part of the European Free Trade Association (EFTA). Their food laws are to a large extent identical with EU legislation. However, some aspects of legislation may differ. In Switzerland, import checks are the responsibility of the Swiss Customs Administration and the Federal Office of Public Health.

Tips:

- Familiarise yourself with the procedures before planning your exports to Europe. Failure to follow the right procedures could cause a decrease and delay of orders, increase costs and result in actions by enforcement authorities.
- Make sure that the accompanying documents correspond (from A to Z) with the food products contained in the consignment.
- Read more about health control on the EU Export Helpdesk.
- Consult the EU Export Helpdesk for a full list of requirements for stone fruit, selecting the product code 0809.

Common buyer requirements

Certification as guarantee

As food safety is a top priority in all EU food sectors, you can expect most buyers to request extra guarantees from you in the form of certification. GlobalG.A.P. is[P1] the most commonly requested food safety certification scheme, essential for exporting stone fruit to Europe, especially in northern Europe and via supermarkets. GLOBALG.A.P is 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).

Examples of other food safety management systems that can be required are British Retail Consortium (BRC) and International Food Standard (IFS), FSSC22000 or SQF. These management systems are supplemental to GLOBALG.A.P. and are recognised by the Global Food Safety Initiative (GFSI).

Tips:

- Check which food safety management systems are most commonly requested in your target market. Expect GLOBALG.A.P. to be one of them.
- Read more on the different food safety management systems at the Standards Map.
- As food safety is a major issue; work proactively with buyers to improve food safety and be

transparent and up-to-date with buyer requirements and regulations.

Quality standards

The General EU Marketing Standards also apply to stone fruit. EU buyers often require compliance with the standards of the UNECE or the Codex Alimentarius Commission (CAC). It should be noted that quality refers to both food safety and food quality.

Tips:

- Make sure that you supply the quality as agreed in the product specifications and discuss with your buyer which additional certificates are required. These requirements vary between countries and market segments.
- Pay attention to an effective post-harvest chain, including cold storage. Try to avoid damaging of the product in any way, as any damage will increase the change of infection and deterioration of the produce.

Niche markets: Organic and Fairtrade requirements

Organic, a growing niche market

An increasing number of EU consumers prefer food products that are produced and processed by natural methods. The market for organic stone fruit is increasing along with the general trend of organic fruit. In order to market organic products in the EU, you have to use organic production methods according to EU legislation. Furthermore, you have to use these production methods for at least two years before you can market the fruits and vegetables as organic.

You (or your EU importer) must apply for an import authorisation from EU organic control bodies. After being audited by an accredited certifier, you may put the EU organic logo on your products as well as the logo of the standard holder such as Soil Association (especially relevant in the UK), Naturland (Germany) or Bio Suisse (Switzerland). Some of these standards are slightly different, but they all comply with the EU 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 the different Organic certifications.
- For the export of organic stone fruit to the European market, use a competent and specialised importer who understands the market and knows the way into niche markets with their particular requirements.

Fair and sustainable

A small but growing niche market is the market for fresh products produced with more attention to the social and/or environmental conditions in the producing areas. For stone fruit social compliance is important, although product quality has top priority.

Examples of social or sustainable labels for fresh fruit and vegetables are Fairtrade and Fair for Life.

Furthermore, importers may adopt initiatives which may also impact you as a supplier; for example, participating in a retailer initiative such as the Ethical Trading Initiative (ETI) in the UK or the Business Social Compliance Initiative (BSCI) in mainland Europe.

The IDH Sustainable Trade Initiative has a Fresh and Ingredients programme with the aim to increase imports of sustainably produced crops with 25% by 2020 (against the 2016 baseline).

Tips:

- Check your company's current performances; for example, by doing a self-assessment on the BSCI website.
- Consult the Standards Map database for more information and for differences between Fairtrade labels.

5 . What competition do I face on the European stone fruit market?

For general information about market competitiveness for fresh fruit and vegetables, you can have a look at the Market Competitiveness information available at the CBI market intelligence platform. The platform also provides Tips for doing business with European buyers.

This section provides information about the market competitiveness of the EU market for stone fruit.

Company competition: Rivalry in the trade of stone fruit is fierce most of the time. In summer time, competition against European production makes trade from other countries extremely difficult. Europe production is favoured because of less transport and therefore more freshness. However, new varieties can help to be successful on the European market.

Changing weather conditions influence European production. Fresh stone fruit is fragile and can suffer from severe impact of climate conditions. Apricots and cherries cannot easily withstand early warm periods and colder periods at the end of the season. Changing climate conditions in Europe will thus have a positive impact on the competitive position of exporting developing countries.

Market entry: Certification and meeting both legal and non-legal requirements form a major hurdle for producers and exporters wishing to enter the European market. Suppliers of fresh fruit and vegetables to European retailers are not in a position to argue about the rules of the game. In general, European producers are very well prepared to supply the European market, giving them an advantage over new suppliers from developing countries.

Product competition: In the last decade, the diversity of fruit and vegetables supplied to the European market increased. Substitutes for fresh stone fruits are widely available. Peaches can be substituted with nectarines, and cherries with strawberries. Especially European production of fresh stone fruit varieties competes with strawberries and other fresh stone fruit varieties. Exporters from developing countries in winter time encounter fewer problems with substitutes. Stone fruits in general are less available then.

Tips:

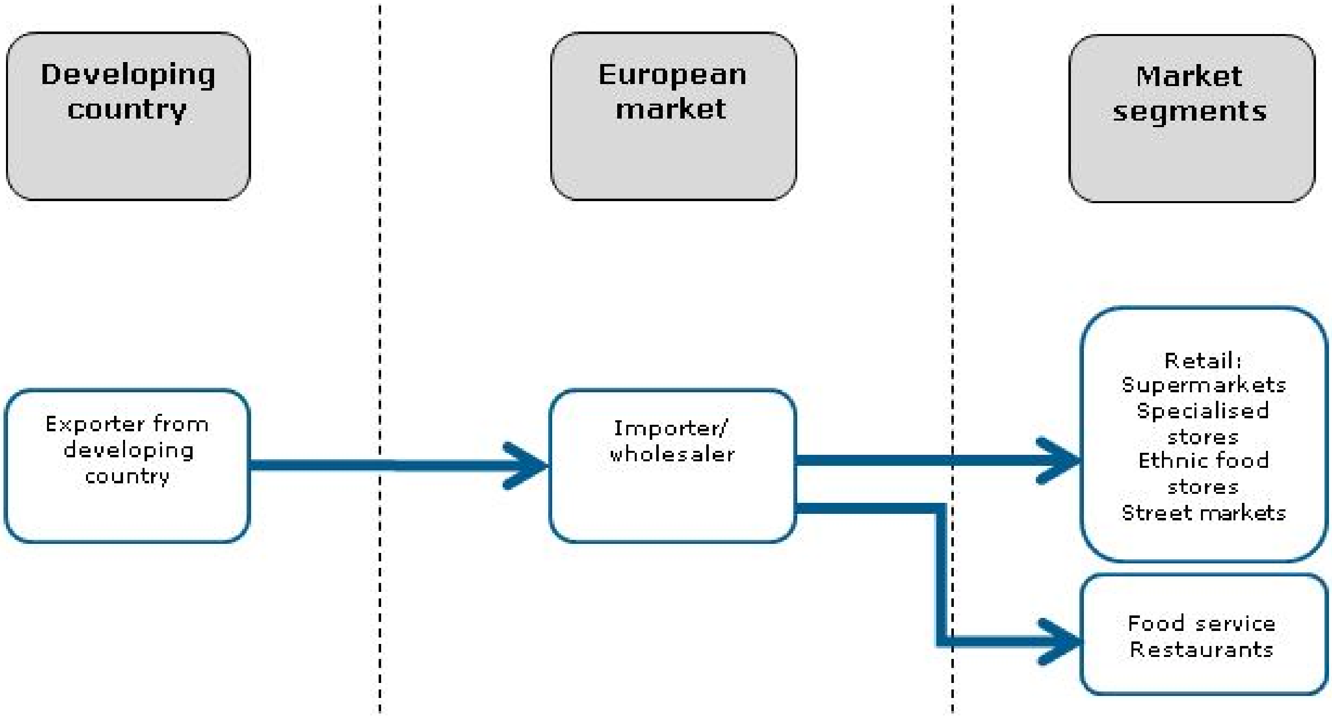
- Become part of a long term retail programme and improve your company's performance by building relationships with experienced buyers.
- Do not compete on price alone, but build partnerships with buyers and strive for excellent product quality and handling.
- Look for opportunities in the European off-season or in supplying new varieties. Specialists in novelties can have a stronger position for negotiation than suppliers of regular stone fruit.
- Establish a credible track record, including 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.
- Use storytelling (for example, show the product's origin and producer), novel packaging and premium quality as methods for distinguishing your product.

6 . What do the trade channels and interesting market segments look like in Europe for fresh stone fruit?

For more general information about market channels and segments, you can have a look at the Market Channels and Segments available at the CBI market intelligence platform.

This section provides information about the various marketing channels through which fresh stone fruits are marketed in Europe.

Figure 8: Market channels for fresh fruits and vegetables on the European market



Interpretations and opportunities

Counter-seasonal import concentrated in the Netherlands: Fresh stone fruits are mainly imported in winter time, i.e. counter-seasonal, by wholesalers who supply to large supermarkets and food service specialists in Europe. The main importers can be found in the Netherlands. From there, fresh stone fruits are supplied all over Europe.

Regional differences in market channels: In Europe, there are regional differences in the composition of market channels. Northern countries such as Germany, the UK, the Netherlands and Belgium have a very dominant retail channel (supermarkets). France and Spain go even further with large hypermarkets, alongside smaller specialist shops. Countries in the Alpine region (such as Switzerland and Austria) are more favourably disposed towards small local shops.

Supermarkets are demanding: Supermarkets demand standardised packaging and have special criteria for size and quality. Supermarkets are also focusing the most on MRLs.

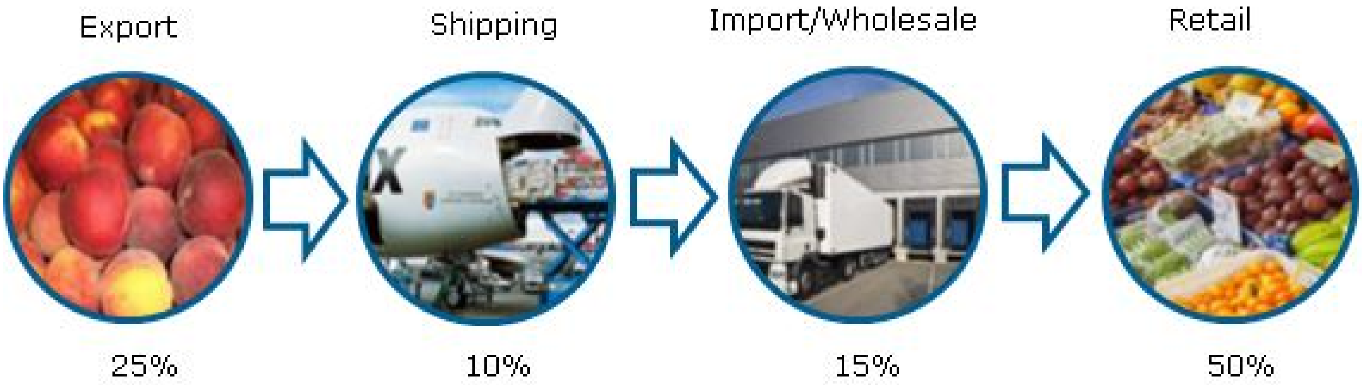
Tips:

- Establish integrated producer cooperatives with enough assistance to farmers and checks on production methods, post-harvest handling and storage to keep quality up to standards. Quality and uniformity are crucial when supplying to supermarkets.
- Find a European importer by presenting yourself at trade fairs such as [Fruit Logistica](). All of the different channels start with a strong relationship with a European partner.
- Find out whether your company is ready to supply to large retail chains. Check the [ITC Standards map]() for certifications and self-assessment tools.

7 . What are the end-market prices for fresh stone fruits?

The figure below gives an estimation of the price breakdown. This breakdown indicates value-added and gross margins in the different parts of the supply chain.

Figure 9: Price breakdown in the fresh stone fruits supply chain



Consumer prices for stone fruit depend on weather conditions, volumes supplied, season, type of shipment, quality, country of origin and type of retail outlet. Transport costs may vary depending on the type of shipment (air or sea) and inland transport.

Temporary shortfalls in supply (e.g. through harvest problems) have a huge impact on prices. During higher seasonal supply, retailers often put their stone fruit on offer with 20–50% discounts.

Table 3 below provides information about the consumer prices of apricots, cherries and peaches on the European market (without discounts). Be aware that these figures are merely indications.

Table 3: Consumer prices of apricots, cherries and peaches on the European market

Price (€)	2014–2016 (June–August)
	Supermarket prices in the Netherlands and the UK (examples)
Apricots	€6.00–€7.50 p/kg
Cherries	€5.00–€10.00 p/kg
Peaches and nectarines	€2.50–€6.00 p/kg €0.25–€0.85 p/pc +30% for organic
Plums	€2.50–€7.50 p/kg +20/25% for organic

Tips:

- Find information about consumer prices on the online shops of supermarket chains such as Tesco, Albert Heijn or Carrefour. Be aware that much of the retail trade is planned in supply programmes and pricing is not linked to trading prices.

Useful sources

Export and market entry support:

- CBI - http://www.cbi.eu/
- CBI market studies on fresh fruit and vegetables - http://www.cbi.eu/marketintel_platform/fresh-fruit-vegetables/136122/buyerrequirements
- EU Export Helpdesk - http://exporthelp.europa.eu/thdapp/index_en.html
- SIPPO - http://www.switzerland-ge.com/global/export/en/sippo-services
- ITC - International Trade Centre of WTO and UN - http://www.intracen.org/

Certification schemes:

- British Retail Consortium (BRC) - http://www.brcglobalstandards.com/
- BSCI - http://www.bsci-intl.org/
- FAIRTRADE - http://www.fairtrade.net/
- GLOBALG.A.P. - http://www.globalgap.org/uk_en/
- ISEAL Alliance- http://www.isealalliance.org/
- ITC Standards Map - http://www.standardsmap.org/
- Rainforest Alliance - http://www.rainforest-alliance.org/

Marketing and trade standards:

- Codex Alimentarius - http://www.codexalimentarius.org/codex-home/en/
- European Food legislation - http://ec.europa.eu/agriculture/organic/eu-policy/legislation_en
- The United Nations Economic Commission for Europe -http://www.unece.org/

Statistics:

- Agricultural Research for Development - http://www.cirad.fr/en
- Fruitrop - http://www.fruitrop.com (publication of CIRAD)
- Freshfel - http://www.freshfel.org
- Freshplaza - http://www.freshplaza.com
- European Statistics Eurostat - http://ec.europa.eu/eurostat
- FAOSTAT - http://faostat.fao.org/
- ITC Trade Map - http://www.trademap.org/
- United Nations Comtrade - http://comtrade.un.org/