



[Exporting fresh beans, peas and other leguminous vegetables to Europe](#)

Europe imported around 30 thousand tonnes of fresh peas in 2017, which were mainly sugar snaps and snow peas (mangetout) from developing countries. The market for sugar snaps and snow peas is competitive and much more focused on quality than the common peas and beans, especially in the retail channel. Buyer requirements are becoming stricter each year, especially with regard to pesticide residues and other contaminants. For these specific peas, especially sugar snaps, opportunities for developing countries can be found all year round.

Contents of this page

1. [Product Description](#)
2. [Which European markets offer opportunities for exporters of fresh beans and peas?](#)
3. [What trends offer opportunities on the European market for fresh beans and peas?](#)
4. [What requirements should beans and peas comply with to be allowed on the European market?](#)
5. [What competition do you face in the European market for fresh beans and peas?](#)
6. [Through what channels can you get beans and peas onto the European market?](#)
7. [What are end market prices for beans and peas?](#)

1 . Product Description

The group of leguminous vegetables consists of a wide variety of crops. This product factsheet focuses primarily on the peas or the 'pisum sativum' variety, in particular snow peas and sugar snaps, which are most relevant for the export from developing countries:

- Snow pea (*Pisum sativum* var. *saccharatum*), also known as mangetout
- Sugar snap (*Pisum sativum* var. *macrocarpon*), also known as snap pea

Snow peas and sugar snap peas are used for consumption with the pod.

Table 1: CN commodity codes for peas, beans and other leguminous vegetables

Number	Product
07081000	Fresh or chilled peas 'pisum sativum', shelled or unshelled

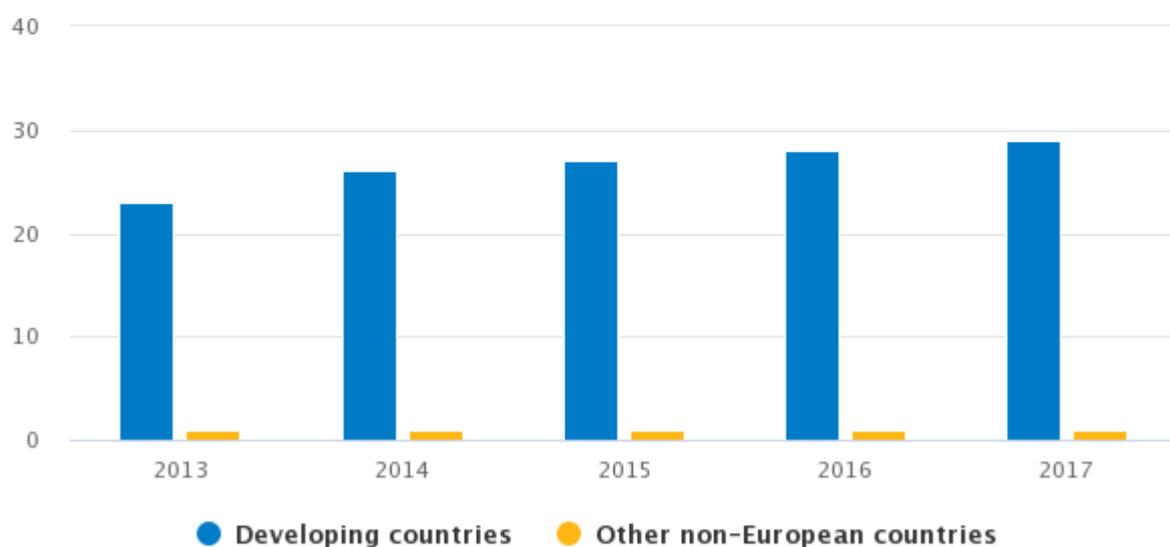
2 . Which European markets offer opportunities for exporters of fresh beans and peas?

Sugar snaps and snow peas are interesting export products for developing countries

European imports of peas have increased since 2013 from 24,000 to 30,000 tonnes in 2017, which is roughly 10% of the total import of leguminous vegetables. Nearly all pea imports from non-European countries came from developing countries. Sugar snaps and snow peas are the most commonly imported leguminous vegetables, mainly from Guatemala, Zimbabwe and Kenya.

Figure 1: European import of fresh peas 'pisum sativum' (including sugar snaps and snow peas)

in 1,000 tonnes



Source: Market Access Database

Tip:

- Use online news sources such as [Fresh Plaza](#) as a starting point for finding current relevant information in the market for fresh fruits and vegetables, including fresh beans and peas.

Growing demand in Scandinavian and Benelux countries

According to industry sources, sugar snaps are in growing demand in Scandinavian countries, the Netherlands and Belgium. In Scandinavia, sugar snaps are also consumed as a snack and holidays, such as Christmas, have the potential to boost consumption.

Sugar snaps and snow peas are considered special vegetables in relation to the common beans and peas produced in and near Europe. As an exporter you can profit from these higher-valued products when considering sustainable production measures and strive for excellent product quality.

The United Kingdom and the Netherlands are the main importers from

developing countries

Although Belgium is the largest importer of beans and peas, the United Kingdom and the Netherlands were the principle importers from developing countries in 2017, especially in off-season periods (from September to June).

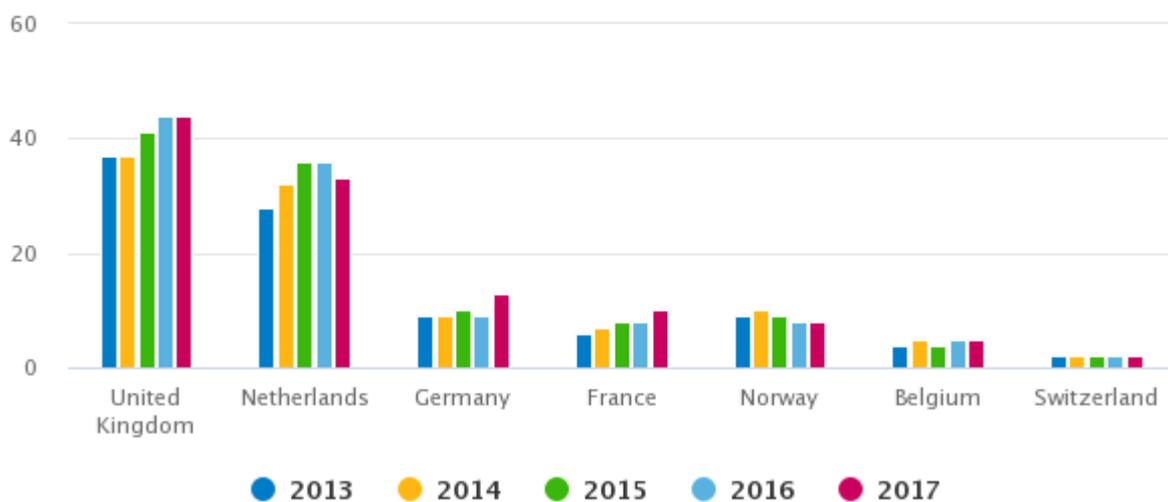
The United Kingdom is an important destination for sugar snaps and snow peas from Guatemala (4.3 thousand tonnes in 2017), Zimbabwe (2.6 thousand tonnes) and Kenya (1.8 thousand tonnes).

The Netherlands is considered to be an important entrance into the European market, importing from such diverse sources as Guatemala (3.1 thousand tonnes in 2017), Zimbabwe (2.5 thousand tonnes), Kenya (1.5 thousand tonnes) and Peru (one thousand tonnes).

Belgium imports a large amount of beans and peas from France and the Netherlands, with a smaller share directly from developing countries. A great deal of this produce is local and destined for the processing (canning and freezing) industry.

Figure 2: Main European importers of fresh peas 'pisum sativum' (including sugar snaps and snow peas) from developing countries

in € million



Source: ITC Trademap

Tips:

- Consider using the established trade routes and find an importing partner in the Netherlands.
- Find a European importer by presenting yourself at trade fairs, for example [Fruit Logistica](#) or [Fruit Attraction](#).

3 . What trends offer opportunities on the European market for fresh beans and peas?

Convenience packaging

Special vegetables such as sugar snaps and snow peas are often packed in small packages. Small

packaging does not only increase the exclusive nature of the product, but it is also more convenient for the consumer and better for maintaining shelf life and product quality. Some packaging is also microwave ready.

Tip:

- Read more about [which trends offer opportunities on the European market for fresh fruit and vegetables](#) on the CBI platform.

Growing interest in sustainable fruit

Environmental and social issues are becoming more and more important in the supply of fresh fruit and vegetables. Certification schemes that are in line with the [Global Social Compliance Program \(GSCP\)](#) will have a higher chance of being accepted by European supermarkets. In the general [trends in fresh fruit and vegetables](#) you will find further insights into different types of certifications.

Tips:

- Consult the [Global Social Compliance Program \(GSCP\)](#) website for more information about social and environmental conduct.
- Additional information on voluntary sustainability and social standards is available on the [ITC Standards Map](#).

Organic niche

The increased attention to health and the environment is also generating increased interest in organically produced fruits and vegetables. The demand for organic beans and peas is growing, as is the case for many other types of fresh vegetables.

Tip:

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

4 . What requirements should beans and peas comply with to be allowed on the European market?

Buyer requirements can be divided into (1) musts (e.g. legal requirements), which must be met in order to enter the market; (2) common requirements (which have been implemented by most competitors), with which you should comply in order to stay abreast of the market; and (3) niche market requirements for specific segments.

The food safety requirements for beans and peas are similar to those for other fresh fruit and vegetables. You can find a complete overview in:

- The general [buyer requirements for fresh fruit and vegetables](#).
- The [Trade Helpdesk](#) that provides an overview of export requirements for beans, peas or leguminous vegetables (code 07081000) per country.

What legal and non-legal requirements must your product comply with?

Minimalise pesticide residues

Pesticide residues constitute a crucial issue for suppliers of fruits and vegetables. With the objective of avoiding health and environmental damage, the European Union (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 market.

Note that buyers in several member states (including the United Kingdom, Germany, the Netherlands and Austria) use MRLs that are stricter than those specified in EU legislation.

Tips:

- To identify the MRLs that are relevant for beans and peas, consult the EU [MRL database](#), which contains all harmonised MRLs. The database is searchable according to product or pesticide used, and it provides lists of the MRLs associated with specific products and pesticides.
- 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.
- Ask your buyers whether they have any additional requirements concerning MRLs and pesticide use.

Complying with phytosanitary requirements

Fruit and vegetables exported to the European Union must comply with EU legislation on plant health. The European Commission has laid down [phytosanitary requirements](#) to prevent 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.

Tips:

- Verify with the [National Plant Protection Organisation](#) or food safety authority in your country if and under which condition you can export beans and peas to Europe. These authorities normally work with international standards, but always check with your buyer as well.
- Read more about [plant health in the EU Trade Helpdesk](#).

What additional requirements do buyers often have?

GLOBALG.A.P. and other certifications as guarantee

Since 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. The most commonly requested certification

is [GlobalG.A.P.](#) 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).

The need for GLOBALG.A.P. depends on the destination country, market condition and market channel, but for most supermarket chains it has become practically a standard requirement.

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

- [BRC](#) (British Retail Consortium)
- [IFS](#) (International Food Standard)
- [FSSC22000](#) (Food Safety System Certification)
- [SQF](#) (Safe Quality Food Programme)

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

Tips:

- Identify the food-safety management systems that 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 in the [Standards Map](#).
- Be aware that food safety is a major issue. Work proactively with buyers to improve food safety, and make sure to be transparent and current with regard to buyer requirements and regulations.

Europe requires high quality produce

European buyers are especially strict with regard to pesticide residues and other contamination. Post-harvest processes, cooling and storage temperatures are also very important. For example, chilling injuries may occur, and misting or exposure to water or ice can also leave brown spots.

Internationally agreed requirements regarding the quality and packaging of peas has been established in the [UNECE Standard for peas](#) (including mange-touts and sugar snap peas).

The UNECE standard for peas can be taken as a guideline for minimum quality. This standard applies to shelling peas (round peas, wrinkled peas) intended for consumption without the pod, as well as to mangetout or snow peas and sugar snap peas intended for consumption with the pod.

The pods or seeds must be:

- fresh;
- intact; however mange-tout peas and sugar snap peas may have their ends removed;
- sound; produce affected by rotting or deterioration are deemed unfit for consumption and is excluded;
- clean, practically free of any visible foreign matter (including parts of the flowers);
- free of hard filaments or films;
- practically free of pests;
- practically free of damage caused by pests;
- free of abnormal external moisture;
- free of any foreign smell and/or taste;
- seeds must be normally developed in shelling peas.

The development and condition of the peas must be such as to enable them:

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

Peas are divided into two classes: Class I and Class II. Class II applies to peas that are slightly more developed (making the pods more fibrous) or that have some slight defect (e.g. in shape, colouring or skin).

Tip:

- See the [CBI Market Intelligence Platform](#) for general information on quality standards. For specific requirements, always contact your buyer.

Size and packaging

Packaging size may differ according to the customer's request. Sugar snaps and mange-touts come in boxes of 2, 3, 4 or 5 kg. Nevertheless, a wide variety of containers and sizes are used in the market.

Common retail packaging in supermarkets includes flow packs, trays and plastic wrappers, and plastic punnets of 125 and 300gr, although other weights are used as well.

Tip:

- See also the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits and Vegetables \(CAC/RCP 44-1995\)](#).

Labelling

Labels should include provide the following information:

- the name under which the product is sold;
- the product's commercial identification: class, size (code), number of units, net weight;
- the name and address of the producer;
- the place/country of origin;
- traceability code (for example [Global Location Number](#));
- Officially recognised code mark such as a GlobalGap Number (GGN) (recommendable).

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

The [Regulation \(EU\) No 1169/2011](#) establishes the general principles, requirements and responsibilities governing food information, particularly with regard to food labelling. It specifies methods for guaranteeing the right of consumers to access information and procedures for the provision of food information, taking into account the need to provide sufficient flexibility to respond to future developments and new information requirements.

Social and environmental compliance

There is growing attention in Europe for the social and environmental conditions in producing areas. Most European buyers have a social code of conduct which they expect suppliers to adhere to. Although product quality has top priority, social compliance is important and becoming a requirement for many buyers in Western Europe.

It can be a plus to be [GRASP](#) certified. GRASP is part of GLOBALG.A.P. With regard to social certification, it is one of the most accessible schemes and gaining in importance.

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:

- Examine your company's current performance, for example by completing a self-assessment on the [amfori/BSCI website](#).
- 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.

What are the requirements for niche markets?

Organic: A growing market

Consumers in Europe increasingly express their preference for food products that have been produced and processed by natural methods. The demand for organic beans and peas is growing. In order to market organic products in Europe, you must use organic production methods as specified in [European legislation](#). Furthermore, you must have used these production methods for at least two years before you will be allowed to market the fruits and vegetables as organic.

In addition, you (or your importer) must apply for import authorisation from organic control bodies. After being audited by an accredited certifier, you will be entitled to use the European Union organic logo on your products, along with the logo of the standard holder, for example [Soil Association](#) (especially relevant in the UK), [Naturland](#) (Germany) or [BioSuisse](#) (Switzerland). Regardless of several minor differences, all of these standards comply with the European Union legislation on organic production and labelling.

Tips:

- Implementing organic production and becoming certified can be expensive. You should therefore assess the market potential before making any investments.
- Consult the [Standards Map database](#) for the different organic certifications.
- For the export of organic beans and peas into the European market, work with an importer who understands the organic market and is familiar with the specific requirements.

Fair trade

A few specialised buyers offer an extra opportunity for fair-trade certified products. Sugar snaps and snow peas can be very suitable for fair-trade certification because in many cases it is a product of smallholders. For fair beans and peas there is also [Fair-fruit](#), which is an initiative of an integrated supply chain that provides a market for small producers in Guatemala, Peru and Ethiopia.

When you choose to get certified, some of the options you could consider, are:

- [Fair for Life](#)

- [Fairtrade](#)

Tip:

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

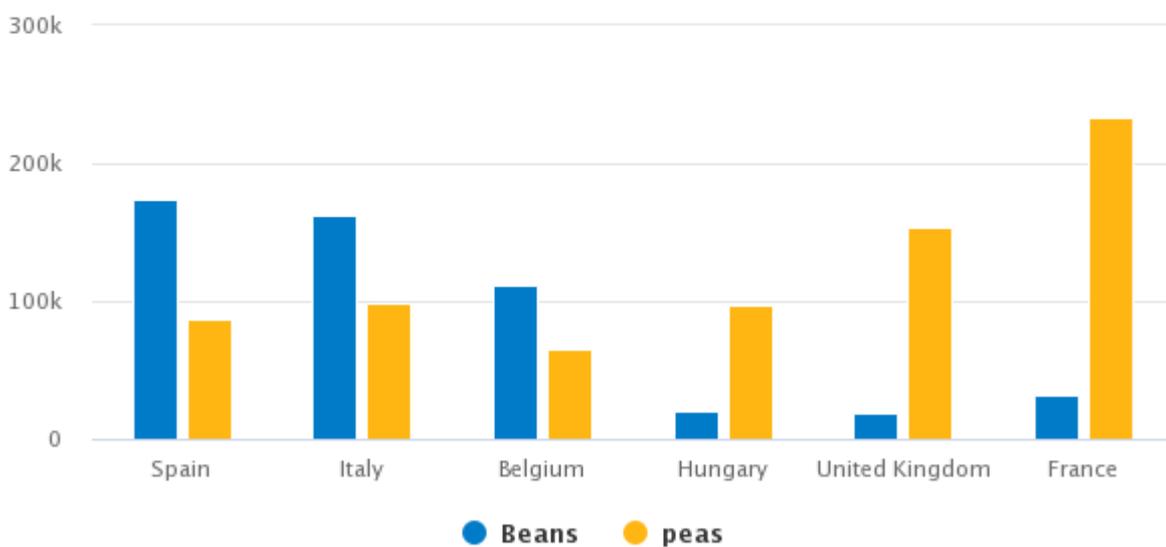
5 . What competition do you face in the European market for fresh beans and peas?

Southern Europe is strong in bean and pea production

Europe is a large producer of fresh beans and peas, offering a wide range of suppliers. Spain, Italy and Belgium are the leading producers of fresh beans in Europe with a production of between 110 and 170 thousand tonnes in 2016. France, the United Kingdom and Hungary produce most of the peas (common peas are eaten without the pod), reaching a volume varying between 90 and 240 thousand tonnes.

Figure 3: European producing countries of beans and peas in 2016

in 1.000 tonnes



Source: FAOSTAT

Tip:

- For additional data on the production and trade of fresh beans and peas, see the Statistics division of the Food and Agriculture Organisation ([FAOSTAT](#))

Year-round supply

Sugar snaps and snow peas are only a small part of the total bean and pea production in Europe

and only available as fresh vegetables between May and September (mainly snow peas). To complement the local production and guarantee a year-round supply of these specific peas, European buyers import products throughout the year. A large part of the cultivation abroad is programmed by the larger supply chains in Europe. Kenya is the only country to supply Europe all year round, with a peak from October to December.

Long distance supply, regularly air freighted, means a higher consumer price. This means you must treat these peas as a more exclusive product and distinguish in quality and packing.

Figure 4: Indicative supply calendar

	jan	feb	mar	apr	may	jun	jul	aug	sep	oct	nov	dec
Kenya												
Guatemala												
Egypt												
Zimbabwe												
Peru												

Tips:

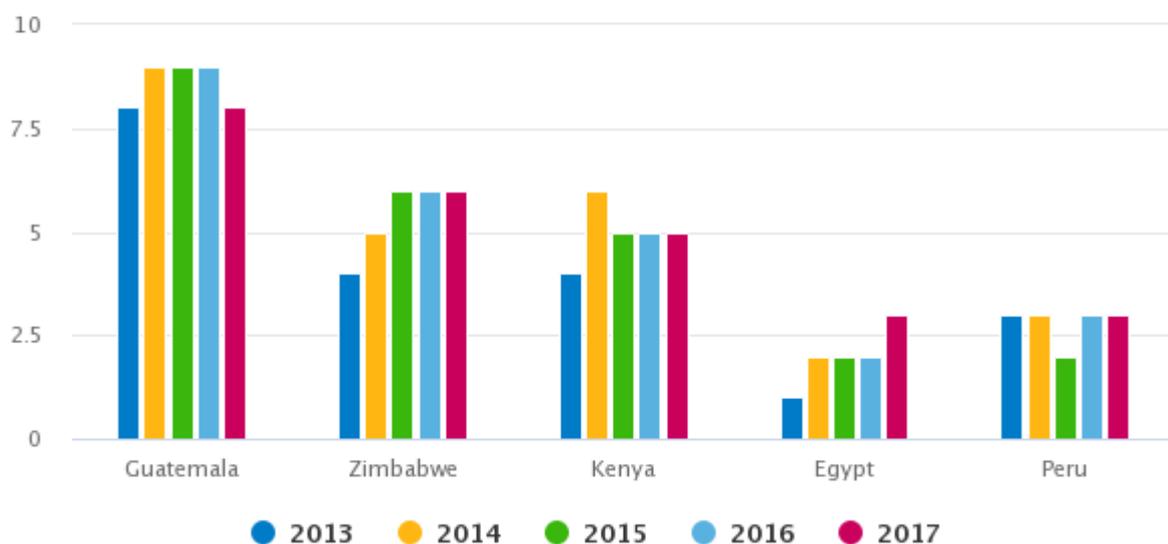
- Organise a professional production base (for example through cooperation, contracts or joint ventures). Importers in the European market favour larger producers, for reasons of supply certainty.
- Do not compete on price alone, instead build partnerships with buyers and strive for excellence in product quality.

Company competition

The market is highly competitive, with many suppliers and a few dominant retail organisations. Suppliers of fresh vegetables to European retailers are in no position to argue about the rules of the game. Buyers will switch to other suppliers if their expectations are not met.

Figure 5: Main suppliers of fresh peas 'pisum sativum'
(including sugar snaps and snow peas)

in 1,000 tonnes



Source: Market Access Database

The leading suppliers to Europe in 2017 were Guatemala, Zimbabwe and Kenya. Egypt is gaining market share competing in the same window as Guatemala, but it is geographically significantly closer to Europe. Egypt has a pea production several times higher than that of Guatemala, exporting other pea varieties in addition to sugar snaps and snow peas.

Tips:

- Check the supply seasons and availability calendars on the websites of European importers to see when and from where they import fresh beans and peas. It provides you with a basic understanding of your competition.
- Being part of a stable partnership and being a trustworthy supplier can help you to establish and maintain your market position. Establish a credible track record of providing transparent information on your company and product quality.
- Read the [tips for doing business with European buyers](#).

Market entry

Certification and compliance with legal and non-legal requirements pose a major obstacle for many companies seeking to enter the European market. Buyer requirements on MRLs and food safety are crucial, in addition to many other requirements on environmental and social issues. The control on beans and peas is strict and can be an obstacle for selling beans and peas to Europe, as can be seen in 2015 in the case of [imports from Kenya](#).

Product competition

The diversity of vegetables in the European market is increasing, while overall consumption is decreasing slightly. Competition with other vegetables appears to be increasing in response to the trend towards diversification in diet.

Tip:

- When exploring frozen supply, use company databases such as [Europages](#) to find out which companies in Europe are active in frozen vegetables.

6 . Through what channels can you get beans and peas onto the European market?

Supermarkets are an important segment for beans and peas

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

Tips:

- Find trade partners at trade fairs such as [Fruit Logistica](#).
- Find the right partner: importers/distributors differ in their relationships to the retail sector. Some are suppliers for private-label products, while others have their own brands or market the brands of specific producers (cooperation). Choose an importer that fits your company best.
- Delivering to supermarkets is very demanding in terms of buyer requirements. Contact an experienced importer or distributor before entering the European market. As an exporter, you must meet precisely all of the requirements of retailers.
- For general information about market channels and segments, consult the [Market Channels and Segments document](#) available at the CBI market intelligence platform.

Opportunities in added value

Many varieties of beans and peas are packed fresh or sometimes sold frozen, which is the case with sugar snaps, for example. For these specific varieties from developing countries, it can be interesting to explore the possibility of combining fresh exports with supplying frozen products.

Tips:

- When exploring frozen supply, use company databases such as [Europages](#) to find out which companies in Europe are active in frozen vegetables.
- For more information on canned and frozen beans and peas in Europe, see the [CBI market information on processed fruit and vegetables](#).

7 . What are end market prices for beans and peas?

Special varieties are valued higher

Consumer prices for beans and peas fluctuate according to variety, quality, availability and segment. Supermarket prices for common green beans are around €4-5 per kilo or less when there is abundant seasonal supply, while sugar snaps and snow peas range between €9-12 per kilo. However, retail prices have no connection to the export trade and wholesale prices.

Tips:

- For consumer prices you can check the online shops or assortments of supermarket chains such as [Tesco](#), [Albert Heijn](#) or [Carrefour](#).
- Given that prices fluctuate during the year, find information about recent prices of the most common varieties of peas on the [FranceAgriMer website](#) and the German [Federal Office for Agriculture and Food](#). Use search terms such as 'pois', 'haricot' and 'mangetout' for peas and beans in French, and 'erbse' and 'bohnen' in German.

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