



## [Exporting dried tropical fruit to Europe](#)

The European market for dried tropical fruit is growing. Consumption of dried tropical fruit is driven by various factors, such as a consumer trend towards healthy snacking and new product applications such as fruit snacks. The Netherlands, the United Kingdom, Germany and growing markets such as Poland and Austria offer you opportunities. New product development and implementation of food safety and social responsibility standards in your company can give you great competitive advantages.

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## 1 . Product description

Dried tropical fruit means ripe fruit which is native to or grown in tropical regions, the climatic zone surrounding the equator, processed by drying either by the sun or other recognised methods of dehydration, with or without added sweetening agents, such as cane sugar, and food additives. Another method is to soak the fruit in syrup before drying, creating a very sweet shelf-stable product. This is widely done for soft fruit, such as papaya and pineapple.

In some production methods, such as for banana chips, the product is not actually dried but fried in hot oil, similar to the production of potato chips. Another aspect of banana chips is that the raw material used is not ripe but green fruit.

Depending of the species and variety, dried tropical fruit can be cut into different shapes. The most common are halves, slices, pieces, spears, chunks and cubes.

The most popular dried tropical fruit in Europe include dried bananas, mangos, pineapples and papayas. However, other types of dried tropical fruit are also becoming popular, such as guavas, carambola or star fruit, durian, rambutan, passion fruit, jackfruit and pitahaya.

Dried tropical fruit is used at home, as a snack or cooking ingredient, out of home in hotels, restaurants and other places, and in the food industry, such as in the bakery and confectionery products, as well as in breakfast cereal mixtures.

This study covers general information regarding the market for dried tropical fruit in Europe, which is of interest to producers in developing countries.

For more specific information, see our study on [desiccated coconut in Europe](#). Please note that dried dates are not included in this report as they are mostly grown in subtropical regions. A specific report on the European market for dates can be found on the CBI website.

This study covers general information regarding the European market for natural dried tropical fruit. Please see table 1 for the specific products and their product codes used for statistical analysis. However, the range of dried tropical fruits is wider than statistical analyses can show, as some statistical codes include many different products besides dried tropical fruit.

Dried fruit preserved by sugar, i.e. candied or crystallised fruit, is not included in the extensive statistical analysis. Dried mangoes and dried pineapples are also excluded, due to the absence of relevant statistical codes. However, all types of dried tropical fruit will be included in the qualitative analyses.

Table 1: Combined Nomenclature codes for dried tropical fruit

Number	Product
08134065	Dried tamarinds, cashew apples, lychees, jackfruit, sapodillo plums, passion fruit, carambola and pitahaya
08134050	Dried papayas
08039090	Dried bananas
08031090	Dried plantains

Picture 1: Dried banana slices



Source: Max Pixel

Picture 2: Dried pineapple



Source: Pixabay

Picture 3: Sugar-infused dried papaya



Source: Flickr

Picture 4: Dried passion fruit



Source: Max Pixel

## Quality

Specific quality standards for dried tropical fruit have not been officially defined by the European Union. The most common standards used are standards published by the United Nations Economic Commission for Europe ([UNECE](#)). However, until now UNECE has only defined specific standards for dried tropical fruit: for mango and for pineapple.

The basic quality requirements for dried tropical fruit are:

- Fruit free from insects, mould, damages and blemishes.
- Moisture content: this varies among the different types of dried tropical fruit. Generally, for natural dried fruit without added preservatives or sugars, the moisture content must be lower than for fruit with added preservatives or sugar. For natural dried mangoes, the maximum moisture content is 15% and for pineapples 20%. For dried mangoes treated with preservatives the maximum moisture content is 20% and for treated pineapples 44%.
- Food additives: some types of food additives are allowed in the production of dried tropical fruit. Additives used in production of dried tropical fruit include sodium chloride and calcium chloride to protect from moisture increase, sulphur dioxide to prevent rotting and colour change, and citric acid as antioxidant to prevent colour change. Sugar or fruit juice are also allowed and often used in the production of dried candied tropical fruit infused with sweeteners.
- Quality classification: Although European legislation does not define classification of dried tropical fruit concerning allowed defects, suppliers usually use three classes: Extra, Class I and Class II. This classification determines the percentage of defective products by number or weight.

## Labelling

The label should include the name of the fruit and the word 'dried'. However, in some cases instead of word 'dried', in order to better describe a product, some other description can be used, such as 'dehydrated', 'sun-dried', 'freeze-dried', 'soft', etc.

It is common that specifications on the label include the crop year, style of cut, variety and origin. Best before followed by the date is usually optional for natural dried products, but mandatory for soft fruit, i.e. high-moisture dried tropical fruit.

For retail packs, labels must comply with the European Union Regulation on [the provision of food information to consumers](#). This regulation defines nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information) more clearly. Dried tropical fruit is not included in the regulation's allergen list. However, sulphites must be indicated as potential allergens if they are used as preservatives. Retail packs must be labelled in a language easily understood by the consumer in the European target country, so generally in the country's official language. This explains why European products often carry multiple languages on the label.

In case of bulk packaging for export, the name of the product, lot identification, and the name and address of the manufacturer, packer, distributor and importer must appear on the packaging, as well as storage instructions. The lot number allows consumers to trace the product in the event of any dispute or health risk. It should be written in accordance with to the European Union Regulation on [indications or marks identifying the lot to which a foodstuff belongs](#).

Lot identification, and the name and address of the manufacturer, packer, distributor or importer may also be replaced by an identification mark, provided that such a mark is clearly identifiable with the accompanying documents.

## Packaging

Packaging used for dried tropical fruit must protect the organoleptic and quality characteristics of the product, protect the product from bacteriological and other contamination, including contamination from the packaging material itself, and not pass on any odour, taste, colour or other foreign characteristics to the product.

Dried tropical fruits are usually packaged in plastic bags or plastic liners placed in carton boxes of different sizes. Packed products should be transported on EURO pallets (80 x 120 cm) and further transported in containers. Twenty-foot containers may contain 1,600 cartons of 12.5 kg or 2,000 cartons of 10 kg.

Dried tropical fruit does not require special temperature of transport or storage. However, extremely low or high temperatures should be avoided. At high storage temperatures fruit sugar particles may form on the surface of the product, hardening and discolouring them. Such crystallised fruits may, however, be reconditioned using steam.

### Tips:

- Refer to the [UNECE standards](#) for quality requirements for dried mangoes and dried pineapples
- See our study about [buyer requirements for processed fruit and vegetables](#) for more information about labelling and food contact materials.

## 2 . Which European markets offer opportunities for exporters of dried tropical fruit?

The Netherlands, the United Kingdom and Germany offer you the best opportunities. Besides these three leading markets, opportunities can be found in the growing markets of Central and Eastern Europe.

### Imports

Dried tropical fruit largely re-exported within Europe

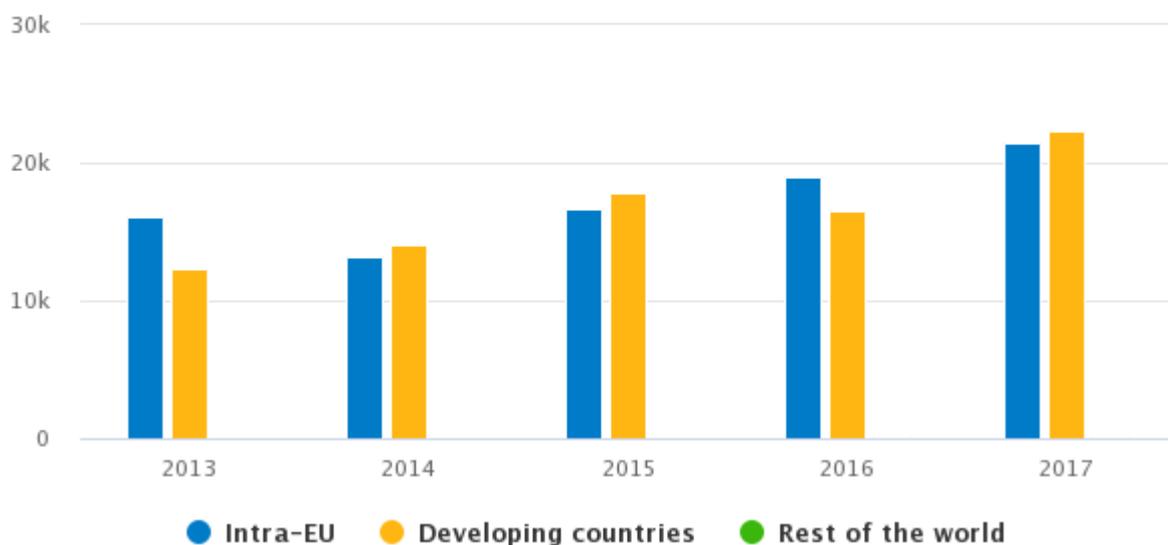
- Between 2013 and 2017, European imports of dried tropical fruit grew in value at an average annual rate of 11%, but decreased in quantity at an average annual rate of 7%. European

imports of dried tropical fruit reached €43 million and 16 thousand tonnes.

- When adding the import of dried mangoes, dried pineapples and other dried tropical fruit that isn't included in the statistical codes, European imports of dried tropical fruit can be roughly estimated at just over 25 thousand tonnes. In addition, European imports of candied tropical fruit are estimated to be just above 5 thousand tonnes.
- Import prices of dried tropical fruit in Europe have slightly increased in the last five years.
- Imports from developing countries are growing fast. In the 2013-2017 period, they grew even faster (+16%) than imports from other European countries.
- A large share of imported dried tropical fruit is re-exported within Europe. After importing the bulk product, dried fruit is often repacked into retail packaging, or the product is simply re-exported in bulk.
- It is expected that imports of tropical dried fruit will continue to increase in the coming years, especially in the segment of naturally dried tropical fruit with no added sugar. This expected increase will be driven by the growing demand for healthy food and particularly by the popularity of healthy snacks, such as dried fruit and nut mixtures, and dried fruit bars.

**Figure 1: European imports of dried tropical fruit, by main origin**

in € thousand



Source: Eurostat

### The Netherlands is the largest importer of dried tropical fruit

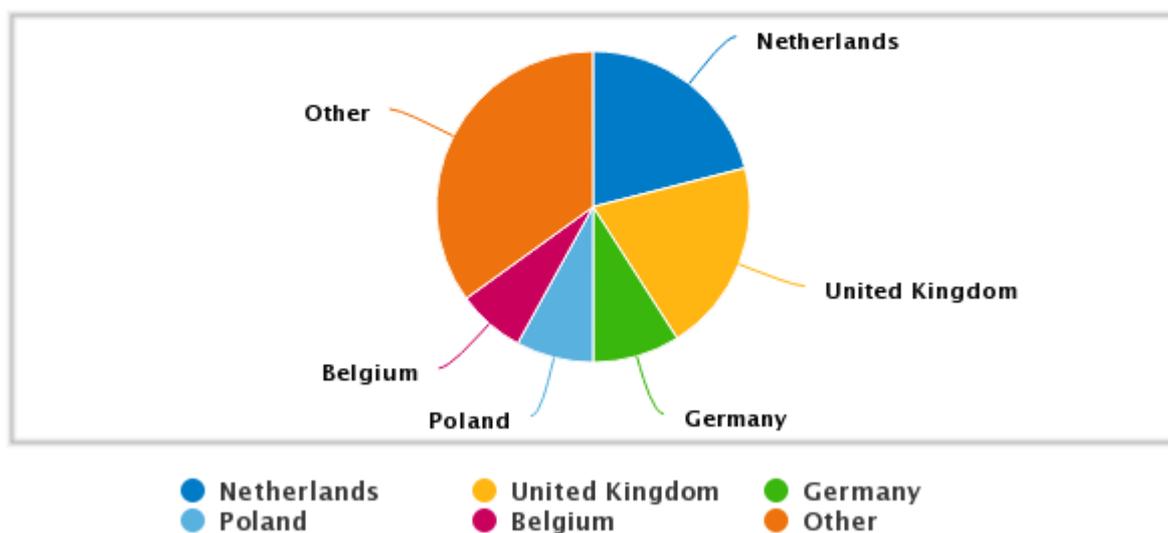
European imports of dried tropical fruit are moderately concentrated by three leading importers. The Netherlands, the United Kingdom and Germany account for approximately half of total imports.

- Dried tropical fruit: Among the largest importing countries, the highest average annual import growth in quantity over the last five years was in Austria (57%), followed by Poland (50%) and Croatia (37%). Poland most significantly increased its European market share of dried tropical fruit mainly through increasing its volume of dried bananas.
- Dried mangoes: The largest European importer of dried mangoes is the United Kingdom with an estimated 1,500 tonnes, followed by Germany (1,000 tonnes).
- Dried bananas: The largest European importer of dried bananas is the Netherlands (1,700 tonnes), followed by Poland (1,500 tonnes). Polish imports increased from only 90 tonnes in 2013 to 1500 tonnes in 2017, which is nearly 17 times more. Most of these dried bananas were imported from Germany and the Netherlands.
- With 1,670 tonnes, the Netherlands is also the largest European importer of dried plantains, followed by Belgium (880 tonnes). As dried bananas and dried plantains are similar products, it

can be concluded that the Netherlands is the largest European importer of bananas and plantains combined (3,400 tonnes).

- Dried papayas: The largest European importers of dried papayas are Italy and Denmark, each accounting for 246 tonnes in 2017.
- Other dried tropical fruit: The largest European importer of other dried tropical fruit, which includes pineapples, lychee, dragon fruit, guava and passion fruit, is the United Kingdom, which imported 2,090 tonnes in 2017, followed by Austria (712 tonnes).
- Candied tropical fruit: The largest European importer of candied tropical fruit is Slovakia (943 tonnes), followed by France (850 tonnes), Italy and the United Kingdom (745 tonnes each). Slovakia significantly increased imports of candied fruit from 100 tonnes in 2012 to 943 tonnes in 2017. In the subcategory of candied fruit with more than 13% sugar, Italy was the largest importer in 2017 (738 tonnes), followed by France and the United Kingdom.

**Figure 2: European imports of tropical dried fruit by country 2017, share of imported volume**  
in %



Source: Eurostat

### Thailand the leading dried tropical fruit supplier in 2017

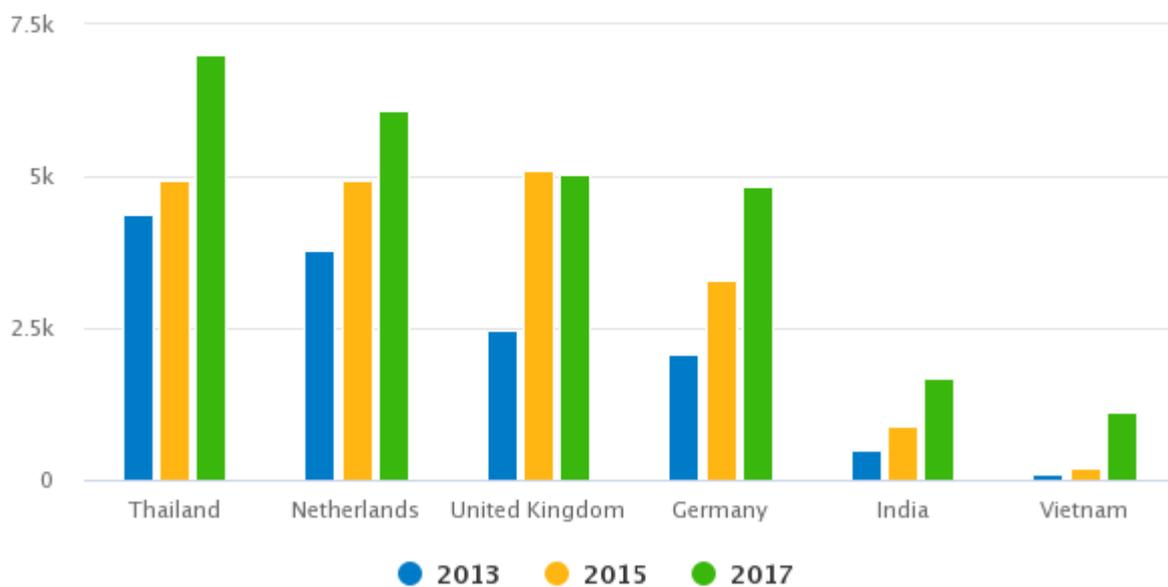
- Dried tropical fruit: Thailand is the leading supplier of dried tropical fruit to Europe, increasing its export from €4.3 million in 2013 to €7 million in 2017. Exports of dried tropical fruit from Thailand are dominated by sweetened dried fruit infused with sugar. Thailand is also the leading supplier of candied tropical fruit to Europe.
- The Netherlands and the United Kingdom are the leading re-exporters of dried tropical fruit imported from other countries. The main target markets for British re-exports of dried tropical fruits within Europe are France and Germany, while the main target markets for Dutch re-exports are Germany and Italy.
- Out of the leading suppliers, those with the most significant export increase of dried tropical fruit to Europe over the last five years were Vietnam (79% annual growth), India (35%) and Sri Lanka (33%).
- Dried mangoes: The leading supplier of dried mangoes to Europe is South Africa with an estimated supply of 2,200 tonnes, followed by Burkina Faso (1,900 tonnes) and Ghana (1,500 tonnes).
- Dried papayas: The leading supplier of dried papayas to Europe is Thailand with a supply of 980 tonnes in 2017, followed by Sri Lanka (22 tonnes) and Ghana (17 tonnes).
- Dried bananas: The leading supplier of dried bananas and plantains to Europe is Ecuador with a supply of 2,220 tonnes, followed by the Philippines (900 tonnes) and Uganda (220 tonnes). The

Philippines gained the most market share in the supply of banana chips, increasing exports to Europe from 190 tonnes in 2013 to 900 tonnes in 2017.

- Other dried tropical fruit: The leading supplier of other dried tropical fruit (mostly sweetened) which includes pineapples, lychee, dragon fruit, guava and passion fruit is Thailand with a supply of 930 tonnes, closely followed by India (901 tonnes) and, at a long distance, Bangladesh (196 tonnes). The largest share of Indian exports of dried tropical fruit consists of dried tamarind.
- Candied tropical fruit: The leading supplier of candied fruit is Thailand with a supply of more than 20 thousand tonnes. Candied fruit from Thailand includes pineapple, papaya, mango, melons, jackfruit, other dried tropical fruits and fruit peels.

**Figure 3: Main suppliers of dried tropical fruit to Europe**

in € thousand



Source: Eurostat

### Tips:

- Consider exporting to countries that are seeing growth in imports, such as Austria, Poland and Croatia, besides aiming to supply major European importing countries such as the Netherlands, the United Kingdom or Germany.
- Learn from developing country exporters gaining share on the European market, such as those from Thailand, India, Vietnam and Sri Lanka. You can find more information at their sector associations, such as the [Thai Food Processors' Association](#), India's [Agricultural & Processed Food Products Export Development Authority](#), [Vietnam's Fruit and Vegetables Association](#), Sri Lanka's [Fruit & Vegetable Producers, Processors and Exporters Association](#), [Subtrop](#), the [South African Subtropical Growers Association](#), and [APROMA-B, the Association of Professionals in the Mango sector](#) in Burkina Faso.
- Identify the biggest importers of your product in selected large and fast-growing markets. Start with an Internet search or read more about supply chains in Europe in our study of [market channels and segments for dried fruit and edible nuts](#). Find examples of importing companies in the [channels and segments chapter of this study](#).

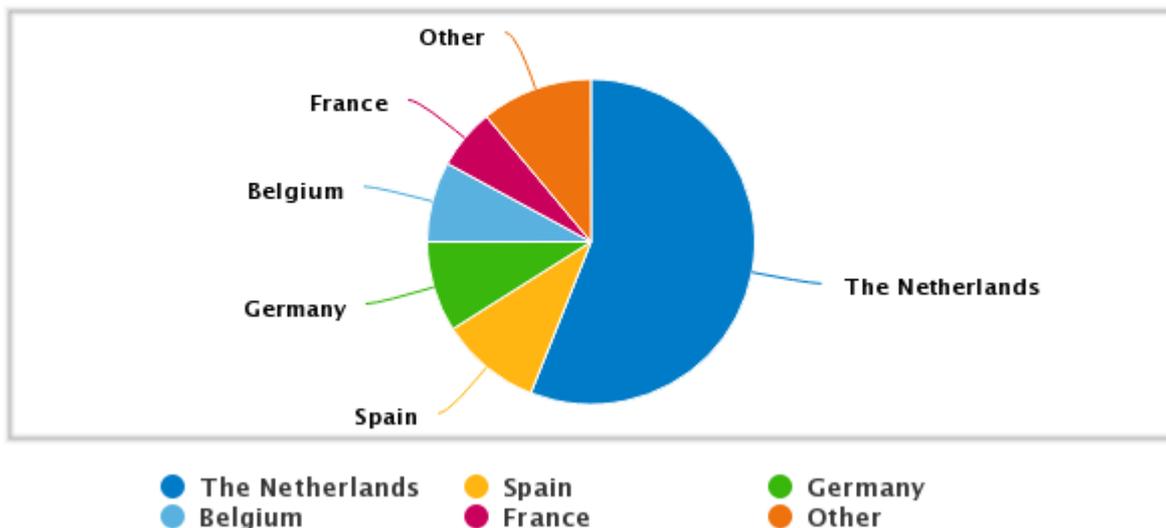
## Exports

The Netherlands is the largest European re-exporter of dried tropical fruit

- Between 2013 and 2017, European re-exports of dried tropical fruits, aside from dried mango, pineapple and candied fruit, grew at an average annual rate of 2%, reaching €17 million and 5 thousand tonnes. Most EU re-exports consist of trade within the EU (89%), while only 11% of dried tropical fruit is exported to countries outside the European Union.
- It is expected that re-exports of dried tropical fruit will continue to increase in the next several years.
- European export of dried tropical fruit is highly concentrated. The Netherlands alone accounts for 56% of total European exports. The main European destinations for Dutch exporters of dried tropical fruit are Germany, France, Spain and the United Kingdom.

Figure 4: European exports of dried tropical fruit by country in 2017, share of exported volume

in %



Source: Eurostat

### Tips:

- Learn from European exporters about destinations which are increasing imports and target those countries directly rather than through re-exports from the Netherlands or other countries. Interesting destinations to explore include Germany, Spain and Belgium.
- You can start by looking up statistics and signing up for a subscription to specialised trade portals such as [IEG Vu](#).
- Learn more about your competitors in our study about [competition in dried fruit and edible nuts](#).

## Production

- Tropical fruit is not grown in Europe, except in very limited quantities in the south of Spain or in isolated territories such as the Spanish Canary Islands or the Portuguese island of Madeira. Therefore, direct production of dried tropical fruit does not exist in continental Europe.

However, there are different types of further processing of imported dried tropical fruit.

- The world's leading processors of dried tropical fruit differ per type of product. Thailand is The leading producer of candied (sugar or juice infused) tropical fruit, especially pineapples and papayas. The leading producer of banana chips is the Philippines, followed by Ecuador. Leading producers of natural and organic dried mango are South Africa, Burkina Faso, Ghana, Mexico and the Philippines. China is increasing its production of dried tropical fruit and is introducing new types of dried tropical fruit to European markets, such as star fruit and durian.
- The most important suppliers of dried mangoes to Europe are South Africa, Burkina Faso and Ghana. South and Central American producers of dried mango are more focused on the United States of America and Canada, and are therefore less present in Europe. The leading mango varieties processed in African countries and exported to Europe are Kent and Keit, followed by Tommy Atkins, Amélie and Brooks.
- The leading producer of banana chips is the Philippines, where Cardava and Cavendish bananas are used for processing by more than 30 processors. Most banana chips are produced in Mindanao, Southern Philippines. The banana is peeled, sliced and then dipped into a sugar and flavouring solution, before being fried in coconut oil. There is also production of unsweetened banana chips.
- The leading producer of sugar infused pineapples, mangoes and papayas is Thailand. Thailand also produces sugar infused guavas, melons, jackfruit, rambutan, longan and other dehydrated fruit. To produce those types of products, fruit is soaked in cane syrup before being cut into slices or dices and dehydrated. Most Thai sweetened dried fruit in Europe is used in the bakery and cereal manufacturing industry.
- Naturally dried pineapples without added sugar are produced in several countries, such as Thailand, South Africa, Ghana, Uganda, Togo, Costa Rica, Bolivia and Colombia.

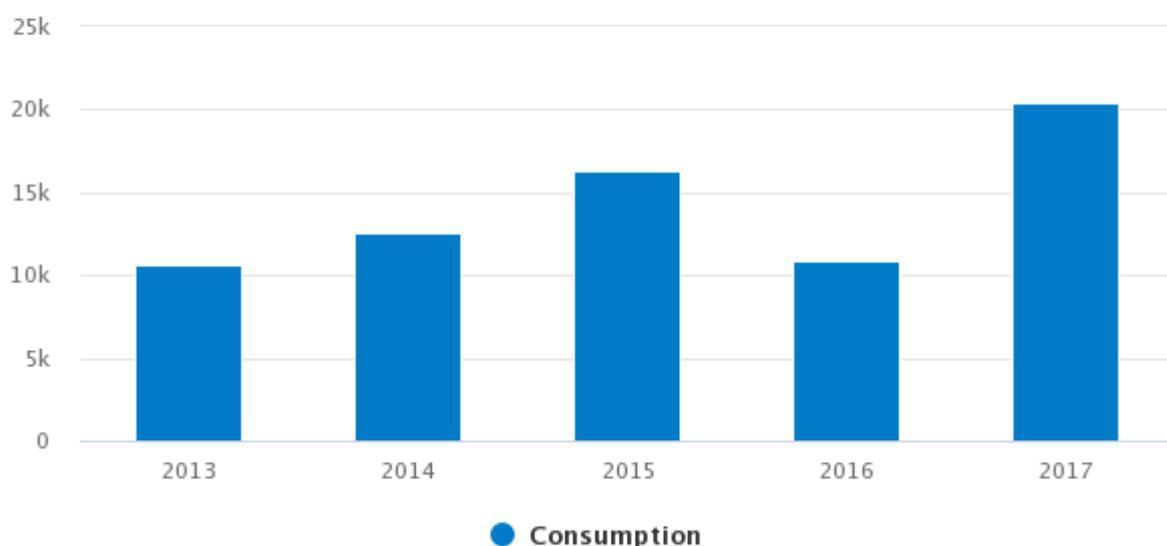
## Consumption

### Consumption of dried tropical fruit is growing

- In the last five years, apparent consumption of dried tropical fruit increased at an annual average rate of 9% in quantity and 18% in value. In 2017, consumption of dried tropical fruit covered by the statistical codes explained in the introductory chapter, reached six thousand tonnes. With the addition of natural dried mangoes and other tropical fruit, total European consumption of dried tropical fruit is estimated at 12-15 thousand tonnes.
- Statistically, consumption of candied fruit increased in value at an average annual rate of 5% in the last five years, but decreased in quantity at an average annual rate of 1%, reaching €5.8 million and 2.2 thousand tonnes in 2017. However, European consumption can actually be estimated at more than 20 thousand tonnes, which almost 10 times more. The reason for such a big difference is that the leading supplier, Thailand, doesn't use the same statistical codes as Europe.
- It is expected that consumption of dried tropical fruit will continue to grow in the next several years. This predicted growth will be driven by a demand for healthy snacks, with new product launches such as fruit bars and different types of breakfast solutions, as well as other applications of dried tropical fruit as an ingredient.

Figure 5: European apparent consumption of dried tropical fruit

in € thousand



Source: Eurostat

Note that the figure above displays the apparent consumption of dried tropical fruit calculated as the difference between external European imports and exports to non-EU destinations. Although there is no production of dried tropical fruit in Europe, it is very likely that some imported dried tropical fruit can be imported and further processed before re-exporting, which means adding value.

### Tips:

- Monitor the consumption of dried fruit in the Statistical Yearbooks published by the [International Nut and Dried Fruit Council](#). Although it is not specifically focused on dried tropical fruit, it provides general consumption patterns and developments in dried fruit markets.
- Be aware of production development in the leading producing countries and do not overestimate European demand. Overproduction can lead to a decrease in prices.

## 3 . Which trends offer opportunities on the European market for dried tropical fruit?

A general overview of the most relevant general market trends for developing country exporters can be found on [CBI Trends for Processed Fruit and Vegetables](#). In addition, there are some specific remarks that can be made about dried tropical fruit.

- Consumption of dried fruit in Europe, including dried tropical fruit, continues to increase as dried tropical fruit is finding applications in new product development. At the latest SIAL trade fair in Paris, several new products with dried tropical fruit were launched. This included [dried fruit bars](#) made of 100% tropical fruit, [freeze dried tropical snacks](#), [freeze dried popsicles](#), [snacks made of dehydrated tropical fruit purees](#) and different types of [other snacks](#).
- [Freeze-drying technology](#) is one of the main influences on the dried fruit market. Although

products are not the same as naturally dried fruit, they offer a different structure and new possibilities for applications. Freeze-dried tropical fruit is used in mueslis, in the production of snacks or even grinded into powders. However, this requires another type of investment into equipment as the starting material is frozen fruit.

- Consumption of sweetened dried fruit is decreasing. A recent survey by IRI International, revealed that two-thirds (70%) of people across Europe are buying healthy food - with less salt, sugar, fat or calories. This is an increase of 41% in just three years.
- Production of fruit bars as snacks is one of the newest European trends, where dried tropical fruit is finding an application as ingredient. They are more frequently produced without added sucrose as a sweetener, but with fructose, stevia, fruit purees or fruit juice as a natural sweetener. Some fruit bars are naturally sweet and do not require any sweeteners. Many ingredient combinations are on the market, such as different types of dried fruit with seeds and nuts.
- Many consumers are now consciously searching for a healthy diet, which is likely to increase the demand for foods like fruit snacks. The health-conscious population demands foods with fewer calories and with an optimal combination of essential nutrients.
- According to [International Trade Centre Report](#) voluntary standards related to sustainable and ethical production are becoming more important. There are more partnerships addressing the major sustainability challenges such as recent example of merger of [Rainforest Alliance and UTZ](#).

### Tips:

- Visit or exhibit on trade fairs in Europe. [Anuga](#) and [SIAL](#) are the best places to monitor market trends and to meet prospects in Europe. They are held every two years, alternately in Cologne, Germany, and Paris.
- Consider producing fruit bars and similar snacks in cooperation with European traders to benefit from the current trend of healthy snacks containing dried tropical fruit.
- Invest in good drying, processing and cutting equipment so you can meet the demands of different buyers. In order to be more competitive, consider investing into cutting equipment which can make different types of cuts according to the needs of European buyers.
- Invest in environmental and corporate social responsibility (CSR) standards such as [BSCI](#), [SMETA](#) and [Fairtrade](#), since these are becoming more and more important in the European markets.

## 4 . What are the requirements for tropical fruit to be allowed on the European market?

In addition to the quality requirements mentioned above, for a general overview of the buyer requirements in the EU please refer to our study on [buyer requirements for processed fruit and vegetables](#). Specifically for dried tropical fruit, consult the [EU Trade Helpdesk](#), where you can select dried tropical fruit under specific codes listed in the Product Description chapter of this report.

For information on commonly requested standards, check the International Trade Centre's [Sustainability Map](#), an online tool which provides comprehensive information on more than 250 voluntary sustainability standards and other similar initiatives covering issues such as food quality and safety.

## Legal requirements

All foods sold in Europe, including dried tropical fruit, must be safe. This applies to imported products as well. Additives must be approved. Harmful residues in pesticides are banned. It should also be readily obvious from the labelling whether a food contains allergens.

In the event of repeated non-compliance concerning specific products originating from particular countries, stricter conditions will be imposed on the importation of the products, such as having to be accompanied with a health certificate and analytical test report.

Products from countries that have shown repeated non-compliance are put on a list in the Annex of [Regulation \(EC\) 669/2009](#). As of December 2018, there is increased monitoring of pesticide residues in dried goji berries from China, sulphites in dried apricots from Turkey and Uzbekistan, and ochratoxin A in dried grapes from Turkey.

The most common problems European importers face when importing tropical dried fruit from developing countries are the following:

- Contamination with pesticide residues;
- Too high or undeclared content of artificial colours, typically Sunset Yellow FCF or tartazine in sugar infused tropical fruit;
- Too high or undeclared content of preservatives such as sulphites or sorbates;
- Specifically for dried papaya, the use of unauthorised genetically modified papaya.

The [European Food Safety Authority](#) (EFSA) frequently changes pesticide residue limits. EFSA regularly reviews the existing maximum residue levels (MRLs) for pesticides. Based on the assessment of the available data, recommendations for changes are regularly published. Therefore it is important to closely monitor those changes and make timely adjustments to your agricultural practices.

## Labelling requirements

[European Union Regulation on food labelling](#) forbids misleading consumers. Claims that a food can prevent, treat or cure a human disease may not be made. Nutritional information is now also mandatory for dried tropical fruit.

Allergens have to be highlighted in the list of ingredients. Requirements regarding information on allergens now also cover non pre-packed foods, including those sold in restaurants and cafés. Although dried tropical fruits are not on the list of the allergens, notification applies for preservatives used in the production. In particular, sulphur dioxide and sulphites at concentrations of more than 10 mg/kg in the total SO<sub>2</sub> must be declared as potential allergens.

## Common and niche requirements

- European importers often request food safety certification. The most common certification schemes accepted in the European market are [IFS](#), [FSSC22000](#) and [BRC](#).
- Environmental protection, organic and fair-trade certification schemes are becoming more and more popular in Europe. For organic production you can consider [IFOAM standards](#).
- The European Union regulates both organic food and drink produced or processed within the EU and organic goods imported from non-EU countries. [Commission Regulation \(EC\) No. 1235/2008](#) details the rules for importing organic products from third countries.

### Tips:

- Refer to the [Codex Alimentarius](#) for the Code of Hygienic Practice for Dried Fruits and for good practices related to production, processing and storage.
- Monitor the latest [MRL updates](#) to find relevant changes in the allowed residues levels for tropical fruit.
- For information on commonly requested standards, check the International Trade Centre's

### [Sustainability Map.](#)

- Ensure that your product is not genetically modified. For this, engage a laboratory accredited for GMO (genetically modified organism) testing and do the testing throughout the whole production process. Examples from dried papaya production show that papaya fields can become infested with GMO by cross-contamination, caused mainly by birds and insects.
- Use the European Union [Rapid Alert System for Food and Feed](#) to learn more about the most common issues in the dried tropical fruit trade and to avoid similar problems.

## 5 . What is the competition like in in the European dried tropical fruit market?

For more information about competition on the European dried fruit and edible nuts market, see our [competition study](#).

### Product competition

The main product competitor for dried tropical fruit is fresh tropical fruit. European consumers have become increasingly health-conscious and prefer a healthy diet with an increased consumption of fresh fruit and vegetables. This trend can influence consumption of dried tropical fruit, especially if it is treated with artificial colouring, or has added sugars or preservatives. Considering such factors, the stiff competition from fresh tropical fruits will likely be a major challenge for the European dried tropical fruit snacks market in the coming years.

### Company competition

Exporters of dried tropical fruit from developing countries should be aware of the main competitors from countries which are well-established producers, as well as from countries that are gaining market share in the European markets. Companies from Thailand, India, Philippines, Bangladesh, South Africa and West African countries are the major competitors in the sector of dried tropical fruit.

Some examples of competitors from producing countries include the following:

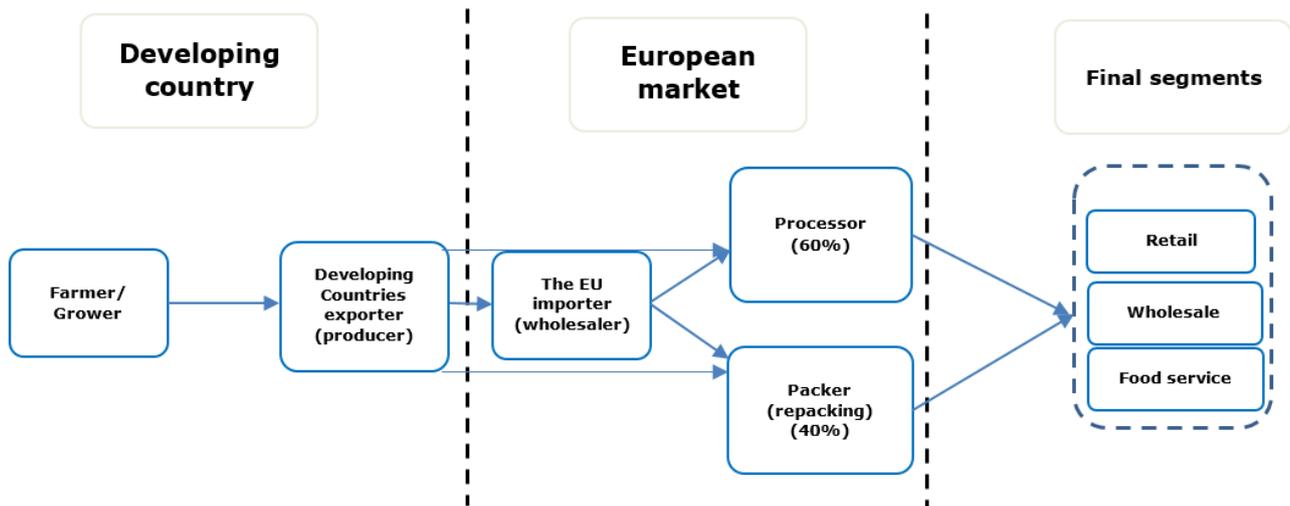
- Thailand: [Unity Food](#), [Phootawan](#), [TanTan](#), [Smile Fruit](#), [Chinwong Food Company](#), [Fruit House](#)
- India: [Sresta](#), [Krishnakath Foods](#), [Jainys Cereals](#), [Saraf Foods](#), and [Yesraj Agro Exports](#).
- Philippines: [Gold Chips](#) (a brand of the company See International), [El Coco Manufacturing](#), LTA Food Manufacturing, [B-G Fruits](#), [Prime Fruits](#), and [Celebes](#).
- South Africa: [Grassroots Group](#), [Cape Dried Fruit Packers](#), [JAB Dried Fruit](#), [Levubu Dried Fruit](#), [Mamusa Marketing](#), [M Pak](#), and [Mohlatsi](#).
- West Africa: [HPW](#), [Gebana Afrique](#), [Mango-So](#), [GIE NAFFA](#), [Fruiteq](#), [Woul Association](#), and [Sanle Sechage](#).

### Tip:

- Consider investing in natural dried tropical fruit production, which entails the production of fruit without the addition of sugars, a growing market segment.

## 6 . Which channels can you use to put dried tropical fruit on the European market?

Chart 1: Common trade channels for dried tropical fruit on the European market



Approximately 60% of the total imported dried tropical fruit in Europe is used as an ingredient for further processing, while some 40% is re-packed and sold by retailers or used in the food service segment. Please note that this share reflects the continued leading role of sweetened tropical fruit used by the industry. However, when it comes to natural dried tropical fruit without added sugar, a much larger share is sold in the retail segment as a snack.

Dried tropical fruit, included sweetened fruit, is used as a snack without further processing except repacking by commercial brands or retail chain private label brands. In the food processing industry, dried tropical fruit has many applications in breakfast cereals, the bakery and confectionery industry, fruit preparations for dairy industry and snack bars.

Company examples for each trade channel for dried tropical fruit in Europe include:

- Importers: [Community Foods](#), [Chelmer Foods](#), [Evolution Foods](#), [Global Grains](#), [Catz International](#), [Nutland](#), [Tradin Organic](#), [Rhumveld Winter & Konijn](#), [Egesun](#), [Besana](#), [Manning Impex](#)
- Agents (also wholesalers): [QFN Trading and Agency](#), [HPM Warenhandelsagentur](#), [Zieler](#)
- Packer (retail): [Whitworths](#), [Forest Feast](#), [Seeberger](#), [Farmer's Snack](#), [Noberasco](#)
- Processor: [Viba](#), [Fulwell Mill](#), [The Food Doctor](#), [Mighty Bee](#), [Bösch Boden Spies](#), [Rude Health](#), [Van Mook](#), [De Vau Ge](#)

### Tip:

- Search for possibilities to deal directly with European processors, which means adding value, since it eliminates connecting traders. However, for many confectionery companies it is not very common to buy directly, as they usually source dried tropical fruit from well-established traders.

## 7 . What are the end-market prices for dried tropical fruit on the European market?

Calculating margins according to final retail prices for dried tropical fruit is not very indicative and will only give a very rough general overview of price developments. However, the CIF price is

estimated to represent approximately 30% of the retail price of a pack of dried tropical fruit. If dried tropical fruit is used as an ingredient, it is even more complicated to estimate the added value, due to the number of different ingredients and the production process.

Prices also very often fluctuate due to harvests which change from year to year, and recently the strong influence of El Niño. In some cases there is also the influence of the materials used in the production process, such as the recent high in the price of coconut oil, which is used in the production process of banana chips.

In 2017, FOB prices for natural dried mangoes ranged between €8 and €10 per kilo, while the price of most sugar-infused dried fruit from Thailand was between US\$3 and US\$5 US\$/kg (€2.6-€4.3/kg).

The most common end-market prices ranges in Europe for selected dried tropical fruit are the following:

- Dried mango: €20-€27/kg — prices of organic dried mangoes are higher;
- Dried pineapples: €15-€20/kg;
- Dried banana (banana chips): €6-€10/kg.

Table 2 below shows an approximate breakdown of the prices:

Table 2: Dried tropical fruit price breakdown

Steps in export process	Type of price	Average share of the retail price
Production of fruit or vegetables	Raw material price (farmers' price)	5-20%
Handling, processing and selling bulk product	FOB or FCA price	20-30%
Shipment	CIF price	35-50%
Import, handling and processing	Wholesale price (value added tax included)	60%
Retail packing, handling and selling	Retail price (for average packaging of 250g)	100%

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