



## [Exporting fresh table grapes to Europe](#)

Table grapes are some of the most traded fruits in Europe and over 500 thousand tonnes is supplied by developing countries. Recent years have shown a change in trade flows and traditional suppliers, which provides opportunities for new producing countries that are investing in quality produce. For exporters, it is important to focus on quality and the right variety, mostly seedless. To ensure your structural presence in Europe, entering into supply contracts is inevitable.

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## 1 . Product description

Commercially, you can make a distinction between wine grapes and table grapes. Table grapes have thinner skin, are usually larger in size and less sweet than wine grapes. In the fresh trade, most grapes are table grapes destined for raw consumption. This fact sheet therefore focuses principally on table grapes.

There are many different table grapes available, varying from white-green to red and dark blue. In Europe, the seedless varieties are most popular for consumption, such as the white-green Thompson and Sweet Globe, and the red Crimson, Flame Seedless and Ruby. There is a wide range of new varieties, complementing or replacing the older existing varieties. The seeded varieties are in decline, but still widely cultivated and available, such as the white-green Italia and the red Globe and Victoria red.

Table 1: Combined Nomenclature (CN) commodity codes

Number	Product
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Source: Eurostat Comext

## 2 . Which European markets offer opportunities for exporters of fresh table grapes?

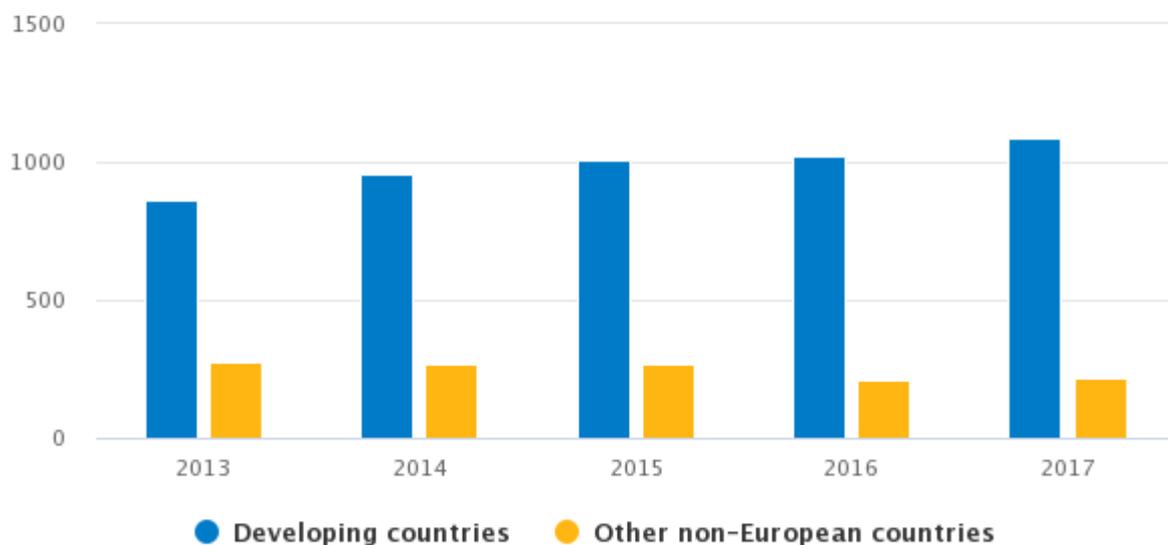
Developing countries are an important supplier of table grapes to Europe

Table grapes are among the ten most popular fruits in Europe. The market for table grapes is mature, with large volumes and a relatively stable demand all year round. This means there are several supply windows throughout the year during which you can step in and meet demand.

Developing countries are an important supplier of table grapes to Europe. In 2017, their supply to Europe reached 546 thousand tonnes after a year-on-year growth since 2013 (426 thousand tonnes). This equals around 24% of European demand. A minor quantity was supplied by other non-European countries, among which were mainly Chile (no longer considered a developing country), the United States and Israel.

Figure 1: Calculated European import value of fresh table grapes 2013–2017

in € million



Source: Trademap

### Tip:

- Stay up to date with the global developments of table grapes by following international news sources such as [Freshplaza](#) and the regular [Overview of the Global Table Grape Market](#).

Germany and the United Kingdom are large consumers of imported table grapes

Germany and the United Kingdom are the main consumer countries for imported table grapes.

Whereas the United Kingdom imports directly from countries such as South Africa and Chile, Germany mainly sources its grapes from Italy and through logistical hubs such as the Netherlands.

As a supplier, it is important that you realise that the largest part of overseas imports concerns seedless table grapes, sold in supermarkets.

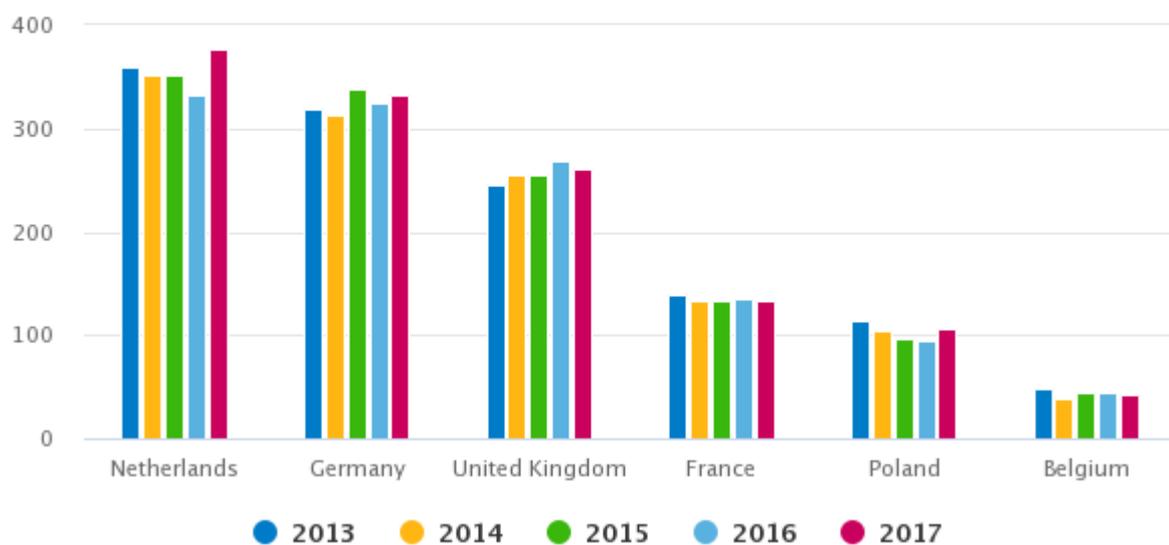
## The Netherlands is an important logistical hub for long-distance table grapes

The Netherlands is the principle entrance for table grapes into Europe. From here, a large volume is re-exported to the rest of Europe. This is especially true for long-distance table grapes from southern Africa, South America and India, but also for grapes from Egypt.

In 2016 and 2017, the Netherlands imported a much greater share of table grapes from India than in the years before, making India its second largest supplier. India profited from a good competitive position compared to the declining imports from other large suppliers. The trend of low-priced Indian table grapes is likely to [continue in the coming years](#).

Figure 2: Main European importers of table grapes 2013–2017

in 1,000 tonnes



Source: Trademap

### Tips:

- Rely on the experience of larger import countries such as the United Kingdom, the Netherlands and Germany if you are a new supplier.
- Visit the [Fruit Logistica](#) in Berlin, the largest trade fair for fresh produce in Europe. All the relevant traders of table grapes will be there.

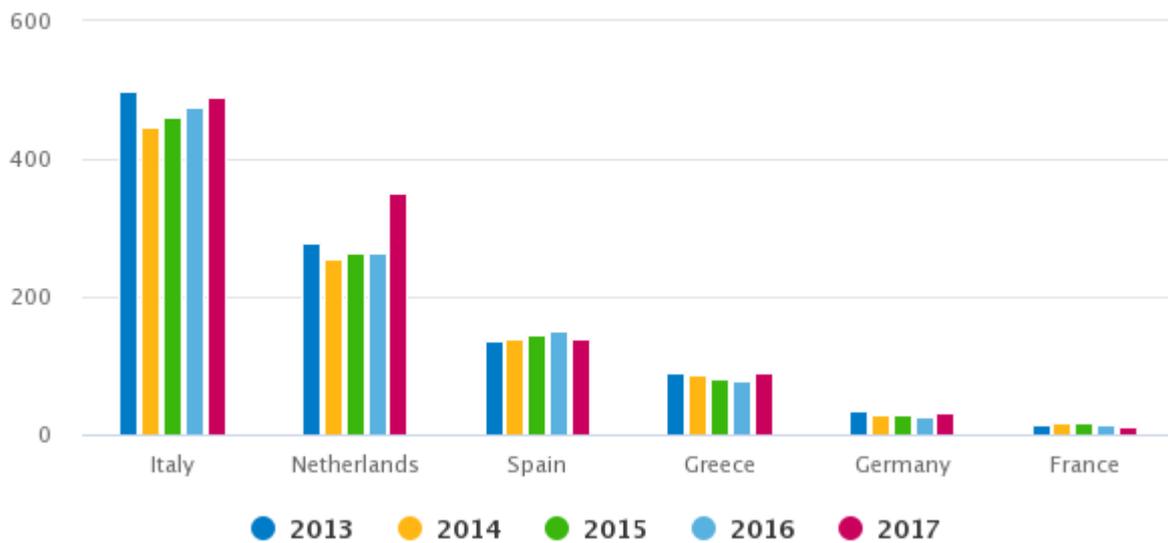
## In Europe, Italy leads the export of table grapes

Italy is by far the largest supplier of table grapes in Europe. Together with Spain and Greece, Italy has a significant production volume of table grapes. These countries produced an estimated [1.7 million tonnes of table grapes](#) in 2016-2017. Import volumes in these countries are therefore relatively small.

However, the production of table grapes is seasonal and has become expensive in Europe. This means your product could be of interest to the large suppliers in producing countries to ensure their continuity in the future.

Figure 3: Main European exporters of table grapes 2013–2017

in 1,000 tonnes



Source: Trademap

#### Tip:

- Explore the European production and suppliers by visiting wholesale markets in Italy (search for “mercato ortofrutticolo”, such as the [Centro Agroalimentare Roma](#) in Rome and the [Verona Mercato](#) in Verona) and Spain ([Mercabarna](#) or [Mercamadrid](#)) or by visiting trade fairs such as the [Fruit attraction trade fair](#) and the [Macfrut fruit and vegetable show](#).

### 3 . Which trends offer opportunities in the European market for fresh table grapes?

#### Convenient, seedless table grapes lead the demand

The European consumer has an increasing preference for convenience. This trend is positive for table grapes, because they are easy to consume and ideal as a fresh snack.

For the same reason, seedless varieties are most appealing to consumers and expected to lead the market demand further. These grapes are typically sold in clamshell packages, but [smaller snack-sized packages](#) are also increasingly available. The convenience trend is strongest in northern Europe.

#### Tip:

- Offer different packaging options to your client and anticipate developments in convenience products. Using attractive packaging will also help distinguish your product.

## Taste is important

Because grapes are often consumed as a snack and as a product of indulgence, you must consider consumer experience as an important success factor for your product. Especially when dealing with experienced buyers, who appreciate premium quality, you can distinguish yourself with superior quality and taste. This means your product has to be fresh, sweet and crisp. Specific preferences can differ per region and buyer.

### Tips:

- Make sure your table grapes are well ripened and well preserved to ensure optimal freshness and taste. Supply chain logistics should not affect the product taste in any significant way.
- Select the grape varieties that best suit your client's market, or find the right buyer for your variety. Visit your export market regularly to update your market knowledge.

## Consumers expect a sustainable product

Supply chains are becoming more transparent and consumers are well informed about environmental and social issues. They expect your product to use a sustainable approach to production and processing. Remember that negative news in your supply chain can put consumers off.

Buyers act on this by requiring transparency and certifications from your company. As a supplier, it is crucial to understand these requirements. 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.

If your certifications are in line with the [Global Social Compliance Programme \(GSCP\)](#) you will have a better chance of being accepted by European supermarkets.

### Tips:

- Check the [Global Social Compliance Programme \(GSCP\)](#) website for more information about social and environmental conduct.
- Read more about [which trends offer opportunities on the European fresh fruit and vegetable market](#) on the CBI market intelligence platform.

## 4 . What requirements must fresh table grapes comply with to be allowed on the European market?

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

Minimise pesticides

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers. The European Union has set [maximum residue levels \(MRLs\)](#) for table grapes. Expect buyers to be extra alert on residue levels, because grapes are consumed directly as a whole.

Northern Europe is an important market for table grapes and supermarkets there tend to be

stricter in residue levels than the European regulation. MRL-free is considered a big plus. This means you have to control your production process very precisely.

### Tips:

- Use the European [MRL database](#) to find out the MRLs that are relevant for table grapes. You can search the database for your product or the pesticide used and find the list of the MRLs associated with your product or pesticide.
- Reduce the amount of pesticides by applying [integrated pest management](#) (IPM) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.
- Read more about the [European legislation on MRLs](#) on the website of the European Commission and always check with your buyers if they have additional requirements on MRLs and pesticide use.

## Quality

You can find the quality requirements for table grapes in:

- the [standard for table grapes of the United Nations Economic Commission for Europe \(UNECE\)](#);
- the [standard for table grapes in the Codex Alimentarius](#).

See also the [UNECE standard presentation](#) for examples.

According to these standards, table grapes must be:

- intact and sound;
- well-formed and normally developed;
- clean, practically free of any visible foreign matter;
- practically free from pests;
- practically free from damage caused by pests;
- free of abnormal external moisture;
- free of any foreign smell and/or taste.

The minimum maturity must be such that the fruit has obtained a [Brix level](#) of 16°. If the Brix level is lower, the sugar/acid ratio must be:

- 20:1 for Brix level 12.5 to 14°;
- 18:1 for Brix level 14 to 16°.

The condition of the products must be such as to enable them:

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

Conformity checks are part of [European regulation \(EC\) No. 1580/2007](#). In the event of non-compliance, your product can be rejected. In certain third countries, local inspection bodies are allowed to carry out pre-export checks.

### Tips:

- Make sure 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.

- Make sure the post-harvest handling, including cooling, is well organised to ensure product quality and shelf life.
- Invest in an uninterrupted cold chain, which is crucial for table grapes.

## Size

Sizes of table grapes can be different per variety. Usually the size is measured in weight per bunch, with a minimum of 75 gram. This does not apply to single-serve packages.

## Packaging

Table grapes, especially the seedless varieties, are most often packaged in plastic punnets, such as clamshells. These punnets are then placed in a cardboard crate. Punnets usually hold up to 500 grams and can be sold to retailers directly. Grapes are sometimes also packed directly in the cardboard box, preferably in a single layer, with added protection of plastic or foam between bunches.

The [UNECE standard for table grapes](#) states that grapes must be packed in such a way as to protect the produce properly:

- The materials used inside the package must be clean and of such a quality that any external or internal damage to the produce is avoided.
- The use of materials, particularly of paper or stamps bearing trade specifications, is allowed, provided the printing or labelling has been done with non-toxic ink or glue.
- Stickers individually affixed to the produce shall be such that, when removed, they neither leave visible traces of glue nor lead to skin defects.
- Packages must be free of all foreign matter, although a fragment of vine shoot no more than 5 cm in length may be left on the stem of the bunch as a form of special presentation.

### Tips:

- Consider packaging to be part of your presentation. Discuss the packaging requirements with your buyer.
- See also the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits and Vegetables \(CAC/RCP 44-1995\)](#).

## Labelling

Food sold in the European market must meet the legislation on food labelling.

The label or marking of each box should at least give the following information:

- Name and physical address of the packer and/or dispatcher
- Product name ('table grapes') and the name of the variety
- Country of origin
- Commercial specifications: class and weight
- Traceability code (for example, the [Global Location Number](#))
- Officially recognised code mark, such as a GLOBALG.A.P. number (GGN) (recommended)

The name and address of the packer or dispatcher can be replaced by an official control mark.

For pre-packages, you must also:

- include the name and the address of a seller established within the European Union with the mention 'Packed for:' or an equivalent mention;
- use a language that is understandable by the consumers of the country of destination.

For organic produce, you must include the European [organic logo](#) and the code number of the control authorities.

### Tips:

- For detailed information on labelling, see the [Codex Alimentarius on food labelling](#) and the [European regulation \(EU\) No 1169/2011 on the provision of food information to consumers](#).
- Consult the [EU Trade Helpdesk](#) for a full list of requirements for fresh fruit, including table grapes, selecting the product code: 08061010.

## 5 . Which additional requirements do buyers often have?

### Certification as guarantee

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

The most commonly requested certification for table grapes is [GLOBALG.A.P.](#), a pre-farm-gate standard that covers the whole agricultural production process, from before the plant is in the ground to the non-processed product. It is nearly impossible to supply grapes without GlobalG.A.P., as it has become practically a standard requirement for most supermarkets.

Examples of other food safety management systems that may 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 supplemental to GLOBALG.A.P. and are recognised by the [Global Food Safety Initiative \(GFSI\)](#).

### Tips:

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

### Social and environmental compliance

There is growing attention for the social and environmental conditions in the production of fresh fruit and vegetables. Most European buyers have a social code of conduct which they will expect

you to adhere to. As regards table grapes, social compliance is important, and for most large retailers this is a must, although product quality has top priority.

It can be a plus to be [GRASP](#) certified. With regard to social certification, GRASP, which is part of GLOBALG.A.P., is the most accessible 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:

- For a complete overview of buyer initiatives for social compliance, see the [Buyer requirements for fresh fruit and vegetables](#) on the CBI marketing intelligence platform.
- Examine your company's current performance, for example by completing a self-assessment on the [BSCI website](#).

## 6 . What are the requirements for niche markets?

### A growing niche market for organic table grapes

An increasing number of consumers prefer food products that are produced and processed by natural methods. Table grapes are a major fruit category and the current consumption share of organic products is between 1 and 8%. You can therefore assume an estimated market for imported organic grapes of around 25 thousand tonnes, and increasing. The demand for organic produce is especially strong in German-speaking and Scandinavian countries.

In order to market organic products in Europe, you have to use organic production methods according to [European legislation](#) and apply for an organic certificate with an accredited certifier.

### Tips:

- Consider organic as a plus, not as a must, and be prepared to comply with the whole organic process. Remember that implementing organic production and becoming certified can be expensive.
- Read more about organic farming and certification on the [International Federation of Organic Agriculture Movements \(IFOAM\) website](#).
- Find companies that specialise in organic produce that understand the market and have access to this niche market. Use databases such as [Organic-Bio](#).

## 7 . What competition will you be facing on the European table grape market?

### More competition through worldwide production

The table grape market is relatively large, but it is also supplied by many countries. Worldwide, competition is increasing and production volumes are becoming substantial. The worldwide grape production (including table grapes) has grown from an estimated 69 million tonnes in 2012 to 77

million tonnes in 2016. Be aware that an increase in production can easily impact the market conditions or affect the sales of a specific variety.

## The best opportunity is during the off-season

Your buyers will likely prefer to have a year-round supply of table grapes, especially when they are working with retail contracts. Therefore, they will carefully choose their suppliers and buy according to the seasons to obtain the best quality. Local sourcing has the preference, although price is leading.

The supply seasons of table grapes are different for the southern and northern hemispheres. As a supplier, you must be aware of your competition with overlapping seasons.

In the northern hemisphere, the season stretches from May until December, which is when Italy dominates the European market with additional supply from the Mediterranean region.

The European off-season offers the best opportunity for large volume from countries in the southern hemisphere. From November until May, Chile, South Africa and Peru are the leading suppliers of table grapes to Europe.

Figure 4: Indicative availability calendar of table grapes

	j	f	m	a	m	j	j	a	s	o	n	d
Egypt					■	■	■	■				
Spain						■	■	■	■	■	■	■
Italy							■	■	■	■	■	■
Peru	■	■	■	■							■	■
South Africa	■	■	■	■								■
Chile	■	■	■	■								
India (seedless)	■	■	■	■								

### Tips:

- Try to extend your season through excellent post-harvest and storage conditions.
- Compare your supply window with those of other suppliers. Production planning has become a vital aspect in seasonal competition.

## Trade flows are changing

With the European market growth slowing down, exporters have started to focus on new markets in Asia and the Middle East. For exporters, Europe is not always the best market for profit, but at the same time its size ensures a steady market for bigger volumes.

### Tip:

- Focus on a combination of export markets: include Europe for its large demand and Asia and other emerging regions for their growth opportunities.

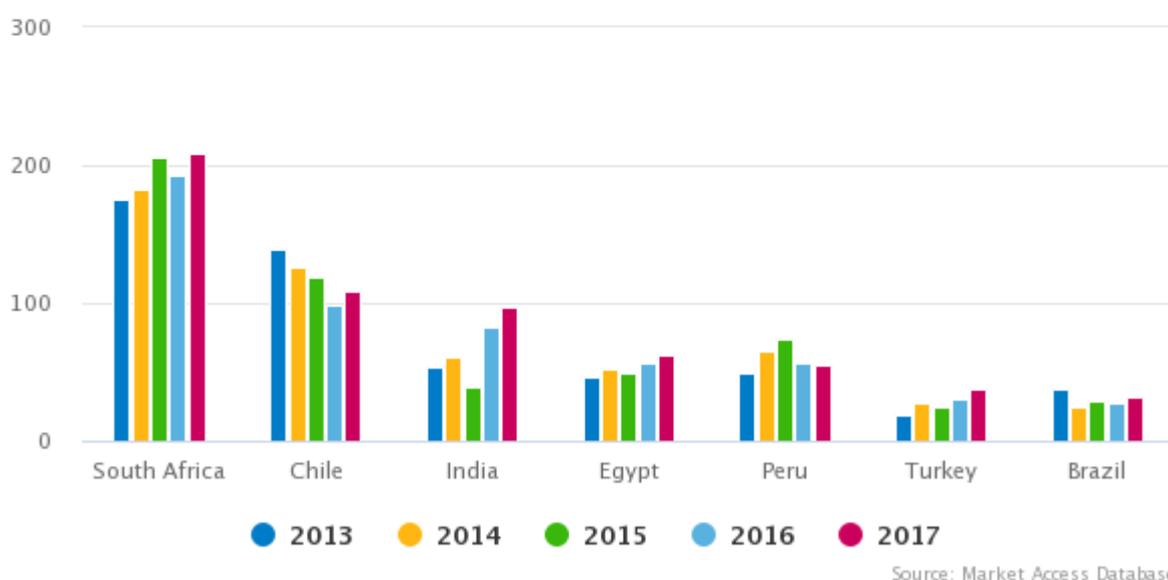
## New suppliers are stepping in

The traditional top-three exporters in the worldwide table grapes are Chile, Italy and the United States. However, their volumes are declining and new suppliers are filling the gaps.

On the European market, South Africa, Peru and India are increasing their market share significantly. Lesser known suppliers such as [Namibia](#), Moldova and Macedonia are also experiencing growth in Europe. Namibia is strategically located near South Africa and invests in different grape varieties. [Moldova](#) and Macedonia mainly export dark (and seeded) grape varieties to Eastern Europe to complement the dominant white grape production of Italian and Greek growers.

Figure 5: Main suppliers of table grapes to Europe 2013–2017

in 1,000 tonnes



## European production is declining

Europe produces an estimated 1.7 million tonnes of table grapes, with a majority share in Italy, Spain and Greece. Europe is the fourth-largest production region after China, India and Turkey. Unlike in the leading producing countries, however, the [general trend in Europe](#) is that production is declining. This means that even during the European season you will find demand for imported table grapes, especially for competitive high-quality produce.

### Tip:

- Try to read news and publications regularly to see what other exporters are saying, for example on [Freshplaza](#) and the [Fresh Fruit Portal](#). You can also use these channels to promote your company and inform your buyers.

## New varieties will keep the grape market dynamic

Strong competition increases the relevance of developing new table grape varieties. Grape growers, for example in [Spain](#), are looking to perfect taste and improve productivity. A growing number of varieties often have a focus on high-yielding seedless characteristics. Table grapes that

yield earlier or later in the season can become new competitors for current trades.

### Tips:

- Evaluate varieties on a continuous basis. When selecting a new variety, yield and production costs are important factors for your competitive position, but a superior taste will help you to become a preferred supplier.
- Look for cooperation or even integration with trusted client relations. More and more importers are interested in getting more directly involved in production. However, do not expect your buyer to bear all your costs.

## Scale and professional performance have become key

Entering the European market is a big hurdle for many companies, primarily because of certification and the need to meet buyer requirements. Successful growers are very professional and have scaled up their production. For small companies, it has become harder to compete. It is only useful to offer your product if you are able to enter into a supply programme.

In Europe, large retailers prefer larger suppliers because of supply certainty and compliance with quality requirements. As a supplier to European retailers, you are not in a position to argue about the rules of the game. Your buyer will switch easily to other suppliers if expectations are not met.

### Tips:

- Contact an experienced importer with supply programmes before entering the European market, especially if you are aiming for major retailers.
- Establish a credible track record, including transparent information on your company and product quality. Being part of a stable partnership and supply chain can help you maintain your position on the market.
- Read the [tips for doing business with European buyers](#) on the CBI market intelligence platform.

## Product competition

Table grapes are ideal as snack fruit. This gives them an advantage over fruit that has to be peeled, prepared or cut. Other easy-to-eat fruit such as [fresh berries](#) can substitute table grapes (especially when they are attractively priced, such as strawberries in season), other soft fruit as well as freshly cut fruit packages.

### Tip:

- Use the CBI platform to find more general information about the [competition you are facing on the European market for fresh fruit and vegetables](#).

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

### Traders become producers to supply supermarkets

Large retail organisations want to buy their table grapes as close to the source as possible. This way, they have more control and transparency. For fresh fruit traders, it is a trigger for getting more involved in production.

To become a successful supplier for large-volume buyers, you have to be prepared to integrate your business. Supermarkets demand a reliable volume and full service in packaging and logistics.

#### Tips:

- Find partnerships with service providers that can strengthen your position and help you to enter major retail programmes. Also see the [CBI tips for finding buyers on the European fresh fruit and vegetables market](#).
- Connect to importers by visiting trade fairs such as the [Fruit Logistica](#) in Berlin and [Fruit Attraction](#) in Madrid or use their online catalogues.

### A structural presence requires supply contracts

Supplying Europe with a principal fruit such as table grapes on a structural basis requires being part of a (retail) supply programme and not depending only on a spot market. The spot market is managed by wholesalers that supply smaller stores and street merchants. It can be an attractive channel when demand and prices are high, but when contracted suppliers start dumping their surplus production, your position as an independent supplier can be drastically affected.

#### Tip:

- Build a long-term strategy and find a way to become part of a (retail) supply programme. If you are not able to do this, make sure you have alternative markets to supply.

### Packers can help in quality and efficiency

Packing is an important part in the supply chain of table grapes. Supermarkets sell standard clamshells as well as more innovative packaging, but very few loose grapes. As an exporter, it can be interesting to explore potential cooperation with packers in Europe. This way you will be able to send more grapes per shipment, maintain good quality and comply with detailed specifications of local end clients.

More advanced processing than packing is not common for table grapes. Wine and dried grapes are often very different varieties and have little similarity to table grapes. If you are interested in the opportunities for processed grapes in Europe, have a look at the CBI studies on exporting [dried grapes](#), [fruit juices](#) and [wine](#) to Europe.

#### Tip:

- Consult the CBI market intelligence platform with general information about [the channels](#)

[through which you can get fresh fruit and vegetables onto the European market.](#)

## 9 . What are the end-market prices for fresh table grapes?

Table 2: Consumer price breakdown for table grapes

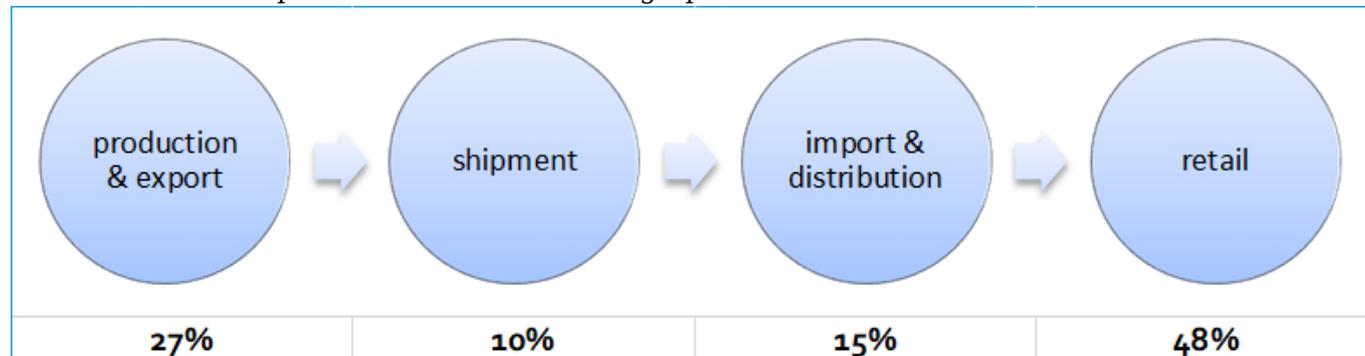


Table grapes in regular clamshells (500 grams) are sold for €5 to €7 per kilo in supermarkets. When on offer, the price lowers to €3 to €4 per kilo.

As an exporter, you have to be aware that there is not always a direct relation between trade prices and consumer prices.

### Tip:

- Find information about consumer prices in the online assortment of supermarket chains such as [Tesco](#), [Albert Heijn](#) (Dutch: “druiven”), [Rewe](#) (German: “trauben”), [Auchan](#) (French: “raisins”) and [Mysupermarkt.co.uk](#).

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