

Exporting dried grapes to Europe

The European Union is the largest importer of dried grapes in the world, with a market share of more than 50% of the world imports. Also dried grapes are the most important dried fruit in the European market, representing 40% of all dried fruit imports. Nearly 70% of all European imports of dried grapes are from Developing Countries.

Contents of this page

1. Product Description
2. Which European markets offer opportunities for exporters of dried grapes?
3. Which trends offer opportunities on the European market for dried grapes?
4. Which requirements should dried grapes comply with to be allowed on the European market?
5. What competition will I be facing on the European dried grapes market?
6. What are the end-market prices for dried grapes on the European market?

1. Product Description

Dried grapes are the dried, ripe fruit of the grapevine (*Vitis Vinifera*). The term "raisin" in English language is often used instead of dried grapes but in some countries, especially in the United Kingdom, there is distinction between 3 types of dried grapes (Figure 1). This report covers all 3 types of dried grapes and includes:

- Raisins: dark coloured seeded dried grapes, often from the Muscatel vine varieties. A frequently used variety is Thomson Seedless.
- Currants: purple/black dried grapes, from the seedless Black Corinth vine variety. Their name derives from the Greek city of Corinth and should not be confused with berry fruit such as blackcurrants or redcurrants.
- Sultanas: seedless, dried grapes of the golden yellow colour, from the seedless "sultana/sultanina" varieties. Like raisins, they are most often produced from the Thompson Seedless variety but due to bleaching treatment they gain a yellow colour.

Please take into consideration that in many countries there are different classification for dried grapes, which means there is no official internationally valid classification.

Picture 1: Three main types of dried grapes on the European market. Currants (left): small, reddish-blue, seedless; sultanas (middle): golden yellow, seedless; raisins (right): brownish-red to brown, mainly seeded.



Source: Gesamtverband der Deutschen Versicherungswirtschaft e. V. (GDV)

Grapes remain on the vine until they are overripe and, after picking, are dried in the air, in the sun, in the shade or in drying plants. Sundried grapes are usually less aromatic than grapes dried in the shade. Dried grapes can be bleached by sulphuring (sulphur dioxide - SO₂) which is the common production process of the golden yellow types. In order to prevent the raisins from agglomerating (sticking together), they may be treated with vegetable oil. Due to their high sugar content (65 - 70%), dried grapes are very sweet.

Table 1: Combined Nomenclature codes for dried grapes

Number	Product
08062010	Currants (in French: Raisins de Corinthe / in German: Korinthen)
08062030	Sultanas (in French: Sultanines / in German: Sultaninen)
08062090	Other dried grapes (in French: Raisins, secs / in German: Weintrauben, getrocknet)

Product Specification

Quality

For detailed quality requirements please refer to the [Commission regulation for the minimum marketing standards for dried grapes](#) and to the [Codex Alimentarius Standard for Raisins](#).

The basic quality requirements for dried grapes are:

- Fruit: whole and sound and free from insects, mould, pieces of stem and pedicels (except for muscatel types).
- Moisture content:
 1. Not less than 13 % and not more than 31 % for the Malaga/muscatel type.
 2. Maximum 23 % for seed-bearing varieties.
 3. Maximum 18 % for seedless varieties and currants.
- Food additives:
 1. Sulphur dioxide (applies to bleached raisins only) - maximum of 2000 ppm
 2. Oil (food grade) 5 g/kg
 3. Sorbitol 5 g/kg

Additional quality requirements

Although the EU marketing standard defines maximum moisture content it is a common requirement by the industry that moisture content is lower and it is usually 14-17% at the time of packing.

Important characteristic that influence the price of dried grapes, is the size of the fruit. As there is no official EU sizing standard importers sometimes refer to the [USA Standards for Processed Raisins](#). The common three sizes are jumbo, medium and small and sometimes so called 'bold size' which is between jumbo and medium. Sizes are calculated according to the number of fruits in 100 g of product or according to actual diameter of the fruit. It is still common in the industry that small sizes are referred to as "midget" and even "small midget" but the US Department of Agriculture in 2015 issued a regulation in August 2015 to stop referring to midget raisins as "midget" after an activist group called the term offensive. It is possible that the same issue could be raised in the European Union.

Labelling

- The name of the product should be "Raisins" or "Sultanas".
- If the dried grapes are bleached, part of the name has to include "Bleached", "Golden", or "Golden Bleached".
- In varieties which are naturally not seedless, the label should declare presence of the seeds with the terms such as "Seeded", "With Seeds Removed", "Non-Seeded", "Unseeded" or "With Seeds" except in cluster form and Malaga Muscatel type.
- If raisins intentionally do not have cap-stems removed, the name of the product has to include the description "Unstemmed" or a similar appropriate description, except in cluster form and Malaga Muscatel type.
- Dried grapes may be described as "Natural" when they have not been subjected to dipping in an alkaline lye and oil solution as an aid to drying nor subjected to bleach treatment.
- It is common that besides grading, specifications include the variety of the grapes.

Information for non-retail containers has to be given either on the container or in accompanying documents, except that the name of the product, lot identification, and the name and address of the manufacturer, packer, distributor or importer, as well as storage instructions, must appear on the container. However, lot identification, and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark, provided that such a mark is clearly identifiable with the accompanying documents.

In the case of retail packaging product labelling must be in compliance with the EU Regulation [1169/2011](#). This regulation came into effect on December 13, 2014 but the obligation to provide nutrition information will apply from December 13, 2016.

Packaging

Packaging used for dried grapes 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 grapes are usually packaged in carton boxes with plastic liner inside. They can also be packed in paperboard cartons or wooden boxes. Common packing sizes are 10, 12.5, 13.5, 14 and 15 kg. When packaged in corrugated or millboard cartons, the product should be transported on EURO pallets (80 x 120 cm) and further transported on containers. 20ft containers contain 1600 cartons x 12,5kg or 2 000 cartons x 10kg.

Duration of storage is usually 12 months in the relative humidity of 60-60% on the temperature between 4 and 20°C. In normal storage conditions shell life of the products should be 12 months.

Picture 2: Raisins export packaging



Source: www.21food.com

Picture 3: Sultanas export packaging



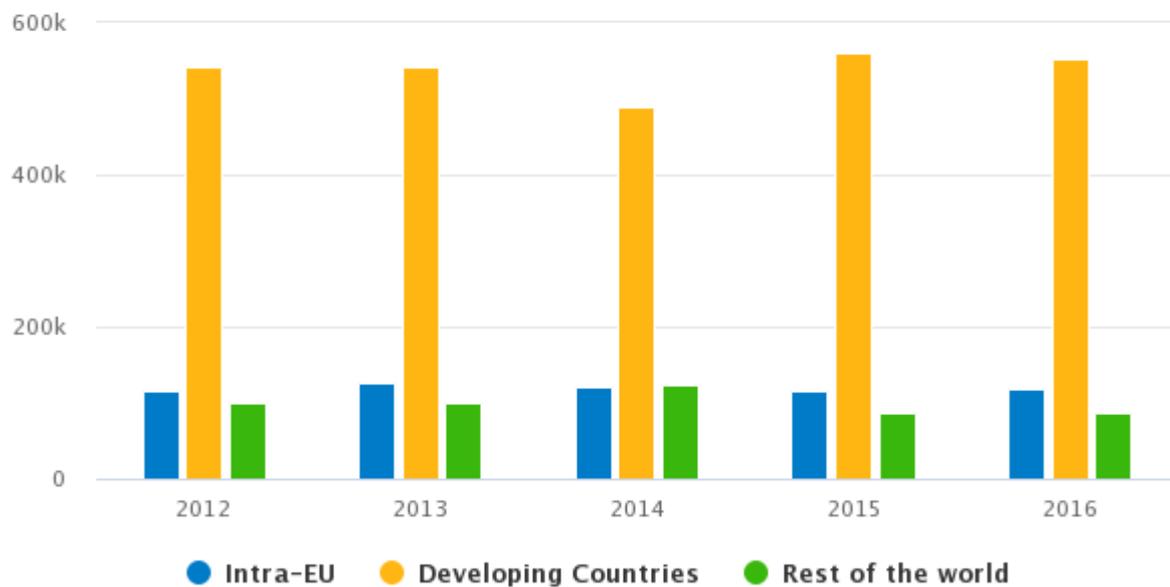
Source: www.21food.com

2. Which European markets offer opportunities for exporters of dried grapes?

For general overview of the statistical analysis of the processed fruit and vegetables sector in the European Union, please refer to [CBI Trade Statistics for Processed Fruit and Vegetables](#)

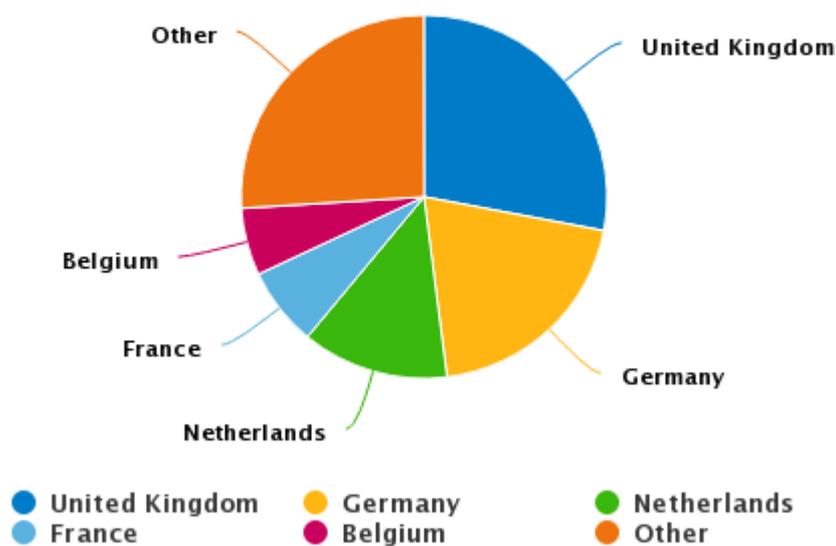
Imports

Figure 1: European import of dried grapes, by main origin
in 1,000 tonnes



Source: ITC Trademap

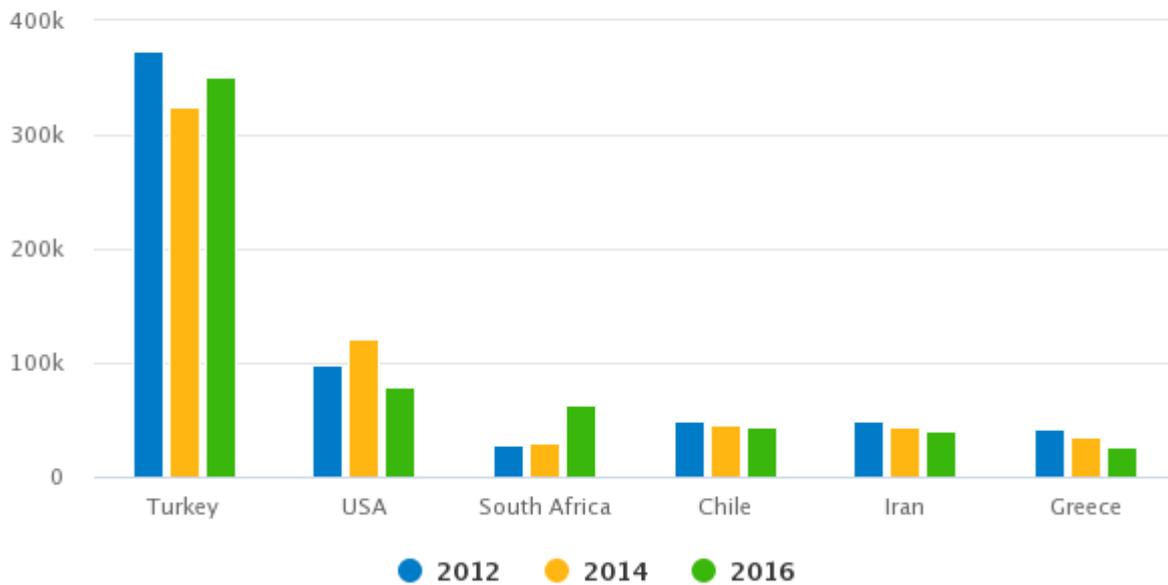
Figure 2: The European Union imports of dried grapes by country in 2016, share of imported quantity



Source: ITC Trademap

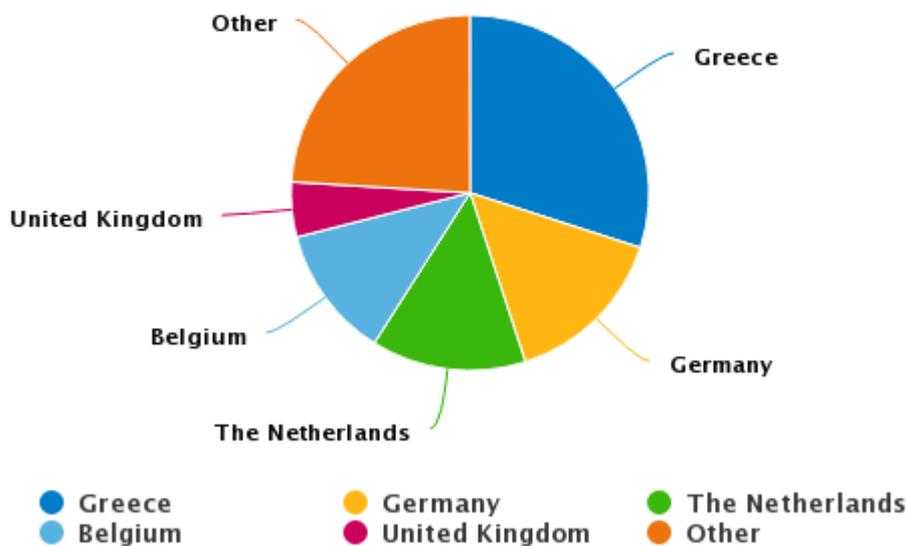
Figure 3: Main suppliers of dried grapes to Europe

in € 1,000



Source: ITC Trademap

Figure 4: European exports of dried grapes by country in 2016, share of exported quantity



Source: ITC Trademap

Analysis and interpretation

- Over the last five years, the import of dried grapes in the European Union remained stable, with either little to no change in quantity, or a slight increase in quantity, at €757 million and 409,000 tonnes in 2016. In a stable market, which Europe currently is, developing country suppliers have to compete on quality and price and to invest more in promoting the nutritional aspects of dried grapes. The European market for dried grapes is expected to increase in the long term.
- European imports of dried grapes are concentrated in three countries (the United Kingdom, Germany and the Netherlands), which together account for 61% of total European imports.

- The highest average annual import growth in quantity in the last five years was in Latvia (12%), which increased its imports from 13,000 tonnes in 2012 to 20,000 tonnes in 2016. Other countries with more significant annual import growth were Latvia (8% import growth), Belgium (7%) and Poland (7%).
- The largest imports from countries outside the European Union come from Turkey (46% market share) followed by the United States (10%) and South Africa (8%). The largest intra-European supplier is Greece which is ranked sixth, after Turkey, South Africa, Chile and Iran.
- In the range of the top ten developing country suppliers, the highest average annual import growth in the last five years was from South Africa (23%). In recent years some new developing country suppliers have started to emerge on the European markets (such as Uzbekistan with 25% annual import growth), but still with low quantities compared to leading suppliers.
- Export of dried grapes is led by Greece, which is the only significant producer of dried grapes in the European Union, followed by Germany, the Netherlands and Belgium, which are re-exporters. The main export destinations outside the European Union are Australia, Turkey, Switzerland and the United States. Almost all quantities imported to Turkey were from Greece, and these imports probably represented the addition of currants to the Turkish offer of other dried grape types in 2016.
- The highest average annual increase of exports of dried grapes from Europe in the last five years was to China (40%). The exports from the European Union to China increased from €184 thousand in 2012 to €717 thousand in 2016.
- In the last five years, exports of dried grapes from the European Union have decreased by 4% from 79,000 tons to 75,000 tons. However, some of the less significant dried grape exporting countries in terms of quantity have increased their exports, such as Croatia (134% annual export growth rate), Czech Republic (23%), Italy (12%) and Poland (11%).

Tips:

Besides targeting the largest importing countries, try to diversify your exports of dried grapes to fast growing markets such as Latvia or Poland.

Benchmark your company against your peers from leading supplying countries such as Turkey or the USA. Also learn from exporters which are gaining market share in Europe such as India or Uzbekistan.

Do not underestimate quality and safety requirements in the European Union. Meeting them requires modern processing lines and quality and safety systems. If you can meet them, however, you are likely to find a market in Europe.

Production and consumption

Figure 5: Production of dried grapes in the European Union

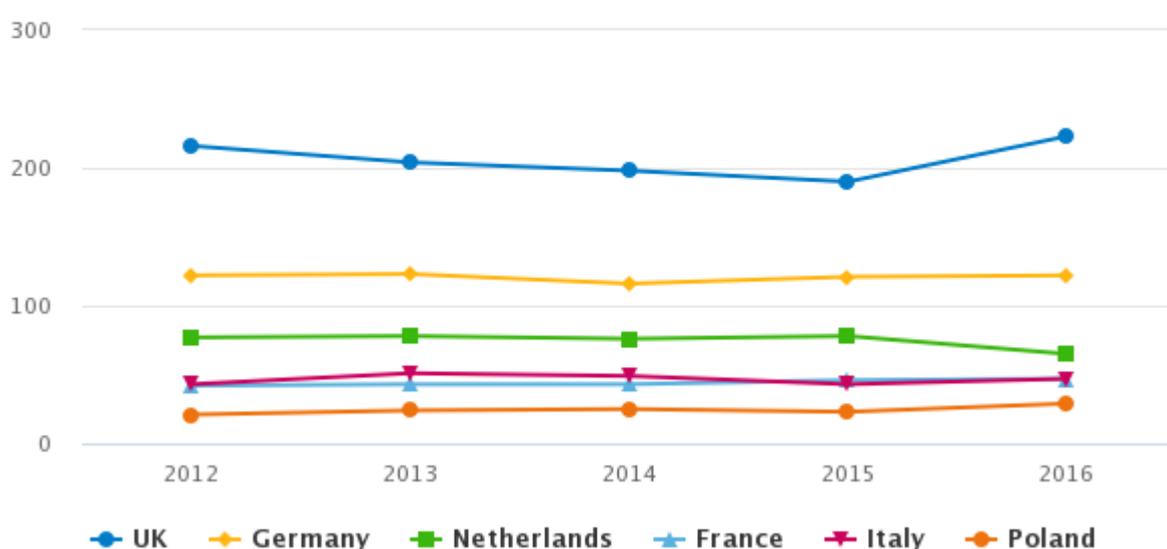
in € million



Source: Eurostat

Figure 6: Consumption of dried grapes in the European Union by largest consuming countries

in € million



Source: Eurostat

- More than 99% of all production of dried grapes in the European Union is from Greece. Other producing countries are Spain, Bulgaria, Cyprus and Italy.
- Production in Greece is not sufficient to supply European consumers, and consumption is strongly dependent on the production of grapes in the leading supplying countries, especially Turkey. In addition, Greece produces only currants and not sultanas. Though it is expected that a new crop in Greece will show a larger tonnage, it seems likely that prices of Greek currants could be going up, with decreasing supplies and a reluctance from farmers to increase the acreage available.
- The country with the highest consumption of dried grapes in Europe is the United Kingdom. Countries with

the highest per capita consumption are the Netherlands (2.6 kg per year), the United Kingdom (2.27 kg), Belgium (1.2 kg) and Germany (1 kg). In the major consuming countries, consumption decreased in 2014.

- The largest consumer segment of dried grapes in Europe is the bakery industry and retail.
- Sales of organic raisins as well as fair-trade products are increasing in the western European markets.

Tips:

Closely monitor the production of raisins and sultanas in Turkey and the United States and the production of currants in Greece, as it determines the world supply and price development.

It is always good to introduce different varieties and therefore prolong production season and lower the risk of weather damages.

Regular information about grape production, processing and the market situation can be found on the leading European information service for processed fruit and vegetables [FoodNews](#)

You can find information on international dried grapes production and consumption on the website of International [Nut and Dried Fruit Council](#).

3. Which trends offer opportunities on the European market for dried grapes?

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

Consumption of dried fruit including dried grapes in Europe continues to increase as dried grapes are considered to be a healthy snack and a healthy ingredient. In many bakery dietary products, dried grapes are increasingly used as a natural substitute for sugar.

Organic dried grapes are increasingly sold within the European Union. The European Union market for all organic products in 2013 totalled €22.6 billion, an increase of 7 % compared to previous year. Between 2009 and 2013, the organic market grew by almost 30%. Germany and France together represent over half of the EU organic market.

Dried grapes are becoming popular ingredient in “do it yourself” products for home baking.

Although they are not considered “superfruit”, dried grapes are often used in dried berry mixes together with other fruit. Here sultanas have a slight advantage over darker coloured dried grapes as they mix well with lighter coloured “superfruit” such as golden berries and red fruit.

There is an increasing demand for transparency in the origin, nutrition and quality of the product. Some of the large European traders are sourcing dried grapes only from partners which are members of [SEDEX](#) - an organisation dedicated to improvements of responsible and ethical business practices in global supply chains.

Some of the largest dried fruit packing and processing European companies are investing in Developing Countries by building production facilities.

Tips:

[Anuga](#) trade fair is the best place to monitor market trends and to meet potential prospects in Europe.

It is held every two years in Cologne in Germany.

Dried grapes exporters from developing countries can benefit from the current trend of healthy snacks, which include dried grapes with high dietary fibre content and as natural sweetener.

Invest in sorting equipment and in different varieties of dried grapes so you can meet demands of different buyers.

Use of the internet and social media are great opportunities to introduce your company and market dried grapes on the European markets.

Use the increasing opportunities in organic dried grapes.

Invest in environmental and Corporate Social Responsibility (CSR) standards as they are becoming more and more important in the European markets.

4. Which requirements should dried grapes comply with to be allowed on the European market?

In addition to the quality requirements mentioned above, for the general overview of the buyer requirements in the EU please refer to [CBI Buyer requirement for processed fruit and vegetables](#)

Specifically for dried grapes, consult the [EU Export Helpdesk](#) where you can select dried grapes under the specific HS codes 080620.

For information on commonly requested standards check the International Trade Centre's [Standards Map](#), an online tool which provides comprehensive information on over 170 voluntary sustainability standards and other similar initiatives covering issues such as food quality and safety.

Legal Requirements

All foods including dried grapes sold in the European Union 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 of specific products originating from particular countries, they can only be imported under stricter conditions 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 included in the Annex of Regulation (EC) 669/2009. At the moment (from March 2014) dried grapes from Afghanistan and Uzbekistan are on the list due to frequent occurrence of Ochratoxin A in export shipments. In cases of both countries there is an increased level of official controls and frequency of laboratory checks is 50%.

The most common problems that European Union importers are facing when importing dried grapes from Developing Countries are contamination with Ochratoxin A, too high content of pesticides residues, too high content of sulphites and infection with moulds. In 2014 and 2015 [European Rapid Alert System for Food and Feed](#) (RASFF) reported 16 cases of occurrence of Ochratoxin A of which 6 cases from Afghanistan, 6 from Uzbekistan, 1 from Australia, 1 from Chile, 1 from Turkey and 1 from Pakistan.

New legislation concerning the level of the pesticide [chlorpyrifos](#), effective from 10 August 2016, can seriously affect European imports of dried grapes from Turkey. There is a big risk that current remaining crops from Turkey cannot be exported to the EU due to general occurrence of chlorpyrifos. Following [advice on the health effects of these residues from the European Food Safety Authority](#), the MRL for a number of dried fruits including currants was revised downward to the “limit of quantification” of 0.01 ppm.

Labelling Requirements

In December 2014 [EU Regulation 1169/2011](#) went into effect. New labelling legislation forbids to mislead the consumer and to attribute to any food the property of preventing, treating or curing a human disease. Another change is allergens labelling where allergens have to be highlighted in the list of ingredients and requirements on information on allergens will also cover non pre-packed foods including those sold in restaurants and cafés. Also nutrition information is mandatory for most products. Although dried grapes are not on the list of the allergens, notification applies for sulphur dioxide and sulphites at concentrations of more than 10 mg/kg in terms of the total SO₂.

Common and niche requirements

- Food safety certification is a common request by the European Union importers. The most common certification schemes accepted on the European markets are [IFS](#), [FSSC22000](#) and [BRC](#).
- Environmental protection, organic and fair trade certification schemes are becoming more and more popular in the European Union. For organic production you can consider [IFOAM standard](#). The EU regulates both organic food and drink produced and/or processed within the EU and organic goods from elsewhere (Commission Regulation (EC) No. 1235/2008 with [detailed rules concerning import of organic products from third countries](#)). These can readily be imported from non-EU countries whose rules on organic production and control are equivalent to the EU's - currently Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, Tunisia, Switzerland and the USA. For all other non-EU countries, importers can [have their organic products certified for import into the EU](#) by independent private control bodies approved by the European Commission.
- As dried grapes are a very common ingredient in Jewish cuisine [Kosher](#) certification is becoming more popular among the exporters of dried grapes.

Tips:

The occurrence of ochratoxin A in dried grapes results from contamination and growth of ochratoxigenic fungi and short-term humid weather during drying. Therefore sufficient drying and storage under suitable conditions are the most important prevention measures. Refer to Codex Alimentarius for [Code of Hygienic Practice for Dried Fruits](#) and for. You need to develop ochratoxin A management system based on Hazard Analysis Critical Control Points (HACCP).

To find out the maximum residue levels (MRL) that are relevant for dried grapes, you can use the [EU MRL database](#) in which all harmonised MRLs can be found. For grapes there is a definition of maximum residue levels for 434 different pesticides. For the laboratory analysis you can contact some of the specialised testing companies such as [Eurofins](#).

Check with the importers and experts if the food safety certification company used is approved by the European Union buyers.

For the overview of the independent certification programmes aimed for environmental protection and corporate social responsibility you can refer to [supply chain of Mars](#) or to [CSR webpage of Ferrero](#).

5. What competition will I be facing on the European dried grapes market?

Product competition

Dried grapes are very common ingredient used in baking, snacks, breakfast cereals and confectionary industry including home use and HORECA sector and they are considered to be a natural candy due to high natural sugar content. However recently in many confectionary products dried grapes are substituted with so called dried "superfruit" with the dominance of cranberries. In the last 3 years import of dried cranberries in the European

Union has increased for 26% which is a significantly higher growth, compared to dried grapes.

Company competition

Exporters of dried grapes from Developing Countries should be aware of the main competitors from countries which are well established producers as well as countries that are gaining market share in the European markets. Companies from Turkey, USA, Chile, South Africa and China should be considered as main competing companies on the international markets. Images of dried grapes and prices that they are gaining on the European markets are different between countries. For example South African dried grapes are considered to be of premium quality and they are usually gaining higher prices although South Africa represents only 4% of world production.

Tips:

You can market dried grapes as natural product which is not sugar infused in competition with other dried fruit. Also raisins contain a naturally occurring organic acid called propionic acid. This substance serves as a natural mold inhibitor and has been proven to decrease mold growth in bakery products.

Try to find data about competitors from other countries who are present on the European market. You can quickly make a selection by searching on export promotion organisations from competitors' countries. The list of trade promotion organizations is available on the [ITC website](#). More specifically you can search on the websites of [Dried Fruit Promotion Committee of Turkey](#), [Raisins Agricultural Sales Cooperative Union](#), [The California Raisin Industry](#) or [Iran Dried Fruit Exporters Association](#).

Which channels can you use to put dried grapes on the European market?

Figure 7: Common trade channels for dried grapes on the European Union market

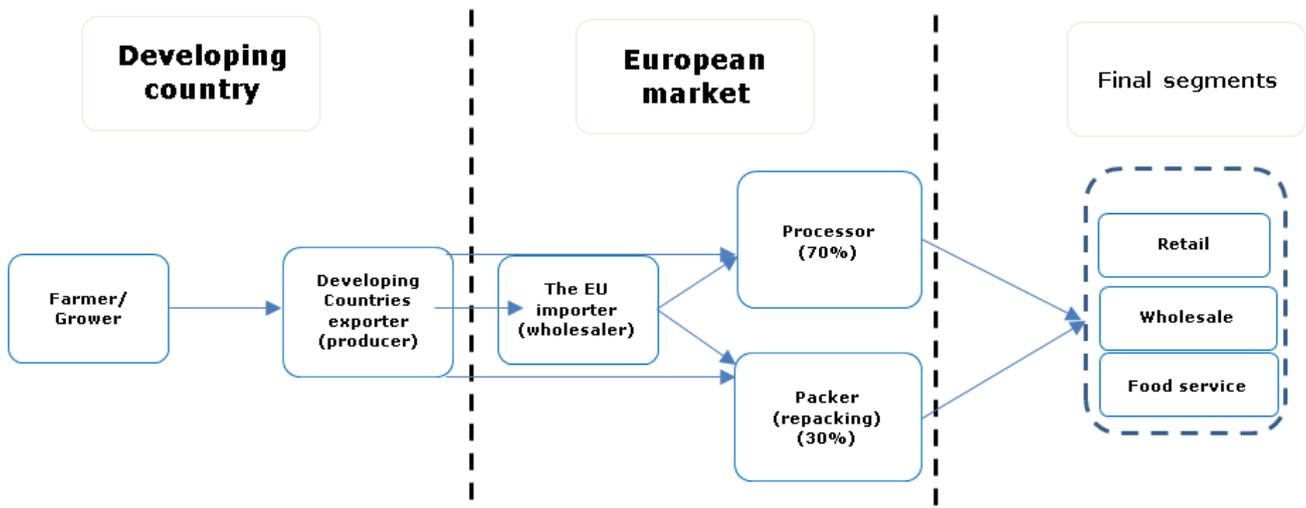
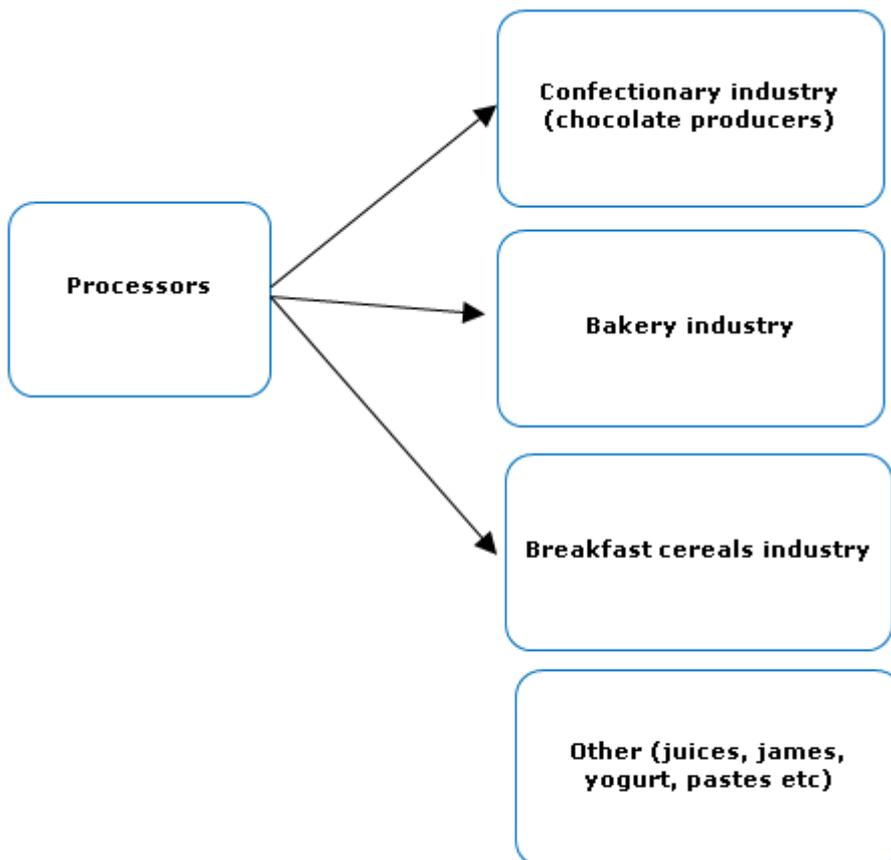


Figure 8: Use of the dried grapes by the food processing industry in the European Union



Around 70% of the imported dried grapes in the European Union are used as the ingredient for further processing and 30% is re-packed and sold by the retailers or used in HORECA sector (Figure 7).

Figure 8 shows the structure of the use of the dried grapes by the processing industry. They are used as an ingredient in chocolate production, bakery products and breakfast cereals. Smaller size raisins and currants are the most common choice for biscuit producers. Smaller quantities are used for processing into special jams, compotes, yogurt and juices.

Examples of trade channels for dried grapes in the European Union are:

- Importer (wholesaler): [QFN Trading and Agency](#), [Catz International](#), [John Morley](#), [Heinrich Bruening](#), [Terylinn](#)
- Packer (retail): [Community Foods](#), [Hancocks](#), [Seeberger](#), [Farmer's Snack](#)
- Processors:
 - Confectionary: [Nestle](#), [Mars](#), [Ferrero](#),
 - Bakeries: [Kraft](#), [Griesson Debaekelaer](#), [Hovis](#)
 - Breakfast cereals and yogurts: [Danone](#), [Kellog's](#), [Bokomo Foods](#)

Tips:

Dealing directly with European processor will bring added value as there is no margin by the connecting traders. However, for many confectionary companies it is not very common to buy directly as they usually source dried grapes from well establish traders.

For a list of European Traders of dried fruit you can consult European dried fruit trade associations' members' data bases such as [The National Dried Fruit Trade Association UK](#), [Netherlands Association for the Trade of the Dried Fruit, Spices and Allied Products](#) or [Waren-Verein](#).

6. What are the end-market prices for dried grapes on the European market?

Indication of margins according to final retail prices dried grapes is not precise and Developing Countries exporters can get only a very rough general overview of the price development. However, very roughly, it can be estimated that the CIF price represents around 25% of the retail price of a retail pack of dried grapes (which is packed in different retail sizes, usually between 100 g and 350g). The best option to monitor prices is to compare your offer with the offer from the largest competitors. The prices are also different between producing countries and prices from Turkey, as a leading world supplier, are usually higher than prices of other producing countries.

New crop first indication prices from Turkey are around USD 2500 (FOB) for sultanas. Below example shows the average price developments throughout the year of the leading supplying countries in 2015 (before the new crop):

- (CIF prices in USD per tonne):
 - Sultanas bold: 1750 - 1900
 - Sultanas standard: 1750 - 1900
 - Thompsons raisins jumbo: 1900 - 2200
 - Thompsons raisins bold: 1800 - 2000
 - Thompsons raisins medium: 1800 - 2000
 - Thompson small choice: 2000
 - Flames jumbo: 2050 - 2250
 - Flames medium: 1900
 - Golden medium choice: 2800 - 3000
 - Golden medium standard: 2350 - 2500
 - Golden bold choice: 3200 - 3400
 - Golden bold standard: 2800
 - Golden jumbo choice: 4850
 - Golden jumbo standard: 3750 - 4100
 - Orange river sultanas: 2450 - 2600
 - Crimson jumbo: 1950
 - Black jumbo: 1900 - 1950

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