Annex – Processed fruit and vegetables import trends in Europe

This annex to the CBI study on statistics and outlook on the European market of processed fruit and vegetables provides a deeper analysis of three large product groups separated by trade volume and their shares of the total European imports of processed fruit and vegetables as follows:

1. Large volumes – products whose imports value account for more than 1% of all European processed fruit and vegetables and edible nuts imports;
2. Medium-sized volumes – between 0.5% and 1%;
3. Small volumes – less than 0.5%.

A 1% share may seem like a low cut-off because only 30 products exceed that limit. However, we are still talking about relevant import volumes. For example, canned fruit mixtures is a product group with exactly 1% import share, the volumes is still 160 thousand tonnes, which is significant.

The tables show import values, as it is a more reliable indicator when comparing different types of products. Still, volumes place products in roughly similar positions, which is also true for individual supplying countries. The differences are negligible.

Large volumes: products with more than 1% import share

Table 1. European top imports of processed fruit and vegetables with a 1% import share

Product	Total import value, 2019, in € million	Import value from developing countries 2019, in € million	Import share from developing countries 2019	Average annual import growth rate in value 2015–2019	Annual growth rate of imports from developing countries 2015–2019
Shelled almonds	2536	50	2%	-4.0%	12%
Frozen vegetables	1659	335	20%	2.1%	4%
Shelled cashew nuts	1425	1170	82%	6.4%	6%
Orange juice with Brix below 20	1398	434	31%	2.9%	-3%
Concentrated orange juice	1363	944	69%	-5.8%	-6%
Frozen fruit	1232	443	36%	6.4%	7%
Shelled hazelnuts	1134	887	78%	-7.8%	-8%
Canned vegetables	1127	262	23%	5.2%	5%
Canned single fruit	1112	477	43%	6.4%	5%
Shelled groundnuts	995	757	76%	1.7%	2%
Fruit jams, jellies, marmalades, purées or pastes	990	127	13%	0.6%	-8%
Tomato pastes and purees	980	133	14%	-2.2%	-7%
Mixtures of fruit juices	966	17	2%	10.3%	3%
Tropical and other fruit juices	863	268	31%	3.0%	5%
Pistachios in shell	852	59	7%	1.8%	-24%
Canned tomatoes	817	39	5%	0.4%	0%
Table olives	797	192	24%	6.2%	6%
Dried grapes	781	617	79%	0.5%	2%
Shelled walnuts	751	297	39%	-1.1%	2%
Other canned vegetables and vegetable mixtures	691	24	4%	11.2%	11%
Pickled vegetables	619	243	39%	4.0%	6%
Dried vegetables	612	210	34%	1.6%	1%
Concentrated apple juice	586	156	27%	-0.3%	-1%
Pine nuts, pecans and other nuts	581	223	38%	5.3%	-2%

Product	Total import value, 2019, in € million	Import value from developing countries 2019, in € million	Import share from developing countries 2019	Average annual import growth rate in value 2015–2019	Annual growth rate of imports from developing countries 2015–2019
Frozen small berries	562	276	49%	-5.0%	-4%
Frozen strawberries	541	237	44%	7.8%	15%
Canned sweetcorn	462	28	6%	2.7%	-1%
Frozen mixtures of vegetables	404	6	1%	3.1%	3%
Frozen orange juice	403	185	46%	-3.6%	-6%
Dried dates	395	83	80%	9%	9%
Mixtures of canned fruit	344	53	15%	2.4%	0%

Source: Trade Map

When analysing the table above, the most promising products for exporters from developing countries are cashew nuts, frozen fruit, tropical juices and purees, peanuts, dates, shelled walnuts and canned tropical fruit.
Some other products also belong to the list of top imported products, but supply is strongly dominated by only a few suppliers. This market concentration limits opportunities for new suppliers. Examples are orange juice (Brazil), frozen vegetables (intra-European supply), hazelnuts (Turkey), canned vegetables (intra-European supply) or apple juice (China and Poland).
In spite of not ranking among the five leading products in import share, the following products also contributed significantly to the growth in imports from developing countries: table olives, dried grapes, pickled vegetables, dried vegetables, and pine nuts.

Medium-sized volumes: products with 0.5% to 1% import share

Table 2. European imports of processed fruit and vegetables with a 0,5% to 1% import share

Product	Total imported value 2019, in € million	Import value from developing countries 2019, in € million	Import share from developing countries 2019	Total annual import growth rate 2015–2019 in value	Annual import growth rate from developing countries 2015–2019
Pickled cucumbers and gherkins	331	127	38%	6%	8%
Canned or preserved button mushrooms	312	5	2%	4%	-26%
Canned pineapples	307	236	77%	-7%	-9%
Apple juice with Brix value <= 20	304	4	1%	6%	-4%
Shelled pistachios	289	110	38%	3%	-1%
Canned beans	276	10	3%	3%	7%
Homogenised preparations of jams, fruit or nut purées and nut paste	258	5	2%	9%	-15%
Dried peaches, pears, papaws "papayas", tamarinds and other edible fruits	256	120	47%	-1%	-3%
Mixtures of nuts or dried fruits	253	10	4%	1%	-6%
Concentrated single citrus fruit	252	107	43%	-3%	-2%
Dried (infused) cranberries	251	14	6%	7%	-8%
Canned green beans	236	91	39%	4%	9%
Walnuts in shell	231	46	20%	-1%	4%
Canned peas	226	11	5%	1%	1%
Canned peaches	214	12	5%	-3%	-3%
Canned and preserved asparagus	199	179	90%	-4%	-4%

Product	Total imported value 2019, in € million	Import value from developing countries 2019, in € million	Import share from developing countries 2019	Total annual import growth rate 2015–2019 in value	Annual import growth rate from developing countries 2015–2019
Canned and preserved citrus fruit	193	84	43%	5%	8%
Desiccated coconuts	193	154	80%	-5%	-5%
Canned preserved strawberries	189	12	6%	3%	1%
Prunes	184	87	48%	-10%	-8%
Frozen green beans	180	14	8%	2%	19%

Source: Trade Map

In the group of products whose import share falls between 0.5% and 1% (see table 2), the following products contributed the most to the growth in imports from developing countries (the leading developing countries of origin for each product group are also indicated):

1. Pickled cucumber and gherkins – Turkey, India, Serbia, Vietnam, Lebanon and Egypt;
2. Canned and preserved beans – Lebanon, China, Turkey, Mexico, India and Jordan;
3. Canned and preserved green beans – Kenya, Madagascar, India, China, Cameroon and Turkey;
4. Walnuts in shell – Chile, Argentina, Ukraine, Moldova, South Africa and China;
5. Canned preserved citrus fruit –Turkey, China, South Africa, Peru, Eswatini and Morocco.

Small volumes: products with less than 0.5% import share

Table 3: European imports of processed fruit and vegetables with a less than 0,5% import share

Product	Total imported value 2019, in € million	Import value from developing countries 2019, in € million	Import share from developing countries 2019	Total annual import growth rate 2015–2019 in value	Annual import growth rate from developing countries 2015–2019
Dried onions	166	81.1	49%	-3%	-4%
Brazil nuts	165	106.3	64%	-2%	-6%
Macadamia nuts	160	93.2	58%	6%	10%
Canned and preserved cherries	148	12.0	8%	0%	-5%
Chestnuts	147	41.5	28%	5%	19%
Frozen spinach	137	2.4	2%	3%	5%
Frozen sweetcorn	133	17.5	13%	-1%	17%
Groundnuts in shell	128	90.2	71%	0%	8%
Canned peas	127	4.9	4%	0%	12%
Dried apricots	126	106.2	84%	-7%	-8%
Candied fruit and vegetables	124	28.8	23%	0%	-1%
NFC pineapple juice	124	61.4	50%	-4%	-8%
Concentrated pineapple juice	122	81.1	66%	-16%	-16%
Concentrated grape juice	117	7.4	6%	-4%	-3%
Grape juice with Brix value <= 30	108	0.3	0%	0%	-13%
Dried mushrooms	107	66.6	62%	-2%	-3%
Dried apples	96	33.1	34%	2%	0%
Cranberry juice	90	12.7	14%	-6%	9%
Canned apricots	89	23.7	27%	-3%	-7%
Canned pears	87	25.7	30%	-2%	-3%
Concentrated grapefruit juice	80	41.1	52%	2%	7%

Product	Total imported value 2019, in € million	Import value from developing countries 2019, in € million	Import share from developing countries 2019	Total annual import growth rate 2015–2019 in value	Annual import growth rate from developing countries 2015–2019
Grapefruit juice with Brix value <= 20	75	30.5	41%	-1%	8%
Almonds in shell	68	2.0	3%	3%	-4%
Canned and preserved mushrooms	57	14.4	25%	5%	5%
Retail packed baby food	55	4.4	8%	5%	24%
Citrus fruit jams, jellies, marmalades, purées or pastes	49	2.2	5%	0%	1%
Other frozen leguminous vegetables	42	10.9	26%	4%	0%
Shelled chestnuts	37	1.4	4%	7%	-18%
Canned and preserved palm hearts	37	31.6	85%	-2%	-2%
Tomato juice	37	1.3	4%	1%	10%
Canned and preserved bamboo shoots	35	24.5	70%	-2%	0%
Dried “Agaricus” mushrooms	27	5.8	22%	0%	-15%
Hazelnuts in shell	23	3.0	13%	-17%	-40%
Cashew nuts in shell	7	1.6	25%	-8%	-16%
Dried wood ears mushrooms	6	5.9	91%	1%	1%
Brazil nuts in shell	5	0.8	16%	-8%	-18%
Macadamia nuts,in shell	3	0.6	22%	-18%	-32%
Kola nuts	2	1.3	81%	1%	9%
Dried jelly fungi	1	0.5	78%	-11%	-7%

Source: Trade Map

Table 3 details the group of products with less than 0.5% share of European imports of processed fruit and vegetables. The product with the most potential for developing country exporters in this group is shelled macadamia nuts, which recently experienced very strong import growth.

In the group of products with an import share lower than 0.5% (see table 3), the following products contributed the most to the growth in imports from developing countries (the leading developing countries of origin for each product group are also indicated):

1. Shelled macadamia nuts – South Africa, Kenya, Guatemala, Malawi, Vietnam and Brazil;
2. In-shell groundnuts – Egypt, China, Togo, Argentina, India and Cameroon;
3. Concentrated grapefruit juice – South Africa, Mexico, Paraguay, Cuba, Argentina and Belize;
4. In-shell chestnuts – Turkey, Chile, Albania, China, North Macedonia and Georgia;
5. Frozen sweetcorn – Serbia, Vietnam, Peru, Moldova, Turkey and China;