



## 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 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%.

### Large volumes: products with more than 1% import share

Table 1: European top imports of processed fruits and vegetables with a 1% and higher import shares

Product	Total import value, 2021, in € million	Import value from developing countries, 2021, in € million	Import share from developing countries, 2021	Average annual import growth rate in value 2017-2021	Annual growth rate of imports from developing countries 2017-2021
Shelled almonds	2,001	18	0,9%	0,0%	6%
Mixtures of nuts and other seeds	1,845	665	36,0%	4,3%	4%
Frozen vegetables	1,447	250	17,2%	0,1%	0%
Shelled cashews	1,298	902	69,5%	-3,4%	-2%
Shelled hazelnuts	1,226	691	56,4%	2,1%	1%
Orange juice with Brix below 20	1,170	326	27,8%	-0,3%	0%
Canned fruit (mainly tropical)	1,120	392	35,0%	4,3%	7%
Canned vegetables	1,115	235	21,0%	4,3%	4%
Fruit jams, jellies, marmalades, purées or pastes	1,000	178	17,8%	2,0%	6%
Concentrated orange juice	990	531	53,7%	-9,4%	-10%
Tropical and other fruit juices	981	215	21,9%	4,4%	0%
Frozen berries	980	464	47,3%	12,5%	17%
Shelled groundnuts	914	634	69,3%	-2,0%	0%
In-shell pistachios	872	119	13,7%	4,6%	-1%
Table olives	773	173	22,3%	4,1%	2%
Shelled walnuts	734	144	19,6%	-1,0%	0%
Mixtures of fruit juices	653	8	1,2%	-2,7%	11%
Canned tomatoes	651	32	4,9%	5,8%	1%
Dried vegetables	642	196	30,5%	-0,7%	-6%
Pine nuts, pecans, and other nuts	598	210	35,1%	6,4%	11%
Prepared vegetables, frozen	581	18	3,1%	4,6%	22%
Pickled vegetables and fruit	564	226	40,0%	4,2%	8%
Canned groundnuts	539	27	5,0%	1,9%	19%
Concentrated apple juice	529	142	26,9%	-3,0%	-5%
Frozen strawberries	501	215	42,9%	2,6%	12%
Dried grapes	487	321	65,9%	0,4%	3%



Product	Total import value, 2021, in € million	Import value from developing countries, 2021, in € million	Import share from developing countries, 2021	Average annual import growth rate in value 2017-2021	Annual growth rate of imports from developing countries 2017-2021
Canned sweetcorn	384	25	6,5%	3,0%	16%
Canned pineapples	380	280	73,5%	-3,2%	-5%
Mixtures of vegetables, frozen	374	4	1,0%	1,6%	7%

Source: Trade Map

When analysing the table above, the most promising products for exporters from developing countries are nuts and seed mixtures and preparations, frozen berries, frozen strawberries, pine nuts, pickled fruit and vegetables and canned tropical fruit. All of these experienced strong growth in the last five years and made the largest contributions to import growth from the developing countries. Other products also belong to the list of top imported products with strong growth, but their supply is strongly dominated by only a few suppliers. This market concentration limits opportunities for new suppliers. Examples are almonds (the USA), frozen vegetables (intra-European supply), hazelnuts (Turkey), canned vegetables (intra-European supply), retail packed jams (mostly produced in Europe), mixtures of fruit juices (mostly bottled in Europe), processed tomatoes (Italy and China), orange juice (Brazil) and dried grapes (Turkey). Several products experienced sharp average annual declines in import value during the last five years. These included shelled cashew nuts (-2%/year), orange juice (-10%/year), dried vegetables (-6%/year), concentrated apple juice (-5%/year) and canned pineapples (-5%/year).

## 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 import value, 2021, in € million	Import value from developing countries, 2021, in € million	Import share from developing countries, 2021	Average annual import growth rate in value 2017-2021	Annual growth rate of imports from developing countries 2017-2021
Canned fruits and nuts mixtures	335	35	10,3%	3,4%	2%
Pickled cucumbers and gherkins	335	149	44,4%	7,5%	13%
Frozen orange juice	333	79	23,8%	-8,8%	-8%
Canned or preserved button mushrooms	322	4	1,4%	4,0%	-16%
Shelled pistachios	315	149	47,4%	7,4%	13%
Apple juice with Brix below 20	279	2	0,6%	2,4%	-15%
Desiccated coconuts	274	186	67,9%	3,4%	3%
Dried peaches, pears, papaws "papayas", tamarinds and other edible fruits	247	92	37,2%	3,1%	6%
Canned beans	235	9	3,8%	7,5%	13%
Crushed or ground peppers	234	90	38,5%	9,6%	11%
Dried cranberries	227	0	0,1%	5,9%	-21%
Concentrated single citrus fruit juice	218	80	36,7%	-5,2%	-7%
Canned peaches	215	9	4,3%	1,8%	-2%
In-shell walnuts	210	10	4,8%	-8,7%	2%
Frozen green beans	200	10	5,0%	1,3%	-6%
Canned asparagus	195	165	84,3%	-1,6%	-1%



Product	Total import value, 2021, in € million	Import value from developing countries, 2021, in € million	Import share from developing countries, 2021	Average annual import growth rate in value 2017-2021	Annual growth rate of imports from developing countries 2017-2021
Dried prunes	194	29	14,8%	-0,6%	11%
Concentrated pineapple juice	190	95	50,1%	-1,8%	-2%
Homogenised preparations of jams, jellies, marmalades, fruit or nut purées and nut pastes	188	4	2,2%	-1,5%	13%
Frozen potatoes	181	1	0,3%	2,1%	17%
Mixtures of nuts or dried fruits	180	5	3,0%	-3,3%	12%
Dried onions	173	88	51,0%	3,8%	6%
Canned strawberries	173	9	5,2%	-0,7%	-2%
Dried peppers	172	140	81,7%	4,7%	5%

Source: Trade Map

Table 2 details the group of products with import share of 0.5-1% of European imports of processed fruits and vegetables. The products with the most potential for developing country exporters in this group are pickled cucumbers and gherkins, shelled pistachios, canned beans and crushed or ground peppers, all of which recently experienced strong import growth.

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 cucumbers and gherkins (Turkey, India)
2. Shelled pistachios (Iran, Turkey)
3. Crushed or ground peppers (China, India, Thailand, Turkey)
4. Dried peppers (China, Peru, Mexico)
5. Desiccated coconuts (Philippines, Indonesia, Sri Lanka)
6. Dried onions (India, Egypt, China)
7. Dried peaches, pears, papayas and other fruit (China, Turkey, Thailand)

## 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% imports share

Product	Total import value, 2021, in € million	Import value from developing countries, 2021, in € million	Import share from developing countries, 2021	Average annual import growth rate in value 2017-2021	Annual growth rate of imports from developing countries 2017-2021
Pineapple juice with Brix below 20	168	12	6,9%	-0,5%	15%
Frozen beans	165	9	5,3%	1,7%	7%
Shelled macadamia nuts	157	88	56,4%	7,4%	13%
Single citrus fruit juice with Brix below 20	156	9	5,5%	3,0%	3%
In-shell groundnuts	152	88	58,3%	1,9%	4%
Fruit and nut flour, meal and powder	149	31	20,7%	7,3%	13%
Canned and preserved cherries	148	14	9,1%	-1,3%	1%
Canned and preserved citrus fruit	142	46	32,1%	0,6%	1%
Dried apricots	141	114	80,8%	6,0%	6%
Shelled Brazil nuts	133	83	62,6%	2,6%	6%



Product	Total import value, 2021, in € million	Import value from developing countries, 2021, in € million	Import share from developing countries, 2021	Average annual import growth rate in value 2017-2021	Annual growth rate of imports from developing countries 2017-2021
In-shell chestnuts	128	34	26,5%	2,6%	2%
Frozen spinach	122	2	1,3%	0,2%	26%
Concentrated grape juice	119	4	3,1%	4,3%	15%
Dried mushrooms and truffles	119	70	58,8%	0,6%	4%
Canned peas	117	8	6,9%	1,2%	31%
Frozen sweetcorn	105	13	12,5%	3,6%	11%
Grape juice with Brix below 30	103	0	0,3%	-0,1%	26%
In-shell almonds	98	1	1,3%	17,4%	-17%
Candied fruit and vegetables	98	22	22,5%	-1,4%	-2%
Canned and preserved apricots	94	23	24,4%	-1,5%	-1%
Dried apples	79	21	26,7%	-1,4%	2%
Canned and preserved pears	78	17	21,5%	-0,2%	2%
Cranberry juice	71	0	0,3%	-3,7%	-23%
Grapefruit juice with Brix below 20	61	8	13,4%	-7,7%	6%
Concentrated grapefruit juice	56	19	34,6%	-4,4%	-2%
Pulse flour, meal and powder	53	2	3,5%	28,3%	26%
In-shell hazelnuts	51	3	6,1%	21,3%	77%
Retail-packed baby food	43	2	3,9%	2,5%	18%
Frozen beans	41	10	22,9%	2,8%	4%
Canned and preserved bamboo shoots	38	25	64,3%	4,0%	6%
Shelled chestnuts	37	3	8,7%	-3,3%	23%
Citrus fruit jams, jellies, marmalades, purées or pastes	35	2	4,8%	-3,1%	4%
Canned and preserved palm hearts	32	25	79,3%	-4,0%	-2%
Tomato juice	22	1	5,3%	-0,2%	11%
Dried button mushrooms	19	5	26,8%	-6,9%	-8%

Source: Trade Map

Table 3 details the group of products with less than 0.5% share of European imports of processed fruits and vegetables. The products with the most potential for developing country exporters in this group are shelled macadamia nuts, fruit and nut flours and dried apricots, all of which recently experienced 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):

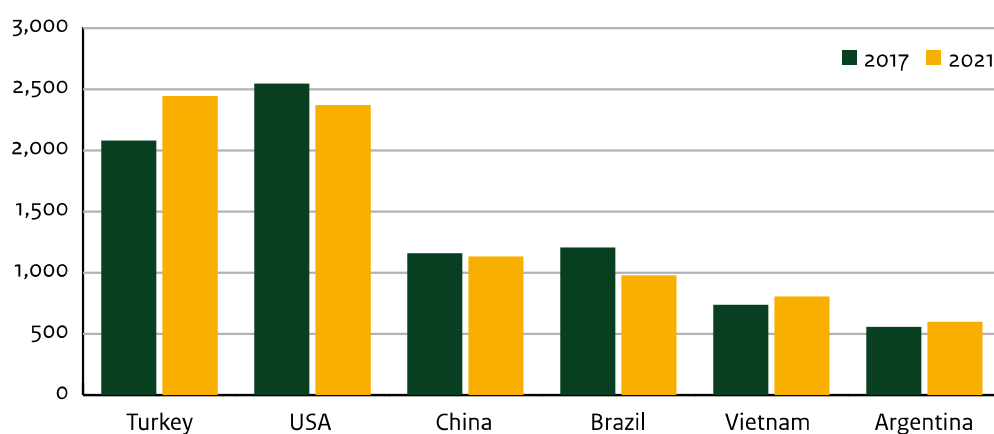
1. Shelled macadamia nuts (South Africa, Kenya, Malawi)
2. Dried apricots (Turkey)
3. Shelled Brazil nuts (Bolivia, Brazil, Peru)
4. In-shell groundnuts (Egypt, China)
5. Fruit and nut flours (Turkey, Vietnam, Chile)
6. Dried mushrooms and truffles (China, Serbia)



## Leading suppliers of processed fruit and vegetables to Europe

Turkey is the leading supplier of processed fruit and vegetables to Europe in terms of value, mostly because of its hazelnuts, hazelnut paste and dried grapes exports. The United States comes second, as the leading European supplier through the high value of its nuts exports (including almonds, pistachios, and walnuts). China is the third largest exporter with top exports in pine nuts, frozen and dried vegetables. Brazil is the fourth largest exporter through its orange juice exports. Vietnam is the fifth largest exporter thanks to its cashew nuts exports. Argentina is ranked sixth with peanuts, and lemon juice as top exported products.

Figure 1: Leading external suppliers of processed fruit and vegetables to EU27, in EUR millions



Source: Eurostat

To be successful on the European market, you should constantly monitor the offer of the leading supplying countries and compare yourself with successful exporters. Keep in mind that it would be challenging to be price-competitive with the leading producers so find your own unique selling proposition. You can find many examples on how to be authentic in the CBI study on Doing Business with European Buyers of processed fruit and vegetables.

Other developing countries stand out in different product groups. Table 4 below breaks down the leading suppliers per product group.



Table 4: Leading developing country suppliers of processed fruit and vegetables to EU27, 2021

Product group	Top 5 developing country suppliers to Europe	Top products per product group
Preserved Fruit and Vegetables	Turkey China Peru Thailand India	Jams/Pickled cucumbers/Olives Canned asparagus/Canned fruit Canned vegetables/Canned asparagus Canned pineapples/Canned tropical fruit Canned fruit/Pickled cucumbers/Pickled vegetables
Fruit Juices and Concentrates	Brazil Turkey Costa Rica Mexico Argentina	Orange juice incl. frozen Pomegranate juice/Concentrated apple juice Pineapple juice Frozen orange juice Single citrus fruit juice
Frozen Fruit and Vegetables	Serbia Egypt China Ukraine Morocco	Frozen berries Frozen strawberries/frozen vegetables Frozen asparagus/broccoli Frozen berries Frozen strawberries/frozen berries
Edible Nuts	Turkey Vietnam Argentina Chile China	Hazelnuts/Canned nut mixes Shelled cashew nuts Shelled groundnuts Shelled and in-shell walnuts/shelled hazelnuts Pine nuts/Shelled groundnuts
Dried Fruit and Vegetables	China Turkey Chile Philippines India	Dried vegetable mixes/dried peppers Dried grapes/dried apricots Dried prunes/dried grapes Desiccated coconuts Dried onions/dried vegetable mixes

Source: Eurostat