CBI
Ministry of Foreign Affairs

CBI Product Factsheet:

Pickled cucumbers and gherkins in Germany

Introduction

Germany is a large market for pickled cucumbers and gherkins: both production and consumption of pickled fruits and vegetables including cucumbers and gherkins are the highest in Europe (about 500 thousand tonnes). This product factsheet provides you with information on product specifications, statistics, trends, market channels and segments, and competitiveness in relation to pickled cucumbers and gherkins in the German processed fruit and vegetables market.

Product description

Product Definition (mandatory)

Pickled cucumbers and gherkins are cucumbers (vegetable) that are processed and sealed in an airtight container. The key processing method is preserving pickled cucumbers by marinating and storing them in an acid solution, usually vinegar, or a sweet and acid solution. The cucumbers are made shelf-stable at ambient temperatures. Please see the Annex for the full table with the products and its product codes for pickled cucumbers and gherkins.

Product Specification

Quality:

Pickled cucumbers and gherkins must have normal colour characteristics typical of the variety, type of pack, and style. The texture must be reasonably firm, crisp, and practically free from shrivelled, soft, and flabby items and reasonably free from very large seeds. They must have a good flavour typical of the type of pack and in considering any characteristic flavouring or special ingredients used. The size uniformity requirements depend on the cutting style and shall be substantially free from defects.
See also the information on size quality requirements for pickled cucumbers in the Codex Alimentarius ('Food code' of WHO and FAO).

Labelling:

General labelling standards are compulsory for pickled cucumbers and gherkins. Consumer labelling must be in accordance with the rules and regulations applicable in the EU and EFTA market. Labels cannot contain any toxic ink or glue. See the EU Regulation 1169/2011 or Codex General Standard for the Labelling of Pre-packaged Foods (CODEX STAN 1-1985), which establishes the general rules on labelling of pre-packaged food sold on the EU market. Packaged pickled cucumbers and gherkins sold in retail or used in the catering market must be marked with following information:

- Name under which the product is sold. For canned pickled cucumbers and gherkins, generally "Gurken" in German;
- List of ingredients;
- Quantity of ingredients or categories of ingredients;
- Net quantity. Often both the total gross and net contents are mentioned. Since cucumbers are a solid product, the quantity is stated in a unit of weight (g);
- Date of minimum durability consisting of day, month, and year, in that order, and preceded by the words "best before:…" or "best before end:…" (in German: "mindestens haltbar bis":…) or the "use by:…" (in German: "zu verbrauchen bis":…) date;
- Any special storage conditions or conditions of use;
- The name or business name and address of the manufacturer or packager, or of a seller established within the Community;
- The place of origin or provenance if failure to give such particulars might mislead the consumer;
- Instructions for use should be included to enable appropriate use of the foodstuff.

The information should appear in a language that is easily understood by the consumers in the EU Member States in which the products are traded. The mandatory language in Germany is German.

Packaging:

The container should be well filled with the product (including packing medium) which should occupy no less than 90% (minus any necessary head space according to good manufacturing practices) of the water capacity of the container. See the Codex Alimentarius standards for pickled cucumbers for fill and weight requirements.

Marketing requirements for packaging differ between customers and market segments. Therefore, it is crucial that you discuss preferred packaging requirements with your customers. Some general characteristics are:

- *Size*: large size for catering market, medium and small single–serve, portion-size for consumer market. Industrial jarred or canned fruit and vegetables (to be repacked or reused later) are packed in 1 to 5-litre containers. Consumer fruit and vegetables are packed in containers of 50 to 1,000 ml.
- *Material*: glass jars are common. Aluminium cans are used to a much lesser extent. The opportunity to visually examine the products if they are packed in glass increases the value of these products.
- *Innovation*: innovative packaging, such as easy-to-open, new attractive colourful designs, and snack packs (drained products) stimulate new demand.

Processing:

'Water-bath canning' or hot water canning is used for the processing of high-acid foods, such as pickles and pickled food. This method uses a large kettle of boiling water. Filled jars are submerged in the water and heated to an internal temperature of 212 degrees for a specific length of time.

See the Codex Alimentarius standards for pickled cucumbers for the basic ingredients and other permitted ingredient requirements. Please note that the EU has its own regulations for permitted additives as well.

Buyer requirements

Buyer requirements can be divided into (1) *musts*, requirements you must meet in order to enter the market, such as legal requirements, (2) *common* requirements, which are those most of your competitors have already implemented, in other words, the ones you need to comply with in order to keep up with the market, and (3) *niche* market requirements for specific segments.

Legal requirements are a must – food safety and informing consumers correctly

Here you can find requirements you must meet when marketing your products in Germany. Pay attention to the indications of which materials / products are concerned per requirement described.
The following 'musts' apply to canned cucumbers and gherkins and uses listed here:

- Food safety and health control
- Contamination
- Composition
- Labelling
- Food contact materials

Food safety: Traceability, hygiene and control

Food safety is a key issue in EU food legislation, which applies in Germany. The General Food Law is the legislative framework regulation for food safety in the EU. To guarantee food safety and allow appropriate action in cases of unsafe food, food products must be traceable throughout the entire supply chain and risks of contamination must be limited. An important aspect for controlling food safety hazards is defining critical control points (HACCP) by implementing food management principles. Another important aspect is subjecting food products to official controls. Products that are not considered safe will be denied access to the EU, including Germany.

Tip:

- Search in the EU's Rapid Alert System for Food and Feed (RASFF) database to see examples of withdrawals from the market and the reasons behind these withdrawals.
- EU buyers, including German, will often ask buyers to implement a food (safety) management system based on HACCP-principles (see under *Common requirements*).
- Read more about HACCP and health control in the EU Export Helpdesk

Control of food imported to Germany

Controls may apply to imports into the EU, including Germany, and/or to any other stage of the food chain (manufacture, processing, storage, transport, distribution, and trade) and in case of canned cucumbers and gherkins may include a systematic documentary check. In the event of repeated non-compliance, specific products originating from particular countries can only be imported under stricter conditions, e.g. accompanied by 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.

Tips:

- To help you answer key questions about health control refer to the guidance document of the EU.
- Check if there are any increased levels of controls for your product and country. Read more about health control on the EU Export Helpdesk website.
- For information on safe storage and transport of canned fruit and vegetables go to the website of the Transport Information Service.

Avoid contamination to ensure food safety

Contaminants are substances that may be present as a result of the various stages of growing, processing, packaging, transport or storage. The EU has set threshold limits for certain substances that could be present in food products, such as microbiological contamination, contaminants, and residues of pesticides. The different forms of contamination are:

- Heavy metals: there are restrictions for lead, cadmium and tin (see section 3 of Annex of Regulation (EC) No 1881/2006)
- Pesticides: the EU has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed will be withdrawn from the EU market.
- Foreign matter: contamination by foreign matter like plastic and insects are a threat when food safety procedures are not carefully followed.

Tips:

- Check the European Commission's factsheet on food contaminants "Managing food contaminants: how the EU ensures that our food is safe"
- Read more about contaminants in the EU Export Helpdesk
- Irradiation is a way to combat microbiological contamination but this is not allowed by EU legislation for processed fruit and vegetables.
- To find out the MRLs that are relevant for your products, you can use the EU MRLdatabase in which all harmonised MRLs can be found. You can search for your product or pesticide used and the database shows the list of the MRLs associated with your product or pesticide. Read more about MRLs in the EU Export Helpdesk.
- A good way to reduce the amount of pesticides, is applying integrated pest management (IPM) which is an agricultural pest control system that uses complementary strategies including growing practices and chemical management.
- Refer to the Buyer Requirement module on natural colour, thickeners and flavours for more information.
- E-numbers indicate approval by the EU. To obtain an E-number the additive must have been fully evaluated for safety by the competent food safety authorities in the EU (EFCH).
- Read more about legislation on authorised food additives and flavourings under general conditions of preparation of foodstuffs

Product composition

Product can be rejected by buyers and EU customs authorities if they have undeclared, unauthorised or excessive levels of extraneous materials. There is specific legislation for additives (e.g. colours, thickeners) and flavourings that lists which E-numbers and substances are permitted. If you want to add vitamins you will have to know which vitamins (see Annex I) and sources, vitamin formulations and mineral substances are allowed (see Annex II).

Tip:

- In December 2014 EU Regulation 1169/2011 came into effect. This new labelling legislation changed current legislation considerably. For example, allergens have to be highlighted in the list of ingredients and requirements for allergen information also cover non pre-packed foods, including those sold in restaurants and cafés. Read more about the new labelling legislation on the EU website.

Labelling

If you are supplying consumer labelled product, for pickled cucumbers most likely in cans and jars, you will have to take labelling requirements laid down EU Regulation 1169/2011into account. Labels should inform consumers about composition, manufacturer, storage methods and preparation.

Tip:

- Read more about food labelling in the EU Export Helpdesk.

Nutrition and health claims

Nutrition and health claims suggest or indicate that a food has a beneficial characteristic. They cannot be misleading. Therefore, only EU approved nutrition and health claims can be made. If new nutrition or health claims are made these have to be approved in advance by the European Food Safety Agency (EFSA).

Tip:

- For more information about nutrition and health claims refer to the website of the EU.

Allergens

Pre-packed products that contain allergens have to be labelled in such a way that it is clear to consumers that they contain allergens. Pickled cucumbers and gherkins are not on the EU allergens list, but when exporting composed products this may apply to the additives.

Tip:

- The EU legislation on food contact materials is quite extensive and it is not easy to prove to your EU importer that your product complies with all requirements. EU importers of food products will require documentation on toxicology and risk assessment of chemical migration from food contact materials and/or declarations of compliance.

Food contact materials

Specific health control provisions apply to consumer packaging materials that come into contact with food (e.g. cans, jars). Food contact materials must be manufactured so that they do not transfer their constituents to food in quantities that could endanger human health, change the composition of the food in an unacceptable way or impact upon the taste and odour of foodstuffs. Tin present in cans has been known to leach into the food. This has been particularly shown to occur in the case of acidic foodstuffs. For canned foods, EU regulations set out a maximum level of tin that can be found in food (see regulations on contamination).

Full overview of requirements for pickled cucumbers and gherkins:

For a list of requirements consult the EU Export Helpdesk where you can select your specific product code (code for pickled cucumbers and gherkins is 200110.

Common requirements: food safety management is crucial, addressing sustainability is gaining ground

Food Safety Certification as a guarantee

As food safety is a top priority in all EU food sectors, including Germany, you can expect many players to request extra guarantees from you in the form of certification. Many EU buyers (e.g. traders, food processors, retailers) require the implementation of a (HACCP-based) food safety management system. The most important food safety management systems in Germany are BRC, IFS, FSSC22000 and SQF. All the aforementioned management systems are recognised by the Global Food Safety Initiative (GFSI), which means that they should be accepted by major retailers. However, in practice some buyers still have preferences for one specific management system. GLOBAL G.A.P. is a minimum requirement demanded by EU/German retail for fresh fruit and vegetables and is recommended for fruit and vegetables for canning.

Tips:

- German market entry preparation is likely to include implementing a food safety management system and it is therefore important to familiarise yourself with them.
- If you plan to target one or more markets, check which specific food safety management systems are most commonly requested. In any case choose a management system that is GFSI approved.
- Read more on the different Food Safety Management Systems in the Standards Map.

Corporate responsibility

German buyers (especially large ones in western and northern EU countries) are paying increasing attention to their corporate responsibilities regarding the social and environmental impact of their business. This also affects you as a supplier. Common requirements include the signing of a suppliers' code of conduct which states that you conduct business in a responsible way, i.e. you (and your suppliers) respect local environmental and labour laws, avoid corruption etc. Furthermore, importers may also participate in initiatives such as the Ethical Trading Initiative or the Business Social Compliance Initiative. These initiatives focus on improving social conditions in their members' supply chains. This implies that you, as a supplier, are also required to act in line with these principles.

Tips:

- When targeting other German markets it might be interesting to assess your company's current performance by conducting a self-assessment, which you can find on the BSCI website.
- Be aware that many of the environmental and social sustainability issues take place at farm level. To test to what extent your farmers are sustainable you could ask them to fill in the Farmer Self Assessment by the Sustainable Agriculture Initiative.
- Implementing a management system such as ISO14000 (environmental aspects), OHSAS 18001 (occupational health and safety) or SA 8000 (social conditions) is a way to address sustainability and possibly gain a competitive advantage. Research with your buyer whether this will be appreciated.

Niche requirements: a growing market for certified products

Organic, niche market

Organic pickled cucumbers and gherkins are produced and processed by natural techniques. Germany is the largest EU market for Organic products. In general, although growing, the organic market is still relatively small. To market canned fruit and vegetables in Germany as organic, they must be grown using organic production methods which are laid down in EU legislation, and growing and processing facilities must be audited by an accredited certifier. Only then may you may put the EU organic logo on your product. Although there is an EU-wide system for the regulation of organic farming, well-established national and private logos can continue to be used on product labels. For example, companies and operators located outside Germany who wish to market organic products in Germany may consider using the Naturland mark.

Tips:

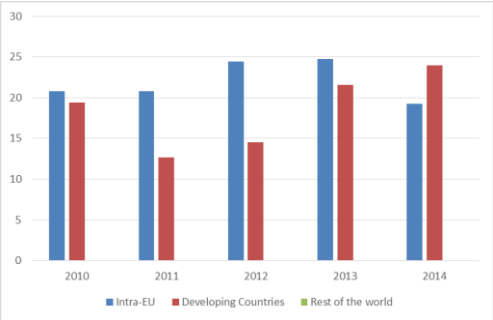
- Implementing organic production and becoming certified can be expensive. In the current market the return on investment may not be high. On the other hand it can increase yields and improve quality.
- Check the Soil Association standard for Food and drink to get an idea of the requirements of organic production.
- Consult the Standards Map for the different organic labels and standards.

Trade and macro-economic statistics

General information and figures about production and trade developments in the EU and German market are provided in the CBI Tradewatch. This section provides you with more detailed statistics concerning the trade and consumption of pickled cucumbers and gherkins in Germany.

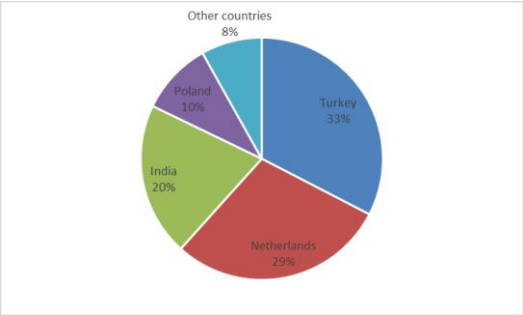
Trade: imports and exports

Figure 1: Imports of pickled cucumbers and gherkins in Germany, 2010-2014, in thousand tonnes



Data source: Eurostat Comext

Figure 2: Breakdown of import volume of pickled cucumbers and gherkins in Germany, by country of origin in 2014



Data source:

Figure 3: German import growth in value of pickled cucumbers and gherkins in the range of 20 largest suppliers, 2010-2014

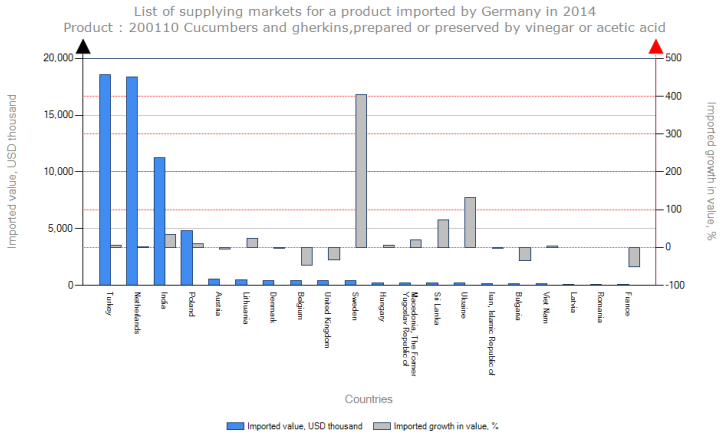
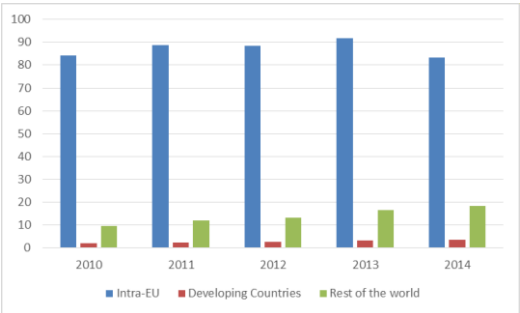
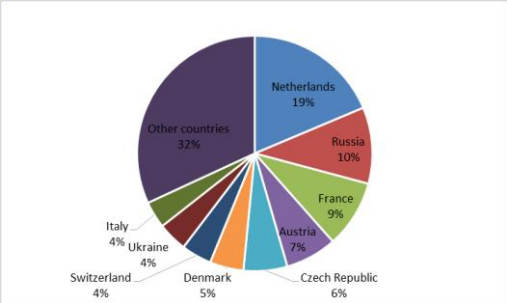


Figure 4: Exports of pickled cucumbers and gherkins in Germany, 2010-2014, in thousand tonnes



Data source: Eurostat

Figure 5: Breakdown of export volume of pickled cucumbers and gherkins in Germany, by country of destination, in 2014



Data source: Eurostat

Analysis and interpretation

Germany is a net exporter of pickled cucumbers and gherkins, and exports are significantly higher than imports.

Tip:

- The Netherlands is an entry port for imports that are re-exported to Germany and other EU countries. You can look for a wholesale partner in the Netherlands to carry out the re-export function.

Over the last five years total imports of pickled cucumbers and gherkins in Germany grew slightly by 1% in value and 1.8% in volume, reaching €43 million and 43,000 tonnes. However, growth of imports from DCs was stronger at 7.7% in value and 5.3% in quantity.

Tip:

- Learn from DC countries that are gaining market share on the German market.

The German import market for pickled cucumbers and gherkins is highly concentrated and the three largest suppliers (Turkey, the Netherlands and India) account for 82% of total imports. Over the last five years Turkey has slightly lost market share (by 2%), but imports from the Netherlands and India increased by 11% and 29% respectively.

Other suppliers that increased their exports of pickled cucumbers and gherkins into Germany over the last five years were Ukraine (170% growth in quantity) and Sweden (222%).

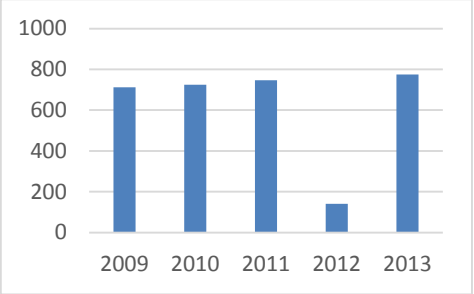
German exports of pickled cucumbers and gherkins are increasing in volume outside the EU but exports to other EU member countries are falling slightly. In the range of the largest German export destinations, the highest growth in exports over the last five years was to the Russian Federation (41%) and Romania (30%).

Tip:

- Consider the upcoming consuming countries, such as the Russian Federation, that are increasingly served by German exports.

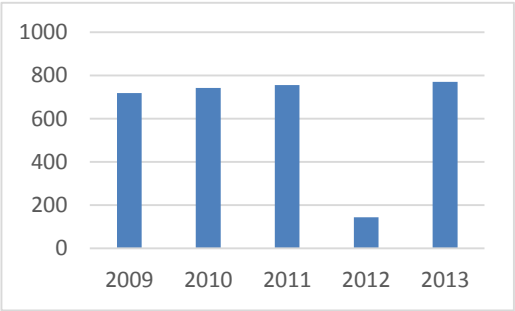
Production

Figure 6: Production of pickled fruits and vegetables, including pickled cucumbersa) (excluding sauerkraut), in Germany, 2009-2013b), in € million



a) The data are only available at this aggregation level (PRODCOM Rev. 2 NACE code 10391800). No data available for pickled cucumbers and gherkins only (PRODCOM Rev. 2 NACE code 10391800)
b) Latest data available
Data source: PRODCOM/Eurostat

Figure 7: Apparent consumption a) of pickled fruits and vegetables, including pickled cucumbersb) (excluding sauerkraut), in Germany, 2009-2013, in € million



a) The data are only available at this aggregation level (PRODCOM Rev. 2 NACE code 10391800). No data available for pickled cucumbers and gherkins only (PRODCOM Rev. 2 NACE code 10391800)
b) Latest data available
Data source: PRODCOM/Eurostat

Analysis and interpretation

Germany is the largest producer of pickled fruit and vegetables in the EU. Other large producers are Italy and the UK

Pickled cucumbers, gherkins, and sauerkraut dominate the pickled vegetables market in Germany. The production volume has been rising slightly between 2010 and 2011, had strong decrease in 2010 and again return to previous level in 2013.

Carl Kühne KG (GmbH & Co.) leads the German market of pickled products and has an 18% share of the German pickled cucumber market. Other large German manufacturers of pickled cucumbers and gherkins are Rich. Hengstenberg GmbH & Co. KG, Obst- und Gemüseverarbeitung Spreewaldkonserve Golszen GmbH, Develey Senf & Feinkost GmbH.

Tip:

- The German pickled cucumber and gherkin market is highly competitive. Pickled fruit and vegetables are produced within Germany on a large scale, but the costs of production are rising. Explore the potential of low price supply.

Consumption

Analysis and interpretation

Apparent consumption of pickled fruits and vegetables in Germany for 2013 was around €770 million.

There are varieties of pickled fruits and vegetables, including pickled cucumbers and gherkins, with different characterising flavours on the German market.

Pickled cucumbers, gherkins, and sauerkraut are the most popular pickled vegetables in Germany. These vegetables are widely used, mostly in cold dishes.

Mustard gherkins (Senfgurke), gherkins or dill pickles (Gewürzgurke), pickled cucumbers (Salzgurke) and honey gherkins (Honiggurke) are the most popular taste varieties. Senfgurke, Gewürzgurke, and Salzgurke are perceived as mainstream. Senfgurke are packed with bright mustard seeds in vinegar, sugar, salt, and spices such as onions, horseradish, bay leaf, and dill. Gewürzgurke are spiced with dill, yellow mustard seeds, onion, salt, sugar, and flavourings such as pepper. Salzgurke are spiced with dill, horseradish, and garlic. Pepper, allspice, laurel, vine leaves or cherry leaves and basil can be added to salzgurken packing. Honiggurke are spiced with a mixture of honey, mustard seeds, and ginger.

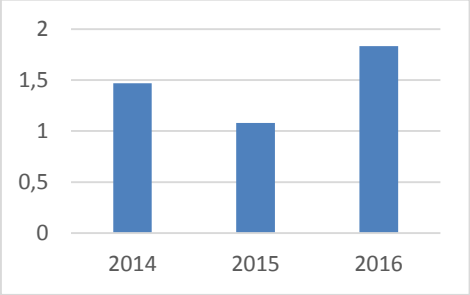
The average vegetable (including pulses and nuts) intake in Europe is 220 g per day. The mean fruit intake is 166 g per day, implying that the average consumption of fruit and vegetables (including canned) is 386 g per day per person. The mean fruit and vegetable intake per person per day in Germany is 442 g per day per person. Germany has met the recommendation of consuming ≥400 g of fruit and vegetables per day (Source EUFIC, 2012).

Tips:

- Explore the possibilities of exporting niche market varieties of pickled cucumbers and gherkins, like different cuts and packaging.
- Explore niche markets for pickled cucumbers and gherkins with taste characteristics than that differ from Senfgurke, Gewürzgurke, Salzgurke, and Honiggurke. You can do this by visiting your targeted export market, conducting additional consumer market research about (changing) taste preferences, appointing an agent or visiting existing clients.

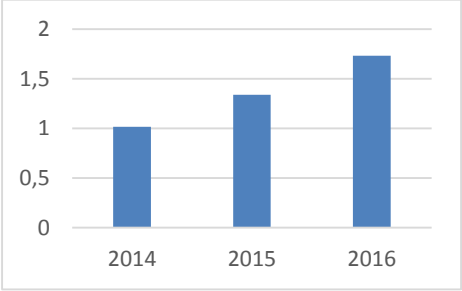
Macro-economic statistics

Figure 8: Real GDP in Germany, 2014-2016, % change from previous year



Source: OECD Economic Outlook 96 database.

Figure 9: Real private consumption expenditure in Germany, 2014-2016, % change from previous year



Source: OECD Economic Outlook 96 database.

Analysis and interpretation

The German population is expected to grow at a relatively slow rate from 81.1 million in 2014 to 81.9 million in 2020.

The total volume of imports in Germany is expected to increase by 5.8% until 2020, which means that it is likely that imports of pickled cucumbers and gherkins will continue.

Between 2014 and 2016, German private consumption expenditure will continue to grow at an increasing pace. However, as traditional products in a mature market, pickled cucumbers and gherkins will most likely not be affected much by the economic trend. Food and beverage markets in general will grow less than the economy on the whole.

Tips:

- Consider exporting to Germany, as it is one of the larger markets in the EU in terms of population, with high consumption of pickled vegetables.
- The disposable income in Germany is relatively high, indicating opportunities for selling pickled cucumbers and gherkins.

Market trends

CBI Trend Mapping provides you with general trends in the European market for processed fruit and vegetables. This section provides more detail about specific trends in the markets for pickled cucumbers and gherkins in Germany.

Analysis and interpretation

Social trends

Convenience is highly appreciated in Germany, since households have become smaller. Jarred or canned pickled cucumbers and gherkins are convenient to consume. Jarred or canned pickled cucumbers and gherkins are also used by the food processing industry as an ingredient. Both consumers and the industry appreciate jarred or canned food, as it is easy to store.

Tip:

- Get information from your contact person in Germany about the cutting and packaging requirements of sales channels to consumers.

More consumers are becoming eco-aware and require organic, pesticide-free or ecologically responsible products.

Tip:

- Consider certifying and labelling your products as Organic. See the background, assessment, and interpretation document for Regulation (EC) No 834/2007 for Organic Food and Farming for more information about requirements. Check the International Trade Center Standards Map for a comparative analysis and review of voluntary standards.

Spreewald gherkins (German: Spreewälder Gurken or Spreewaldgurken) are a speciality gherkin from Brandenburg, which are protected by the EU as a Protected Geographical Indication (PGI). Spreewald gherkins originate from the former DDR and gained renewed interest from the public after the release of a popular German movie in which the gherkins were explicitly mentioned. Spreewald gherkins have a price premium of 25% above conventional gherkins due to speciality (Source: Petschick 2006).

Mustard gherkins (Senfgurke), gherkins or dill pickles (Gewürzgurke) or pickled cucumbers (Salzgurke) are the most popular taste varieties.

Companies like Carl Kühne KG (GmbH & Co.) have been introducing pickled gherkins in changing combinations of taste characteristics (mild, hot, herbal) in more colourful and modern packaging. Companies have also been launching lines of organic gherkins.

Tip:

- Get information from your contact person in Germany about quality standards, delivery schedules and logistics requirements. Evaluate whether working capital, processing technology, logistics and the level skills of employees at your company is able to keep up with these requirements.

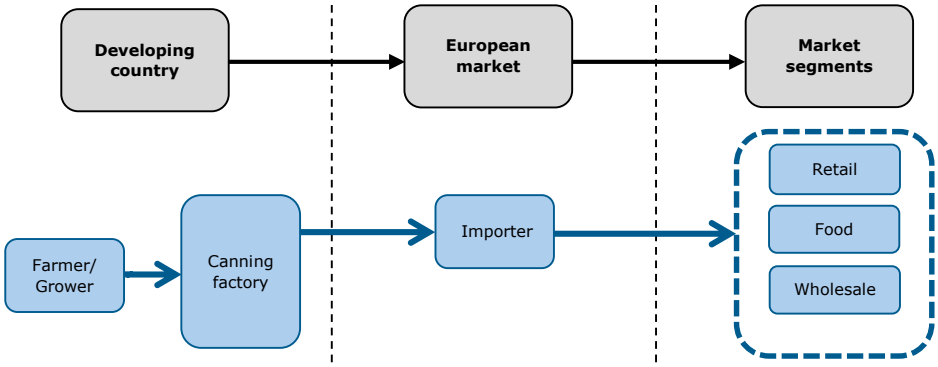
Economic trends

Supermarkets demand good quality and have strict delivery schedules, as they want their shelves to be filled throughout the year. Supermarket chains use their own name on cans as a brand for middle market segments (private labelling).

Market Channels and Segments

For more general information about market channels and segments, you can have a look at the CBI Market Channels and Segments document for processed fruit and vegetables available on the CBI market intelligence platform. This section provides some information about the marketing channels through which pickled cucumbers and gherkins are marketed in Germany.

Market channel for EU and EFTA products: end products finished and packed at origin such as canned or jarred pickled cucumbers and gherkins.



Analysis and interpretation

In the canned industry supply chain, the importer sells end products directly to the different segments. Moreover, many multiple retailers import directly from the producers. Therefore, producers and retailers play an important role in the distribution of goods in the EU.

At the same time, the retail power is increasing in the area of private labels as the private label is no longer related to 'lower quality'. In 2009, the percentage of private labels in Germany was 40% (Source: Bunte et al. 2011)

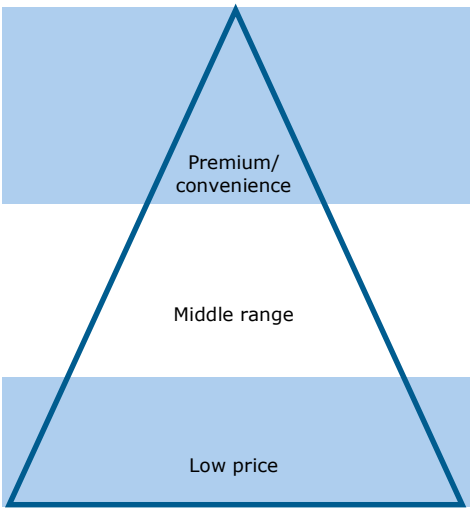
A retailer takes care of the marketing, but engages producers to supply products manufactured in accordance with the retailer requirements. Retailers look for manufacturers that are able to supply at the cheapest price given the retailer's product and delivery requirements.

Manufacturers of branded products generally own factories where these products are manufactured. A recent development is that brand owners outsource production to cheaper third-party production plants that are able to produce at lower costs, for example private label suppliers that are already operational. In this case, the marketing and production are split between different companies.

Tips:

- For the canned or jarred pickled cucumbers and gherkins markets you can focus on the retail, wholesale and foodservice as your end users or customers.
- Obtain greater market power within the chain by building long-term relationships (and signing contracts) with large renowned buyers in the European market.
- Keep an eye on the dynamics between the brands and private labels in order to identify potential growth markets. Read published reports on private labels for general insights. Visit export markets you are targeting and conduct additional market research on specific EU countries for more information about private labelling in relation to specific products.

Figure 8: Indication of price ranges and market segments



Premium/ convenience	For example, organic pickled cucumbers and gherkins	High quality class and additional quality standards from processing industry filling consumer packaging Price range: € 4.25 – € 8.00 per kg. Main sales channels ingredients: Importer or primary processor Main sales channel end products: Retail
Middle range	For example, pickled cucumbers and gherkins for immediate consumption	High quality class and standard retail requirements from processing industry filling consumer packaging Price range: € 1.00 - € 3.50 per kg Main sales channels ingredients: Importer or primary processor Main sales channel end products: Retail
Low price	For example, bulk products for industry	Good quality Price range: € 0.35– € 0.80 per kg Main sales channels ingredients: Importer or primary processor Main sales channel end products: Retail

Analysis and interpretation

Low price bulk pickled cucumbers and gherkins are sold at high volumes and relatively low margins. Taste characteristics are perceived as mainstream by consumers and are often sold in the cheapest segment, via discount brands (for example Euro Shopper) and private labels. Alongside retail, low price bulk pickled cucumbers and gherkins are widely traded in the industrial markets, such as food services, for further processing. The products do not possess value-added features such as innovative packaging.

Tip:

- Consider whether it might suffice to use the quality standards of the importer for sales to the retail or processing industry.

Mid-range pickled cucumbers and gherkins are subject to higher category and standard retail requirements. Mid-range pickled cucumbers and gherkins are sold at lower volumes than bulk. Some varieties of pickled cucumbers and gherkins are not considered mainstream, like Honiggurken, but are still relatively easily to purchase. These pickled cucumbers and gherkins are commonly sold under manufacturers' brands or private labels. They have some value-added characteristics, such as innovative packaging, which enables higher margins to be achieved.

Tip:

- Consider creating some value-added characteristics, such as innovative packaging, to obtain higher margins in negotiations with your buyers.

Premium pickled cucumbers and gherkins are of the highest quality, have the highest standards and have additional non-conventional characteristics, e.g. organic, CSR or Fair Trade; ethnic/exotic taste characteristics; regional specialities and innovative packaging and/or non-conventional cuts. These characteristics enable relatively high margins to be achieved for these products. These pickled cucumbers and gherkins are commonly sold under manufacturers' brands.

Tip:

- Consider creating some value-added aspects or non-conventional characteristics, such as organic, CSR or Fair Trade, ethnic/exotic taste characteristics, regional specialties, innovative packaging and non-conventional cuts, to obtain higher margins in negotiations with your buyers.

Market competitiveness

For more general information about market competitiveness for processed fruit and vegetables, you can look at the Market Competitiveness document and Top 10 Tips for doing business with European Buyers. available on the CBI market intelligence platform.

Useful Sources

Export and market entry support:
http://www.cbi.eu/
http://www.cbi.eu/marketintel_platform/Processed-Fruit-and-Vegetables-and-Edible-Nuts/177430

Certification schemes:
http://www.sa-intl.org/
http://www.iso.org/iso/home.htm
http://www.standardsmap.org/identify.aspx
http://www.unece.org/trade/agr/standard/fresh/FFV-StandardsE.html
http://www.codexalimentarius.org/codex-home/en/

Statistics and sector information:
http://faostat3.fao.org/home/E
http://ec.europa.eu/eurostat
http://comtrade.un.org/

CBI Market Intelligence

P.O. Box 93144
2509 AC The Hague
The Netherlands

www.cbi.eu/market-information

marketintel@cbi.eu

This survey was compiled for CBI by Globally Cool
in collaboration with CBI sector expert Freek Jan Koekoek

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