



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 button mushrooms (of the genus *Agaricus*) is a product group with 1% import share, the volumes is still 200 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 2020, in € million	Import value from developing countries 2020, in € million	Import share from developing countries 2020	Average annual import growth rate in value 2016–2020	Annual growth rate of imports from developing countries 2016–2020
Shelled almonds	2,335	17	0.7%	-0.4%	3.1%
Mixtures of nuts and other seeds	1,832	637	34.8%	2.9%	-0.6%
Frozen vegetables	1,450	232	16.0%	0.8%	0.7%
Shelled cashews	1,323	905	68.4%	2.9%	4.8%
Shelled hazelnuts	1,262	825	65.4%	-0.8%	-1.8%
Orange juice with Brix below 20	1,202	347	28.8%	0.5%	-0.8%
Canned vegetables	1,076	203	18.8%	5.0%	4.3%
Concentrated orange juice	1,054	606	57.5%	-7.0%	-6.0%
Canned fruit (mainly tropical)	1,024	349	34.1%	3.7%	2.4%
Shelled groundnuts	1,001	696	69.5%	5.0%	7.2%
Fruit jams, jellies, marmalades, purées or pastes	949	156	16.4%	1.6%	1.6%
In-shell pistachios	870	106	12.2%	4.2%	-9.9%
Tropical and other fruit juices	850	226	26.6%	1.1%	0.9%
Shelled walnuts	784	144	18.3%	7.2%	10.0%
Table olives	754	189	25.0%	5.8%	5.3%
Mixtures of fruit juices	703	5	0.7%	7.0%	-4.8%
Frozen berries	654	259	39.5%	0.0%	2.2%
Canned tomatoes	612	27	4.5%	4.3%	-1.1%
Dried vegetables	603	175	29.0%	-0.4%	-4.7%
Pine nuts, pecans and other nuts	559	202	36.1%	5.1%	4.3%
Canned groundnuts	539	23	4.2%	6.4%	14.9%
Prepared vegetables, frozen	533	13	2.4%	5.5%	20.4%
Dried grapes	528	338	64.0%	-1.0%	0.0%
Pickled vegetables and fruits	526	184	35.0%	4.3%	5.4%
Concentrated apple juice	525	154	29.3%	-2.0%	5.5%



Product	Total import value 2020, in € million	Import value from developing countries 2020, in € million	Import share from developing countries 2020	Average annual import growth rate in value 2016–2020	Annual growth rate of imports from developing countries 2016–2020
Frozen strawberries	513	197	38.4%	6.2%	15.8%
Table dates	395	202	51.2%	9.8%	10.5%
Canned sweetcorn	390	14	3.7%	4.2%	-0.6%
Frozen mixtures of vegetables	369	4	1.0%	2.2%	5.2%
Frozen orange juice	355	83	23.4%	-3.4%	7.1%
Pickled cucumbers and gherkins	329	135	41.0%	8.6%	12.0%
Canned pineapples	328	235	71.5%	-4.4%	-5.8%
Canned or preserved button mushrooms	326	6	1.9%	5.8%	-10.3%

Source: Trade Map

When analysing the table above, the most promising products for exporters from developing countries are cashew nuts, peanuts, canned and preserved tropical fruit, tropical fruit juices and purees, table olives and frozen 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 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).

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: shelled walnuts, in-shell pistachios, table dates, pine nuts and pickled cucumbers, and gherkins.

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 2020, in € million	Import value from developing countries 2020, in € million	Import share from developing countries 2020	Total annual import growth rate 2016–2020 in value	Annual import growth rate from developing countries 2016–2020
Canned fruit and nuts mixtures	293	30	10.1%	0.8%	1.3%
Shelled pistachios	284	120	42.3%	1.9%	1.7%
Apple juice	274	1	0.5%	3.9%	-11.2%
Concentrated single citrus fruit juice	254	102	40.0%	-4.3%	-6.9%
Dried (infused) cranberries)	243	0	0.1%	9.4%	-4.8%
Canned beans	227	9	3.8%	8.1%	13.5%
Dried peaches, pears, papaws "papayas", tamarinds and other edible fruits	215	75	34.7%	-0.1%	-2.4%
Homogenised preparations of jams, fruit or nut purées and nut paste	211	3	1.5%	3.8%	-13.8%
Frozen green beans	209	10	4.6%	-0.8%	-5.5%
Canned asparagus	208	172	82.9%	-3.7%	-3.9%
Walnuts in shell	202	8	3.9%	-5.0%	11.3%
Mixtures of nuts or dried fruits	197	4	2.1%	2.1%	-0.3%
Canned peaches	196	6	2.9%	-1.2%	-10.2%
Frozen potatoes	180	0	0.2%	3.0%	18.8%



Product	Total imported value 2020, in € million	Import value from developing countries 2020, in € million	Import share from developing countries 2020	Total annual import growth rate 2016–2020 in value	Annual import growth rate from developing countries 2016–2020
Dried prunes	179	15	8.5%	-2.7%	-7.1%
Dessicated coconuts	179	111	62.3%	-1.9%	-4.5%
Canned strawberries	176	10	5.8%	1.2%	6.1%
Concentrated pineapple juice	162	98	60.4%	-15.6%	-16.4%
Single citrus fruit juice	158	5	3.2%	8.4%	2.7%
Shelled macadamia nuts	158	83	52.3%	5.0%	7.9%
Frozen beans	156	8	5.2%	0.7%	6.5%

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. Shelled pistachios – Iran, Turkey, Syria and Afghanistan;
2. Walnuts in shell – Chile, Argentina, Ukraine, Tunisia, Moldova, South Africa;
3. Canned and preserved beans – Kenya, Lebanon, China, Turkey, Mexico, India and Jordan;
4. Shelled macadamia nuts – South Africa, Kenya, Malawi, Guatemala, Mauritius.

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 2020, in € million	Import value from developing countries 2020, in € million	Import share from developing countries 2020	Total annual import growth rate 2016–2020 in value	Annual import growth rate from developing countries 2016–2020
Frozen spinach	125	1	1.1%	1.9%	30.6%
Fruit and nut flour, meal and powder	123	23	18.5%	-0.9%	0.6%
Chestnuts in shell	121	23	18.7%	-3.7%	-5.8%
Dried apricots	115	92	79.4%	-3.1%	-4.2%
Dried mushrooms	106	50	47.2%	-3.1%	-1.9%
Candied fruit and vegetables	104	19	18.7%	0.8%	-3.1%
Grape juice	102	0	0.2%	1.9%	-28.3%
Concentrated grape juice	101	4	3.7%	0.0%	9.3%
Frozen sweetcorn	96	13	13.5%	0.7%	8.6%
Canned and prepared apricots	82	13	16.0%	-4.5%	-14.4%
Cranberry juice	78	0	0.3%	-3.6%	-16.7%
Dried apple	77	21	27.5%	-0.2%	1.6%
Grape juice	75	10	13.5%	-4.0%	12.4%
Canned and preserved pears	72	19	25.9%	-4.0%	2.1%
Concentrated grape juice	67	25	37.3%	0.1%	5.7%
Almonds in shell	64	1	2.1%	11.3%	-12.4%
Retail packed baby food	42	1	2.9%	4.4%	-13.8%
Frozen beans	39	9	22.9%	3.6%	3.5%
Citrus fruit jams, jellies, marmalades, purées or pastes	38	2	4.2%	1.2%	1.5%
Canned and preserved palm hearts	35	29	84.6%	-2.8%	-2.1%



Product	Total imported value 2020, in € million	Import value from developing countries 2020, in € million	Import share from developing countries 2020	Total annual import growth rate 2016–2020 in value	Annual import growth rate from developing countries 2016–2020
Shelled chestnuts	34	2	6.7%	-2.5%	12.7%
Hazelnuts in shell	34	5	13.5%	2.6%	44.4%
Canned and preserved bamboo shoots	29	18	60.4%	-1.8%	-1.6%

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.

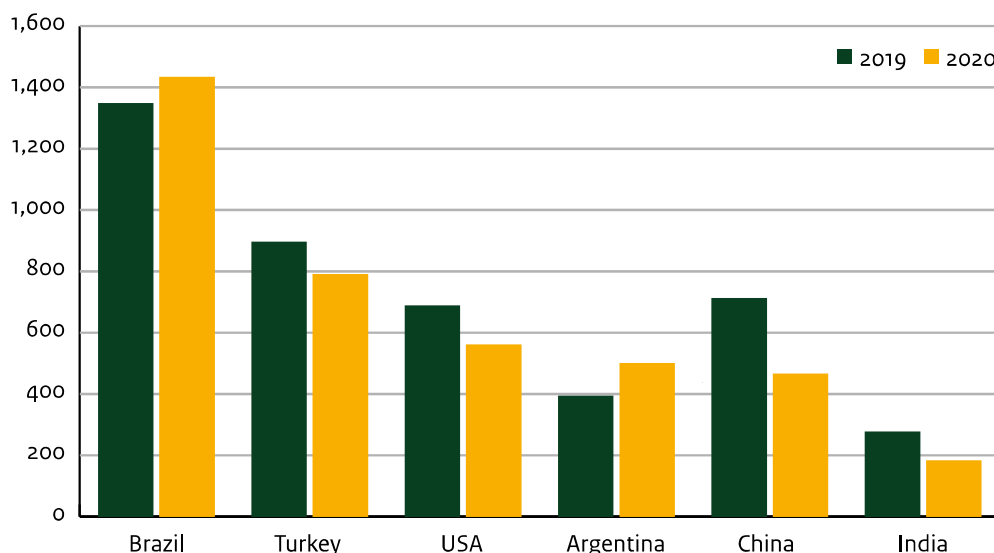
In the group of products with an import share lower than 0.5% (see table 3), the following products contributed the most to the growth in imports from developing countries (the leading developing countries of origin for each product group are also indicated):

1. Canned and preserved cherries – Serbia, Turkey, North Macedonia, China, Moldova, Armenia;
2. Canned and preserved citrus fruit – China, Turkey, Peru, Costa Rica, Morocco, Swaziland;
1. In-shell groundnuts – Egypt, China, Togo, Argentina, Cameroon and India;
2. Canned peas – Egypt, China, Turkey, Moldova;
3. Frozen sweetcorn – Serbia, Vietnam, Peru, Moldova, China and India;
4. Grape juice – Brazil, Moldova, Turkey, South Africa, Ukraine;
5. Shelled chestnuts – China, Chile, Albania, Turkey;

Leading suppliers of processed fruit and vegetables to Europe

Brazil is the leading supplier of processed fruit and vegetables to Europe in terms of volume, mostly because of its orange juice exports. Turkey comes second, as the leading European supplier of hazelnuts, hazelnut paste, dried grapes and dried apricots. The United States is Europe's third supplier thanks to the high value of exported nuts such as almonds, pistachios and walnuts. Argentina is ranked fourth with peanuts and lemon juice as top exported products. China holds the fifth position with tomato puree and frozen vegetables as the leading products. India is the leading European supplier of mango puree and strong exporter of pickled cucumbers/gherkins.

Figure 1. Leading external suppliers of processed fruit and vegetables to EU27, in thousand tonnes



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, 2020

Product group	Top 5 developing country suppliers to Europe	Top products per product group
Canned and preserved fruit and vegetables	China/Turkey Thailand India Turkey Morocco China/Peru Tunisia/Morocco	Canned tomato products Canned pineapples Pickled cucumbers and gherkins Pickled vegetables Table olives Canned asparagus Olive Oil
Dried fruit and vegetables	Turkey Tunisia/Algeria China Philippines/Indonesia Turkey South Africa Burkina Faso/Thailand/Ecuador China/Serbia/Bosnia	Dried grapes Dates Dried vegetables Desiccated coconuts Dried apricots Dried peaches Dried tropical fruit Dried mushrooms
Frozen fruit and vegetables	Egypt China Serbia China/Kenya Turkey	Frozen strawberries Frozen vegetables Frozen raspberries Frozen peas and beans Frozen sweetcorn
Fruit and vegetable juices	Brazil Costa Rica China Turkey Serbia/Turkey Argentina Philippines	Orange juice Pineapple juice Apple juice Pomegranate juice Sour cherry juice Lemon juice Coconut water
Jams, pastes and purees	Turkey Serbia/Mexico Chile Serbia India	Hazelnut paste Berry purees Apple puree Plum puree Mango puree
Edible nuts	Argentina/Nicaragua Vietnam/India Turkey/Georgia Chile/Moldova Iran China/Russia South Africa/Kenya	Groundnuts (peanuts) Cashew nuts Hazelnuts Walnuts Pistachios Pine nuts Macadamia nuts

Source: Eurostat COMEXT, TradeMap and industry sources