



CBI  
*Ministry of Foreign Affairs*

# **CBI Product Factsheet:**

# **Fresh Exotic Tropical Fruit in Europe**

## Introduction

Fresh exotic tropical fruits are mostly grown in developing countries and are still considered niche products in Europe. Prices are generally high, often due to low volumes and necessary air transport. Communicating the health benefits of tropical fruit can help increase demand. Purple passion fruit is a tropical fruit that is becoming more popular.

## Product description

This product factsheet covers a number of exotic tropical fruits, mainly tamarinds, cashew apples, lychees, jackfruit, sapodillo plums, passion fruit, carambola and pitahaya.

## Product Definition

Lychee (*Litchi chinensis*) is an evergreen tree which can grow up to 28 metres high. The fruit is up to 5 cm long and 4 cm wide. The white flesh is edible; the pink-red skin is inedible.

Pitahaya (Hylocereus) is a fruit growing on a cactus plant. Three varieties are grown commercially: Hylocereus undatus white flesh with pink-red skin, Hylocereus polyrhizus red flesh with pink-red skin, and Selenicereus megalanthus white flesh with yellow skin. It is also known as pitaya, dragon fruit or cactus fruit.

Passion fruit (*Passiflora edulis*) is a fruit from passion flowers. There are several different species which differ in shape and colour. Passion fruit is also known as purple granadilla in South Africa. In South America the yellow variety maracuyá can be found.

Carambola (*Averrhoa carambola*) is also known as starfruit, named after the star-shape form of the cross-section. The fruit is green to dark yellow and can be up to 15cm long.

Rambutan (*Nephelium lappaceum*) is a tree which bears fruit. The fruit is a round to oval 3–6 cm tall and 3–4 cm wide. The skin is reddish and covered with fleshy pliable spines. The fruit is fragile and is ripened on the tree. The fresh fruit bruise easily and have limited shelf life.

The cashew apple (*Anacardium occidentale*) is a tree which can reach heights of 15 metres. The fruit is an accessory fruit or false fruit. The apple is pear-shaped and yellow and red when ripe. The fruit is perishable and has a fragile skin which makes transportation difficult.

All fruits described above can be grown in tropical or subtropical climates. They are considered exotic to European countries in the sense that they are not produced in Europe and consumption volumes are limited making it niche products. The range of products in this product category is not limited to the ones listed below; other exotic (sub)tropical fruits include mangosteen, kaki fruit, cherimoya, durian, physalis, longan, and many others. These other fruits are not included in the trade statistics of this product factsheet, but most other information applies to these fruits as well.

**Table 1: Combined Nomenclature (CN) commodity code for fresh tropical fruit**

<b>08109020</b>	Fresh tamarinds, cashew apples, lychees, jackfruit, sapodillo plums, passion fruit, carambola and pitahaya
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Source: Eurostat Comext.

**Table 2: FAOSTAT commodity code for production statistics of fresh tropical fruit**

<b>0804.50_b</b>	<b>Fruit, tropical fresh nes</b> Including inter alia: breadfruit ( <i>Artocarpus incisa</i> ); carambola ( <i>Averrhoa carambola</i> ); cherimoya, custard apple ( <i>Annona</i> spp.); durian ( <i>Durio zibethinus</i> ); feijoa ( <i>Feijoa sellowiana</i> ); guava ( <i>Psidium guajava</i> ); hog plum, mombin ( <i>Spondias</i> spp.); jackfruit ( <i>Artocarpus integrifolia</i> ); longan ( <i>nephelium longan</i> ); mamee ( <i>Mammea americana</i> ); mangosteen ( <i>Garcinia mangostana</i> ); naranjillo ( <i>Solanum quitoense</i> ); passion fruit ( <i>Passiflora edulis</i> ); rambutan ( <i>nephelium lappaceum</i> ); sapote, mamey colorado ( <i>Calocarpum mammosum</i> ); sapodilla ( <i>Achras sapota</i> ); star apple, cainito ( <i>Chrysophyllum</i> spp.). Other tropical fresh fruit that are not identified separately because of their minor relevance at the international level. In some countries mangoes, avocados, pineapples, dates and papayas are also reported under this general category.
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Source: Statistics division of the Food and Agriculture Organisation (FAOSTAT)

## Product Specification

### Quality:

- All exotic tropical fruits in this factsheet are classified in three classes: Extra Class, Class I and Class II. Information on quality requirements for each class can be found in the [Codex Alimentarius](#) ('Food code' of the World Health Organisation (WHO) and the Food and Agriculture Organisation (FAO)), the [UNECE standards](#), and in the [General](#)

[Marketing Standards of Regulation \(EU\) 543/2011](#). Most quality requirements are the same for the different fruits. The product should, at the very least be intact, clean and sound, (practically) free from pests, damage, free from bruising, fresh in appearance and in a condition to withstand transport and handling. There are additional requirements for some fruits (see [Codex](#)).

- EU quality standards in [Regulation \(EC\) No. 1580/2007](#) explain that imports of fresh fruit and vegetables from third countries must comply with marketing or equivalent standards. Checks on conformity must be carried out before these goods enter Community customs territory, except in the case of small lots which the inspection authorities/bodies consider to be low risk. In certain third countries which provide satisfactory guarantees of conformity, pre-export checks may be carried out by the inspection bodies of these third countries.

### Size and packaging:

- Size classes are different for the various tropical fruits. See Codex Alimentarius Standard for [lychee](#) , [carambola](#), [mangosteen](#), [rambutan](#) for details.
  - Packaging requirements differ between customers and market segments. They must at least be packed to protect the produce properly, in new, clean and quality packaging to prevent damage to the product. Discuss your customers' packaging requirements with them. In general, wholesale packaging exists of cardboard boxes or crates that can vary in size.
- See also the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits and Vegetables \(CAC/RCP 44-1995\)](#).

### Labelling:

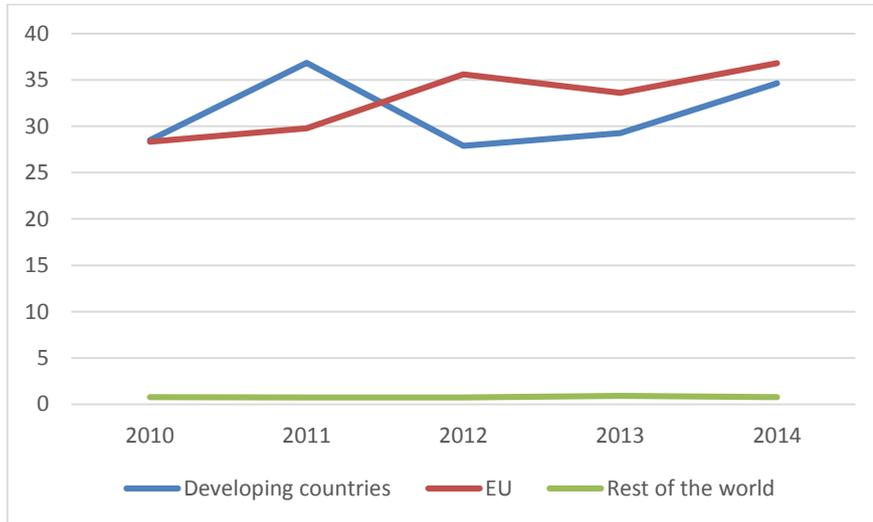
- Consumer package labelling must be in accordance with the rules and regulations applying in the EU and EFTA market. Labels cannot contain any toxic ink or glue. See the [Codex General Standard for the Labelling of Pre-packaged Foods](#) or [Regulation \(EU\) No 1169/2011](#) on the provision of food information to consumers. If the nature of the produce is not visible from the outside, the package must be labelled with the name of the product, and the (optional) name of the variety and/or commercial name.
- The following items should be on the label of (pre-packed) fresh fruits:
  - the name under which the product is sold,
  - the commercial identification: class, size (code), number of units, net weight,
  - name and address of the producer,
  - place/country of origin.
- In addition, any certification logo or retailer logo, in the case of private label products, should be on the label. Listing ingredients is not mandatory for fresh fruit unless a container holds several different products, in which case a list of ingredients and quantities of each product is on the label.
- [For more information on labelling, packaging and quality see also: Codex Alimentarius](#) or read more about [food labelling in the EU Export Helpdesk](#).

## What is the demand for fresh exotic tropical fruit in Europe?

General information and figures about production and trade developments in the European market for fresh fruit and vegetables are provided in the [CBI Trade Statistics for Fresh Fruit and Vegetables](#) on the [CBI Market Intelligence Platform](#). This section provides you with more detailed statistics about trade and consumption of fresh tropical exotic fruit in Europe.

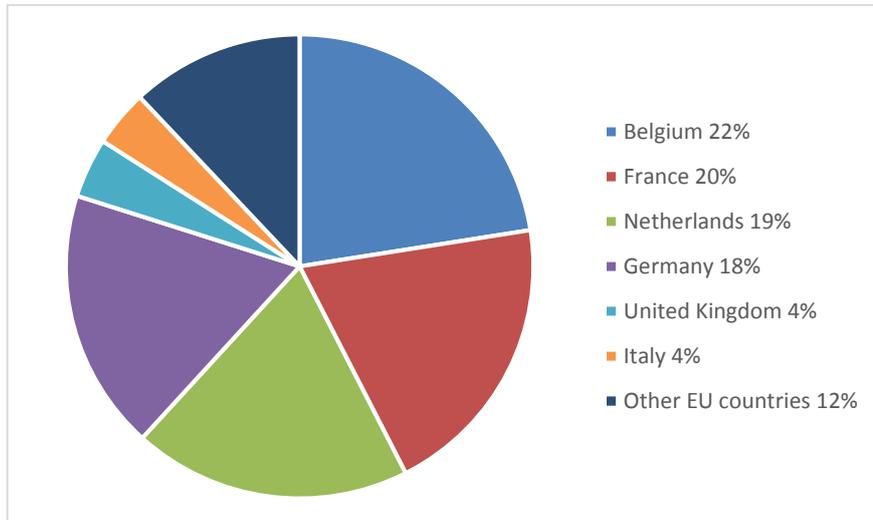
## Imports

**Figure 1: EU import of fresh tropical exotic fruit in 1000 tonnes**



Source: [Market Access Database](#) (Comext)

**Figure 2: Import volume of fresh tropical exotic fruit in 2014, share per EU country**



Source: [Market Access Database](#) (Comext), calculation by ICI Business

## Interpretations and opportunities

- In 2014 European buyers imported over 35 thousand tons of exotic tropical fruit from outside Europe, almost exclusively from developing countries. Since 2012, the import of fresh exotic fruit has shown an upward trend.
- Total European imports of exotic tropical fruit from outside Europe were valued at nearly 94 million euro in 2014, of which 91 million euro came from developing countries. The import value of exotic tropical fruit is growing slightly.
- The main importing countries according to trade statistics are Belgium, France, the Netherlands and Germany. Together these countries represent almost 80% of the total imports. This applies to all products in the exotic tropical fruit group.
- **Lychees and rambutans:** European markets receive lychees from China, Israel, Mauritius, Mexico, Thailand, South Africa, Madagascar, as well as Thailand and Brazil. Madagascar is the main supplier of lychees to the European market. Lychee arrivals are concentrated in December. Exotic fruit exports (mainly lychees) from Madagascar fluctuated between 11 and 21 thousand tonnes in the period 2010-2014. Closely related to the lychee family are **rambutans**, which are imported mainly from Vietnam, Thailand and Indonesia. See also CBI Product factsheets for [fresh lychee](#) and [fresh Rambutan](#).

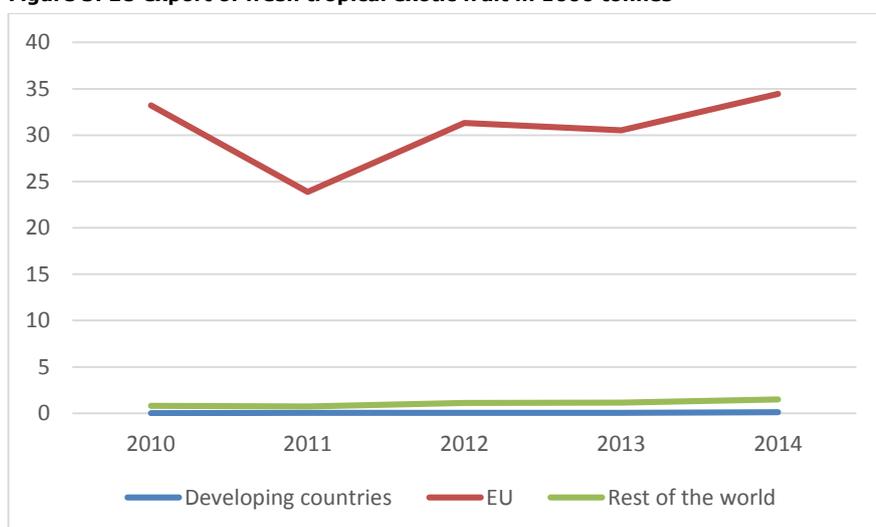
- **Passion fruit:** Most passion fruit (purple) enters Europe as concentrates or juice for the food industry. However, the fresh market is growing as well with imports from Vietnam, Kenya, Zimbabwe, South Africa, Colombia and Israel. While African suppliers export fresh passion fruit to Europe, Colombia, Ecuador and Peru export a larger volume of processed passion fruit (i.e. pulp or concentrated juice). See also [CBI Market Intelligence for processed fruit and vegetables](#). Yellow passion fruit (maracuyá) is less well known but imported in small quantities from Colombia and Ecuador.
- **Carambola:** Malaysia is one of the main suppliers of carambola into Europe.
- **Pitahaya:** A fruit variety also referred to as dragon fruit, which is virtually unknown in most European countries. The main supplier of red pitahaya to the European market is Vietnam, but during the season it changes to Israel and South America. Israel supplies the Southern Part of Europe by sea which has a lower cost price than Vietnam supplying by air. Colombia and Ecuador supply a yellow variety of pitahaya.
- Thailand is Europe's main supplier of the niche fruits **sapodillo plums** and **jackfruit**. **Tamarinds** are more often processed before exporting and used in food preparation.

#### Tips:

- [Fresh Plaza](#) is a good starting point if you are looking for current relevant information in the market for fresh exotic fruits.
- Find a European importer by presenting yourself at trade fairs such as [Fruit Logistica](#) in Berlin.
- Prices fluctuate during the year. Find information about current fresh fruit prices at [French wholesale market at Rungis at the France Agrimer website and](#) evaluate if and when exporting your product is interesting.

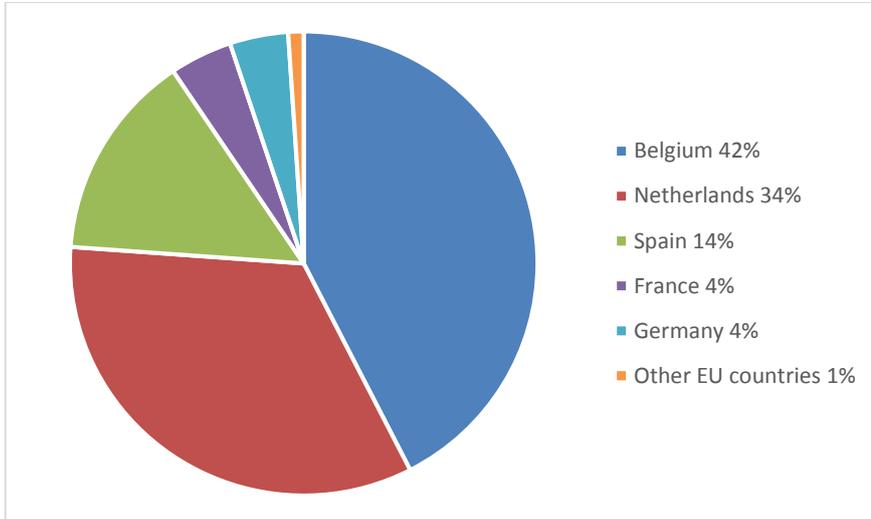
## Exports

Figure 3: EU export of fresh tropical exotic fruit in 1000 tonnes



Source: [Market Access Database](#) (Comext)

**Figure 4: Export volume of fresh tropical exotic fruit in 2014, share per EU country**



Source: [Market Access Database](#) (Comext), calculation by ICI Business

### Interpretations and opportunities

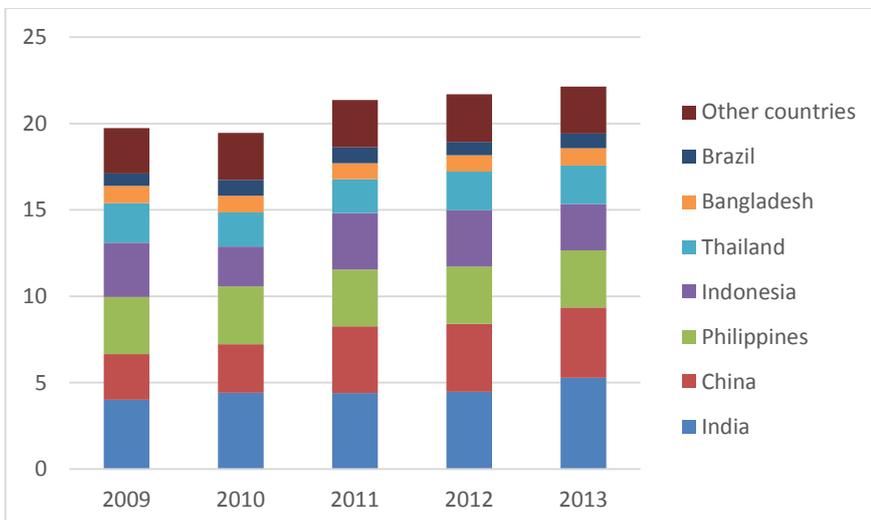
- In 2014, the Netherlands and Belgium were the main (re-)exporting countries with around 76% of total EU exports (27 thousand tonnes). Most of their export goes to Germany (8 thousand tonnes) and France (11 thousand tonnes). The Netherlands also exports a significant amount to the UK (900 tonnes) and Sweden (700 tonnes)
- The European export value in 2014 is almost 91 million euros, of which 86 million euros was intra-EU trade. Between 2010 and 2014 the value of European exotic tropical fruit exports increased by 72%.
- Most of the exotic tropical fruit remains in the EU. Of the 34 thousand tonnes (re)exported by EU countries, only 1600 tonnes is exported outside the EU, mainly to Russia and Switzerland.

#### Tips:

- Find an importer in the Netherlands or Belgium. These countries are the main entrance points into Europe and can open a much larger market.
- Keep track of trade developments and statistics on [Trade map](#) from the International Trade Centre.

### Production

**Figure 5: Global production of tropical fruit, in million tons**



Source: [FAOSTAT](#) (according to Faostat code 0804.50\_b: "Fruit, tropical fresh, not specified elsewhere". See "product description" above)

## Interpretations and opportunities

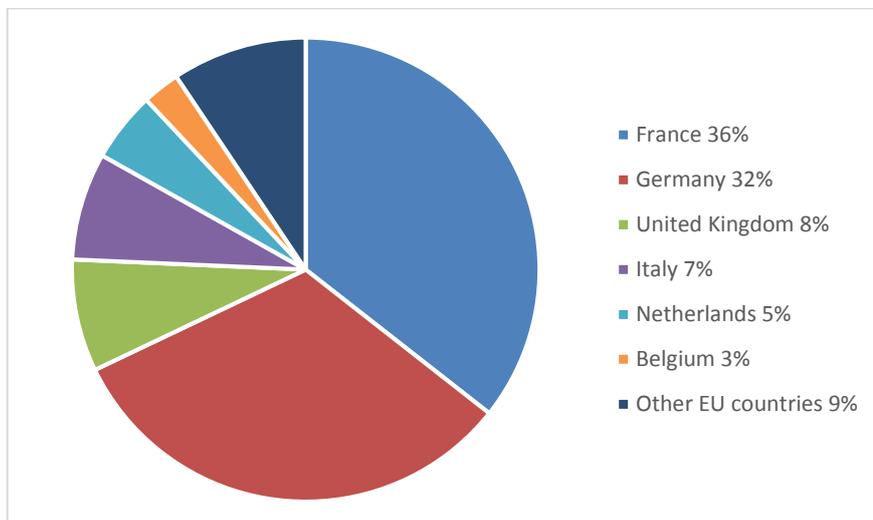
- The main producers in the world of tropical fruit are India, China, the Philippines, Indonesia and Thailand. The total worldwide production of exotic fruit like rambutan, passion fruit and lychee is gradually increasing. In 2013, production volume reached 22 million tonnes.
- The only countries in the EU with reported production of exotic fruits (FAOSTAT: Tropical Fruits, nes) are Spain and Cyprus. In Spain, some pomegranates, kaki fruit, and cherimoya are grown in the coastal region of Granada. Spanish production was a little over 60 thousand tons in 2013.
- **Passion fruit:** Brazil is the largest producer of passion fruit (including the yellow variety), but a minor exporter because of its large internal market. Various African countries e.g. Kenya and South Africa, Israel and Vietnam produce (purple) passion fruit. In South America e.g. Colombia, Ecuador, Peru produce both the purple and the yellow varieties.
- **Carambola:** Mainly produced in South East Asia, with India as the largest producer, carambolas (also called star fruit) are part of the lesser known fruits species in Europe. Production in Latin America is much lower, but increasing in for example Peru.
- **Lychee:** Although Madagascar is the largest exporter of lychees to the European market, the production volume is largest in China and India. Vietnam, Thailand and Mexico also have significant production of lychees.
- **Pitahaya:** The cultivation of pitahaya consists of different varieties: Red peel-red flesh, red peel-white flesh and yellow peel-white flesh. The red varieties are most common and cultivated throughout Asia (Vietnam, Thailand, Malaysia), Israel and South and Central America. The less known yellow variety is produced in Colombia and Ecuador.
- **Rambutan:** Rambutans supplied to Europe mainly originate from Asian countries. Still, some Latin American countries, i.e. Honduras, Guatemala and Mexico, also produce rambutans.
- **Cashew apple:** Cashew apples, unlike the cashew nut, are not very common as an export product to Europe. With around 1,8 million tonnes, Brazil is the largest producer (and consumer) of cashew apples ("caju"), followed by Mali with 75 thousand tonnes.

### Tips:

- Fill in the gaps when there is shortfall from traditional suppliers. Populations in Asian countries are increasing. Over time more Asian production will be needed for domestic markets. Filling in the gap for traditional Asian suppliers to the European market has great potential.
- Try to supply Europe with fresh lychees just outside or in the extension of the production seasons of the main suppliers China and Madagascar.
- Keep cost price low for pitahaya in order to compete with production from Israel.
- Find more information about worldwide production of fresh tropical and exotic fruit at [FAOSTAT](#) to increase your knowledge about potential competitors and to identify opportunities.

## Consumption

Figure 6: Estimated EU consumption of tropical exotic fruit in 2014, share per EU country and based on import and export volumes



Source: [Market Access Database](#) (Comext), calculation by ICI Business

## Interpretations and opportunities

- The total consumption of exotic tropical fruit is around 36 thousand tonnes. According to import and export figures, France and Germany are by far the largest consuming countries. However, within these specific statistics there is a margin for error.
- Southern Europe has a great consumption of tropical fruit, but the most exotic varieties are best introduced in North-western Europe and the Scandinavian countries.
- With changing consumption patterns and increasing incomes, Eastern EU member states are expected to grow as well.
- Diversification and the increasing interest in new fruit varieties will help exotic fruit segment to continue growing.

### Tip:

- The European market for exotic fruit has growth potential. Promote the health benefits, the taste, or consider sustainable production in order to increase interest.

## What trends offer opportunities on the European market for fresh exotic tropical fruit?

[CBI Trend mapping](#) provides you with general trends in the European market for fresh fruits and vegetables. This section provides more details about specific trends in the market for fresh exotic tropical fruit.

**Growing interest in sustainable fruit:** Consumption of fresh fruit in Europe is developing towards a more sustainable approach to production and processing. Environmental and social issues are becoming more and more important. Social and environmental certification schemes include actions to strongly reduce and register the use of pesticides, take action on the safety of employees and/or even include price guarantees for producers. Certification schemes that are in line with the [Global Social Compliance Program \(GSCP\)](#) will have a higher chance of being accepted by European supermarkets. There is a clear demand for organic and fair-trade tropical fruit, with the UK and Germany as leading countries.

### Tip:

- Check the [Global Social Compliance Program \(GSCP\)](#) website for more information about social and environmental conduct.

**Attention to health food:** Consumers in Europe are becoming more aware of health issues and pay more attention to their diet. Several exotic fruit types are well known for being healthy. Since EU consumers embraced healthy and tasty fruit, health benefits have become one of the main drivers for market success. For example:

- Being rich in antioxidants and vitamin C; and low in sugar, sodium, and acid, carambola has the potential to grow in the European market if proven health benefits are communicated more effectively.
- There is a growing demand for passion fruit in Europe, based on the perceived health benefits of the fruit. Find an importer to help you with smart promotion based on these benefits.

### Tip:

- Communicate the health benefits of the fruit to help expand the European market. Be aware of [European Legislation on food health claims](#).

**Organic niche:** Thanks to the increased attention to health and environment, there is also a growing interest in organically produced fruit and vegetables. Organic exotic fruit is a niche within a niche, but the combination can be very profitable. There are specialized importers of exotic fruit and organic produce.

### Tips:

- If your climate and soil are suitable for organic cultivation, verify with your buyer the possibilities for supplying organic exotic fruit.
- Read more about organic farming on the [Soil Association website](#).

**Taste is important:** European consumers want tropical exotic fruit to be ripe when bought, so that the fruit can be eaten immediately after purchase. Exotic fruit is generally expensive, thus increasing the importance of taste.

**Tips:**

- Make sure that supply chain logistics and transport processes do not affect product taste in any significant way.
- Preferably work with specialised importers of exotics. They are familiar with different taste preferences and know which varieties fit your destination market.

**Air or sea:** The choice of air or seafreight depends on the market and the shelf life of the product. Transport by ship will be much cheaper, however time to market will increase. Most exotic tropical fruit is shipped in small volumes by air, while larger commodities or less perishable produce is shipped by sea when possible.

## What requirements should exotic tropical fruit comply with to be allowed on the European market?

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.

For general information see also the buyer requirements for fresh fruit and vegetables on the [CBI Market Intelligence Platform for fresh fruit and vegetables](#).

## Requirements you must meet

### Pesticides

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers. To avoid health and environmental damage, 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. Note that buyers in several Member States such as the UK, Germany, The Netherlands and Austria, use MRLs which are stricter than the MRLs laid down in EU legislation.

**Tips:**

- To find out the MRLs that are relevant for fresh exotic fruit, use the EU [MRL database](#) in which all harmonised MRLs can be found. You can search on your product or pesticide used and the database shows the list of the MRLs associated to your product or pesticide. Read more about [MRLs in the EU Export Helpdesk](#).
- Reduce the amount of pesticides by applying [integrated pest management](#) (IPM) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.
- Check with your buyers if they have additional requirements on MRLs and pesticide use.

### Plant Health

Fruit and vegetables exported to the EU must comply with the EU legislation on plant health. The EU has laid down [phytosanitary requirements](#) to prevent introduction and spread of organisms harmful to plants and plant products in the EU. The requirements mainly imply that:

- Certain listed organisms are not allowed to be imported into the EU, unless specific circumstances apply. EU control measures are subject to change.
- Plants or plant products specified in Part B, Annex V of the Plant Health Directive [2000/29/EC](#) must be accompanied by a plant health certificate. A model phytosanitary certificate can be found through Annex VII of the Plant Health Directive.

**Tips:**

- Check with the relevant National Plant Protection Organisation (NPPO) or your EU importer what the requirements are for your product. Click [here](#) for a list of NPPOs.
- Read more about [plant health in the EU Export Helpdesk](#).

## Contaminants

Contaminants are substances that have not been intentionally added to food, but which may be present as a result of the various stages of its production, packaging, transport or warehousing. To avoid negative impact on the quality of food and risks to human health, the EU has set limits for several contaminants.

### Tips:

- Find the relevant contaminant levels in the annex of [Regulation \(EC\) 1881/2006](#). All contaminants are presented and maximum levels are provided per product or groups of products.
- Find out more about prevention and reduction of lead Contamination in the [Code of Practice](#) published by the Codex Alimentarius.
- Check the European Commission's factsheet on food contaminants "[Managing food contaminants: how the EU ensures that our food is safe](#)" and read more about [contaminants in the EU Export Helpdesk](#).

## Control of food imported to the EU

To ensure food safety and avoid environmental damage, the EU has restricted the use of certain chemicals in several Regulations and Directives. Your products will be subjected to official controls. These controls are carried out to ensure that all foods marketed in the EU market are safe, i.e. in compliance with the requirements applicable to them. There are three types of checks:

- Documentary checks
- Identity checks
- Physical checks

In the event of repeated non-compliance of specific products originating from particular countries, the EU can decide that controls will be carried out on an increased level or lay down emergency measures. Controls can be carried out at all stages of import and marketing in the EU. However, most checks are done at the points of entry in the EU.

Switzerland, Norway, Iceland and Liechtenstein are not EU members, but are part of the European Free Trade Association (EFTA). Their food laws are to a large extent identical with EU legislation. However, some aspects of legislation may differ. In Switzerland, import checks are the responsibility of the [Swiss Customs Administration](#) and the [Federal Office of Public Health](#).

### Tips:

- Familiarise yourself with the procedures before planning your exports to the EU. Failure to follow the right procedures could cause decrease and delay of orders, increase costs and result in actions by EU enforcement authorities.
- Make sure that the accompanying documents correspond (from A-Z!) with the food products contained in the consignment.
- Read more about [health control in the EU Export Helpdesk](#).
- Consult the [EU Export Helpdesk](#) for a full list of requirements for tropical exotic fruit, selecting the product code: **08109020**

## Common buyer requirements

### Certification as guarantee

As food safety is a top priority in all EU food sectors, you can expect most buyers to request extra guarantees from you in form of certification. [GlobalG.A.P.](#) is the most commonly requested food safety certification scheme, essential for exporting exotic fruit to the EU, especially via supermarkets. GLOBALG.A.P is a pre-farm-gate standard that covers the whole agricultural production process, from before the plant is in the ground to the non-processed product. Processing not covered under GlobalG.A.P.

Examples of other food safety management systems that can be required are British Retail Consortium ([BRC](#)) and International Food Standard ([IFS](#)), [FSSC22000](#) or [SQF](#). These management systems are additional to GLOBALG.A.P. and are recognised by the [Global Food Safety Initiative \(GFSI\)](#).

**Tips:**

- Check which Food safety management systems are most commonly requested in your target market. Expect GLOBALG.A.P. to be one of them.
- Read more on the different Food Safety Management Systems at the [Standards Map](#).
- As food safety is a major issue; work proactively with buyers to improve food safety and be transparent and up-to-date with buyer requirements and regulations.

## Quality standards

The General EU Marketing Standards also apply to fresh exotic fruit. EU buyers often require compliance with the standards of the United Nations Economic Commission for Europe ([UNECE](#)) or the [Codex Alimentarius Commission](#) (CAC). It should be noted that quality refers to both food safety and food quality.

**Tip:**

- Make sure you supply the quality as agreed in the product specifications with your buyer.

## Niche markets: Organic and Fair trade requirements

### Organic, a growing niche market

An increasing number of EU consumers prefer food products that are produced and processed by natural methods. The market for organic exotic fruit is a relatively small, but with a growing demand and limited supply. In order to market organic products in the EU, you have to use organic production methods according to [EU legislation](#). Furthermore, you have to use these production methods for at least two years before you can market the fruits and vegetables as organic. In addition, you (or your EU importer) must apply for an import authorisation from EU organic control bodies. After being audited by an accredited certifier, you may put the EU organic logo on your products, as well as the logo of the standard holder (e.g. [Soil Association](#) (especially relevant in the UK) , [Naturland](#) (Germany) or [Bio Suisse](#) (Switzerland)). Some of these standards are slightly different, but they all comply with the EU legislation on organic production and labelling.

**Tips:**

- Implementing organic production and becoming certified can be expensive, so assess the market potential before making any investments.
- Consult the [Standards Map database](#) for the different organic certifications.
- For the export of organic exotic fruit into the European market, use a competent and specialised importer, who understands the market and knows the way into niche markets with their particular requirements.

### Fair and sustainable

A small, but growing, niche market is the market for fresh products produced with more attention for on the social and/or environmental conditions in the producing areas. For exotic fruit social compliance is important, although product quality is top priority.

Examples of social or sustainable labels for fresh fruit and vegetables are [Fairtrade](#) , [Fair for Life](#) and the [Rainforest Alliance Certification Scheme](#).

European buyers can adopt initiatives which may impact you as a supplier. For example the [Ethical Trading Initiative](#) (ETI) in the UK, or the [Business Social Compliance Initiative](#) (BSCI) in North-Western Europe increase the importance of social compliance.

**Tips:**

- Check your company's current performances, for example by doing a self-assessment on the [BSCI website](#).
- Consult the [Standards Map database](#) for more information and for differences between fair trade labels.

## What competition do I face on the European exotic tropical fruit market?

For general information about market competitiveness for fresh fruit and vegetables you can have a look at the [Market Competitiveness information](#) available at the CBI market intelligence platform. The platform also provides the [Top tips for doing business with European buyers](#).

This section provides information about the market competitiveness of the EU market for fresh tropical and exotic fruit.

**Buyer power:** The majority of fresh tropical fruit in the North-western European market is sold through large supermarket chains, whereas specialist shops and markets dominate the Southern European market. The buyer power of large supermarkets is very strong and buyer requirements are very important. For tropical and exotic fruits, MRLs, quality during harvest and shipping and Corporate Social Responsibility (CSR) are becoming increasingly important, as are supply chain transparency and information sharing. Long term partnerships are sought by EU buyers to ensure product supply and quality.

**Degree of rivalry:** Worldwide production of tropical fruits is increasing and rivalry is fierce most of the time. Temporary shortfalls in supply (e.g. through harvest problems) have a huge impact on prices. New varieties of fruit need to add innovation and value in order to be successful, i.e. ready-to-eat products or recipes for (elements of) meals.

**Threat of new entrants:** Certification and meeting both legal and non-legal requirements form a major hurdle for producers and exporters wishing to enter the market.

**Substitute products:** In the last decade the diversity of fruit and vegetables supplied to the European market has increased. Exotic tropical fruits compete with other fruits, but can also complement them. They are distinguished by a higher price, a more exclusive image and perceived health benefits.

### Tips:

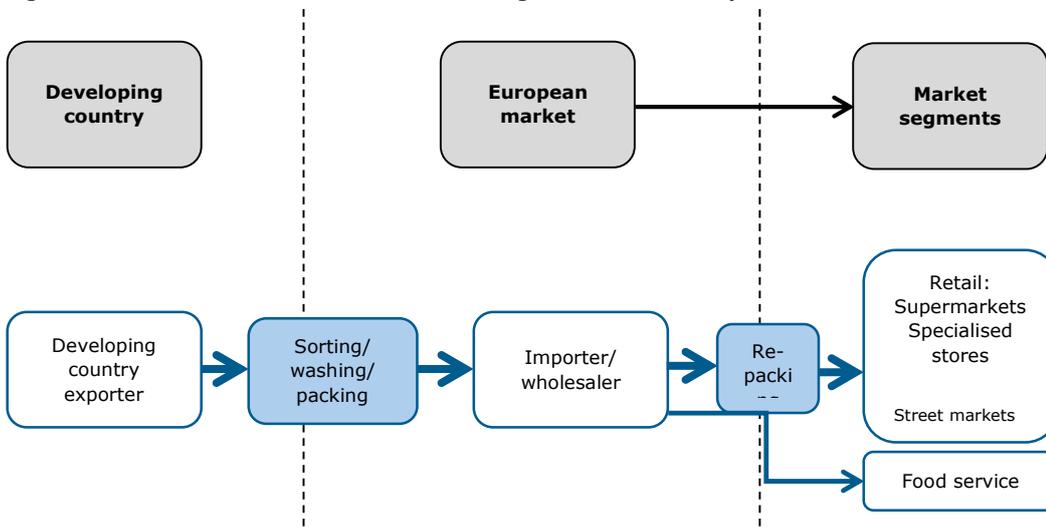
- Become part of a long term retail programme and improve your company's performance by building relationships with experienced buyers.
- Try not to compete on price alone, but build partnerships with buyers/ripening facilities and strive for excellent product quality and handling.
- Establish a credible track record including transparent information on your company and product quality. Being part of a stable partnership and being a trustworthy supplier can help you to establish and maintain your position on the market.
- Use storytelling (e.g. show the product's origin and producer), novel packaging and premium quality as methods for setting your product apart.

## What do the trade channels and interesting market segments look like in Europe for fresh exotic tropical fruit?

For more general information about market channels and segments, you can have a look at the [Market Channels and Segments](#) available at the CBI market intelligence platform.

This section provides some information about the various marketing channels through which fresh exotic tropical fruit is marketed in Europe.

**Figure 7: Market channels for Fresh Fruit and Vegetables in the European market**



### Interpretations and opportunities

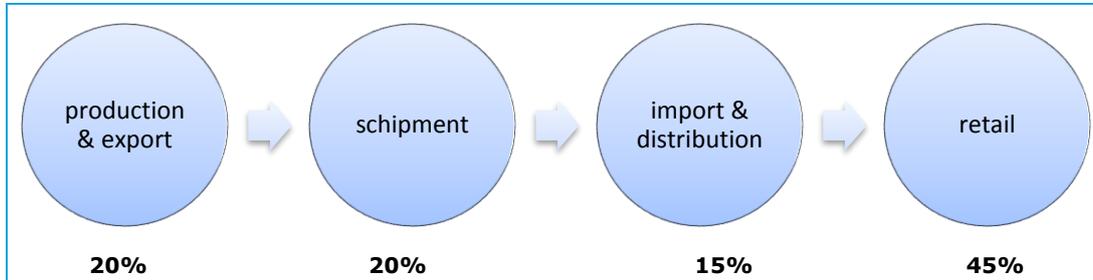
- In Europe there are differences between the compositions of market channels. Northern countries like Germany, the UK, the Netherlands and Belgium have a very dominant retail channel. France and Spain go beyond that with large hypermarkets, alongside smaller specialist shops. Countries in the Alpine region, such as Switzerland and Austria, are more favourably disposed towards small local shops.
- Although organic products are sold in retail outlets, there are also wholesale companies that are specialised in organic trade.
- Most exotic tropical fruits are sold via the retail channel although, for these types of product, the food service (i.e. restaurants) is also an important market channel.
- Supermarkets follow consumer trends and are diversifying their assortment of exotic fruit. However, for some niche products (jackfruit, pitahaya) the specialized retailers, ethnic shops and street markets are just as important market segments.
- Importers/distributors differ in their relationship with the retail sector. Some are suppliers for private label products; others have their own brand, while others market the brand of a producer (cooperation).

#### Tips:

- Find a European importer by presenting yourself at trade fairs such as [Fruit Logistica](#). All of the different channels start with a strong relationship with a European partner.
- Choose an importer, based on the size of your company or strategy. Determine if branding can be an added value for your product.
- If you choose the organic production method, find companies that are specialists in organic products. Check for example the online database [Organic-Bio](#).

## What are end market prices for fresh exotic tropical fruit?

Figure 8: Consumer price breakdown of exotic tropical fruit (indicative)



Prices for different products vary greatly. Generally, fruit with high wholesale prices are sold in smaller quantities and in smaller boxes. Shipping is often air freight. An indication of consumer prices in Europe:

- Pitahaya: 3-6 euros per piece
- Passion fruit: 0,60 – 0,70 per piece
- Lychees: 11-13 euro / kg
- Carambola: 1,50 – 2,50 euro per piece
- Fresh jackfruit, cashew apple and tamarind are not very common in the European market. Some exclusive varieties are only available on special order.

Figure 9: Example consumer prices in the Netherlands (august 2015)

	Lychees 250g 2,79 euro
	Passion fruit 4 pieces 2,49 euro Origin: Zimbabwe / Colombia

Source: [www.ah.nl](http://www.ah.nl)

### Tip:

- For consumer prices check the online shops or assortments of supermarket chains such as [Tesco](http://www.tesco.nl), [Albert Heijn](http://www.albertheijn.nl) or [Carrefour](http://www.carrefour.nl).

## Useful Sources

### Export and market entry support:

- CBI - <http://www.cbi.eu/>
- CBI market studies on fresh fruit and vegetables - [http://www.cbi.eu/marketintel\\_platform/Fresh-Fruit-Vegetables/136122/mar](http://www.cbi.eu/marketintel_platform/Fresh-Fruit-Vegetables/136122/mar)
- EU Export Helpdesk - [http://exporthelp.europa.eu/thdapp/index\\_en.html](http://exporthelp.europa.eu/thdapp/index_en.html)
- SIPPO - <http://www.switzerland-ge.com/global/export/en/sippo-services>

### **Certification schemes:**

- British Retail Consortium (BRC) - <http://www.brcglobalstandards.com/>
- BSCI - <http://www.bsci-intl.org/>
- FAIRTRADE - <http://www.fairtrade.net/>
- GLOBALG.A.P - [http://www.globalgap.org/uk\\_en/](http://www.globalgap.org/uk_en/)
- ISEAL - <http://www.isealalliance.org/>
- ITC standards map - <http://www.standardsmap.org/>
- Rainforest Alliance - <http://www.rainforest-alliance.org/>

### **Marketing and trade standards:**

- Codex Alimentarius - <http://www.codexalimentarius.org/codex-home/en/>
- European Food legislation - [http://ec.europa.eu/agriculture/organic/eu-policy/legislation\\_en](http://ec.europa.eu/agriculture/organic/eu-policy/legislation_en)
- The United Nations Economic Commission for Europe - <http://www.unece.org/>

### **Statistics and sector information:**

- Agricultural Research for Development - <http://www.cirad.fr/en>
- Fruitrop - <http://www.fruitrop.com> (publication of CIRAD)
- Freshfel - <http://www.freshfel.org>
- Freshplaza - <http://www.freshplaza.com>
- European Statistics Eurostat - <http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home/>
- FAOSTAT - <http://faostat.fao.org/>
- ITC Trade Map - <http://www.trademap.org/>
- United Nations Comtrade - <http://comtrade.un.org/>



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