



CBI
Ministry of Foreign Affairs

CBI Product Factsheet:

Fresh Limes in Europe

Introduction

Imports of fresh limes to the EU market grew by 26% in volume between 2009 and 2013, despite the economic downturn. Further growth is expected as a result of the increasing popularity of limes in food preparation, as well as in response to trends in the cosmetic and pharmaceutical industries and the tendency of consumers to regard limes as a regular fruit rather than a tropical and exotic fruit. Exporters from developing countries can take advantage of these developments and offer alternatives to the dominant supply from Mexico and Brazil.

Product definition

Limes are sour and have a diameter ranging from about 42-67 mm (for the Persian lime) up to 25->45 mm (for the Key lime). When ripe, limes are green/yellow. They are not usually consumed fresh, but are used for flavouring (including the skin).

The most commonly produced lime variety for fresh consumption is the Persian (or Tahiti) Lime (*Citrus latifolia*). Its popularity is due to its seedless nature. Key limes (*Citrus aurantifolia*) contain many seeds, making it less popular for fresh consumption.

Table 1: CN commodity code for fresh limes

Number	Product
08055090	Fresh or dried limes 'citrus aurantifolia, citrus latifolia'

Source: Eurostat Comext.

Product specification

Quality:

Limes are divided into three classes: Extra Class, Class I and Class II. Information on the quality requirements for each class is available in the [Codex Alimentarius](#) ('Food code' of WHO and FAO), the [UNECE standards for citrus fruit](#) and in the [General Marketing Standards of Regulation \(EU\) 543/2011](#). At the very least, limes should be intact, clean, sound and practically free of pests, damage, bruising and internal browning, in addition to being able to withstand transport and handling. Limes must have reached an appropriate degree of ripeness. In addition to having the proper colour (mostly green), the juice content must be at least 40% for Key limes and 42% for Persian limes.

The EU quality standards in [Regulation \(EC\) No. 1580/2007](#) specify that imports of fresh fruits and vegetables from third countries must conform to EU General Marketing Standards or their equivalent. Conformity must be verified 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 that have provided satisfactory guarantees of conformity, pre-export inspections may be conducted by the inspection bodies in these countries.

Size and packaging:

Limes are classified according to Size Codes 1-5, ranging from diameter 42–67 mm (Persian limes) to 25 → 45 mm (Key limes). See [Codex Alimentarius Standard for Key lime](#) or [Persian lime](#).

Packaging requirements differ by customer and market segment. At the very least, limes must be packed in such a way as to offer proper protection for the produce. The packaging must be new, clean and of a quality that can prevent damage to the product. Talk to your customers about their requirements and preferences with regard to packaging. The following are general characteristics are:

- Wholesale packaging in cardboard boxes or crates, which usually have a net weight of 4–4.5 kg, although some boxes can hold up 18 kg.

See the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits and Vegetables \(CAC/RCP 44-1995\)](#).

Labelling

Labelling on consumer packaging labelling must comply with the rules and regulations applying within the EU and European Free Trade Association (EFTA) market. Labels must not contain any toxic ink or glue. See the [Codex General Standard for the Labelling of Pre-packaged Foods](#) or [EU Directive 2000/13/EC](#), which establishes general rules for the labelling of pre-packaged food sold on the EU market. As of 13 December 2014, this regulation was replaced by [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 possibly the name of the variety and/or commercial name.

Labels for pre-packed or other fresh fruits should provide the following information:

- the name under which the product is sold;
- the product's commercial identification: class, size (code), number of units, net weight;
- the name and address of the producer;
- the place/country of origin.

In addition, the label should include any certification logo or retailer logo (in the case of private-label products). A list of ingredients is not mandatory for fresh fruit, unless the container holds several different products, in which case the label should include a list of ingredients, as well as the quantities of each product. See: [EU Marketing standards for fresh fruit and vegetables](#). The marketing standards specify rules for identifying several quality classes of limes, which must be indicated on the packaging (Extra Class, Class I, Class II).

The new [Regulation \(EU\) No 1169/2011](#) establishes the general principles, requirements and responsibilities governing food information, and in particular food labelling. It specifies methods for guaranteeing the right of consumers to access information, as well as procedures for the provision of food information, taking into account the need to provide sufficient flexibility to respond to future developments and new information requirements.

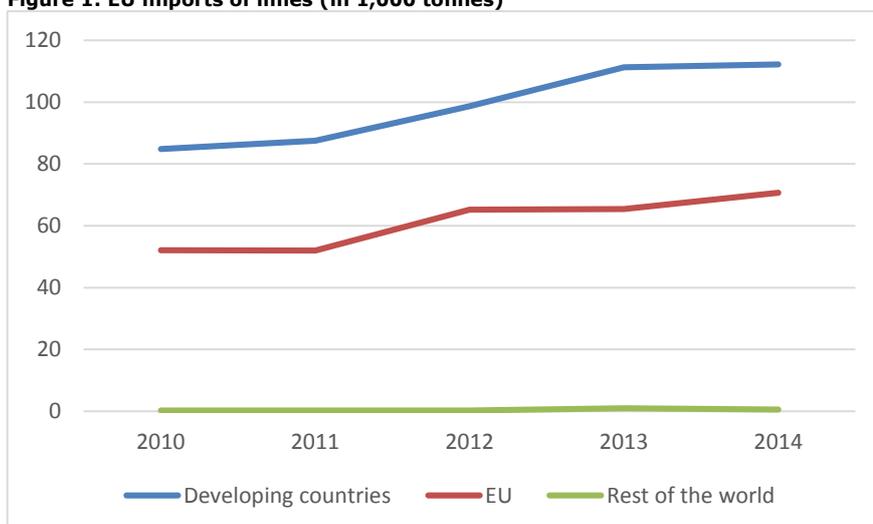
For additional information on labelling, packaging and quality, see also: [Codex Alimentarius Standard for Key limes](#) or [Persian limes](#) and the CBI Market Intelligence Platform for Fresh Fruits and Vegetables.

What is the demand for limes in Europe?

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

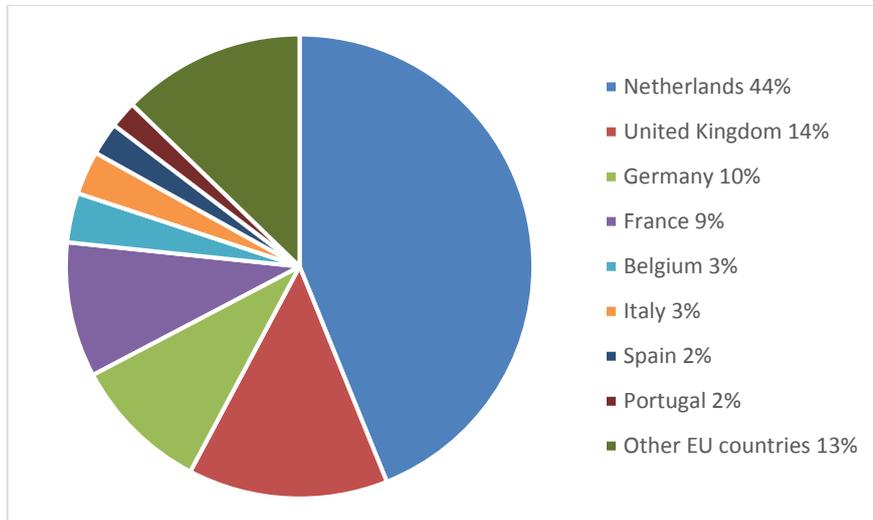
Import

Figure 1: EU imports of limes (in 1,000 tonnes)



Source: Market Access Database (Comext)

Figure 2: Import volume of fresh limes in 2014; share per EU country



Source: [ITC Trademap](#), calculation by ICI Business

Interpretations and opportunities

Imports of fresh limes into the European market have increased from 85 thousand tonnes in 2010 to 113 thousand tonnes in 2014. The most significant growth took place in 2012 and 2013. The growth in the European market for fresh limes is expected to continue. This is due to the increasing popularity of limes in the cosmetic and pharmaceutical industries, as well as to the tendency of consumers to regard limes as a regular fruit rather than as a tropical, exotic fruit.

In 2014, the total EU import value of limes from non-EU countries was around €138 million, with €137 million coming from developing countries. Although the import volume in 2014 was 33% higher than it had been in 2010, the import value increased much faster (i.e. by 72%) in the same period. These developments indicate that a higher price was paid in 2014.

Almost all of the fresh limes imported into the European market in 2014 originated from Brazil (73 thousand tonnes) and Mexico (34 thousand tonnes). Together, these two countries accounted for almost 95% of the import volume. If one of these main supplying countries is unable to fulfil the demand due to climatic difficulties or other circumstances, opportunities for suppliers from other countries will arise.

The Netherlands is the leading importer of fresh limes in Europe, accounting for 44% of all EU imports. Most of the imported limes are re-exported from the Netherlands to other countries in Europe (e.g. Germany, France and the UK).

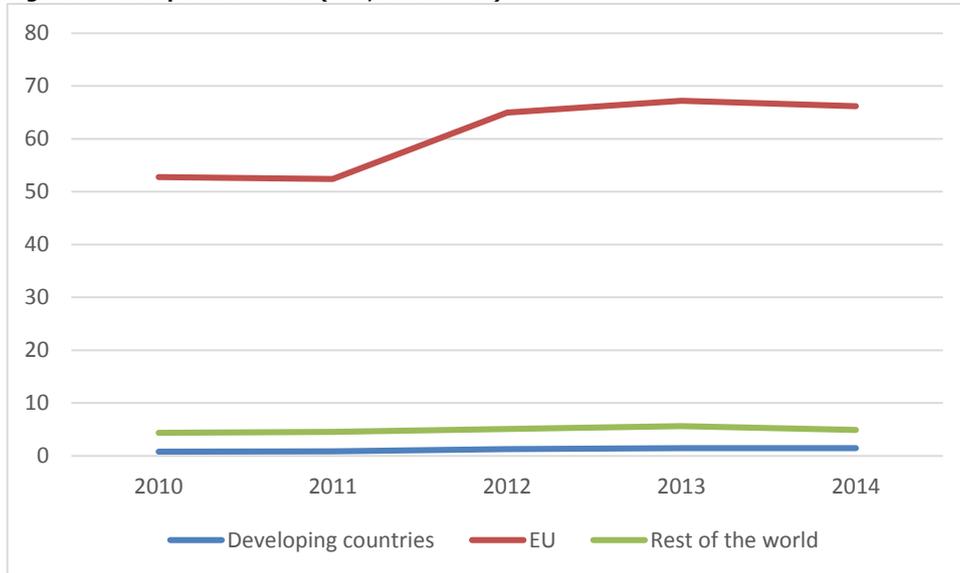
Fresh limes in Europe have market potential. Seedless varieties (Persian limes) are favoured over varieties containing seeds (Key limes).

Tip:

- Find a European importer by presenting yourself at trade fairs (e.g. Fruit Logistica). Additional information is available on the following website: <http://www.fruitlogistica.de/en/>

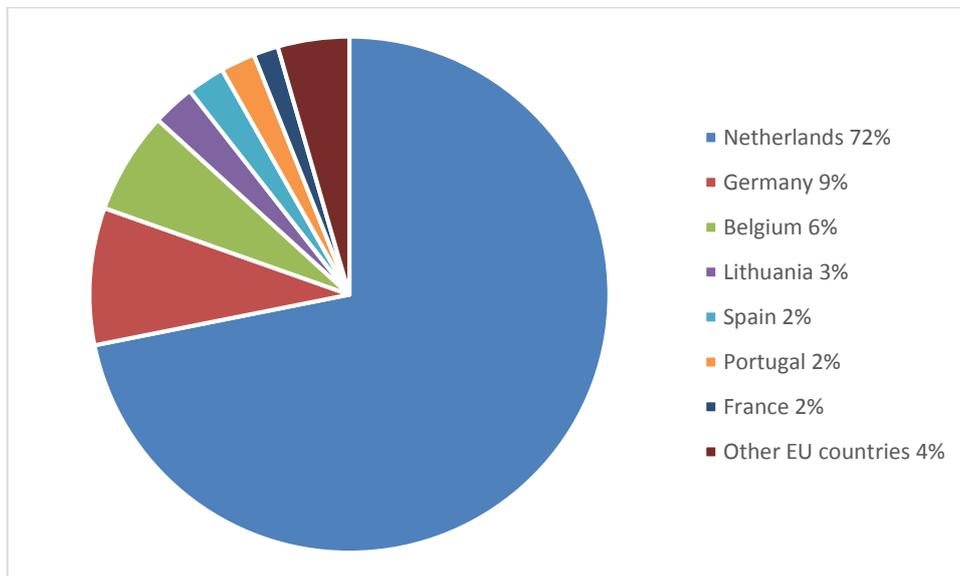
Export

Figure 3: EU exports of limes (in 1,000 tonnes)



Source: Market Access Database (Comext)

Figure 4: Export volume of fresh limes in 2014; share per EU country



Source: ITC Trademap, calculation by ICI Business

Interpretations and opportunities

European re-exports have remained high following rapid growth in 2012. Of the total EU imports of 113,000 tonnes in 2014, around 52,000 tonnes were re-exported through the Netherlands, most to other EU member states.

The total EU export value of limes to non-EU countries amounted to around €13 million in 2014. Similar to the situation with the import figures, the value of European exports has increased more rapidly than the volume has.

Major destination countries include Germany, France and the UK. Eastern European markets (e.g. Romania and Bulgaria) are still small, but they are experiencing strong growth. These markets often depend on re-exported limes.

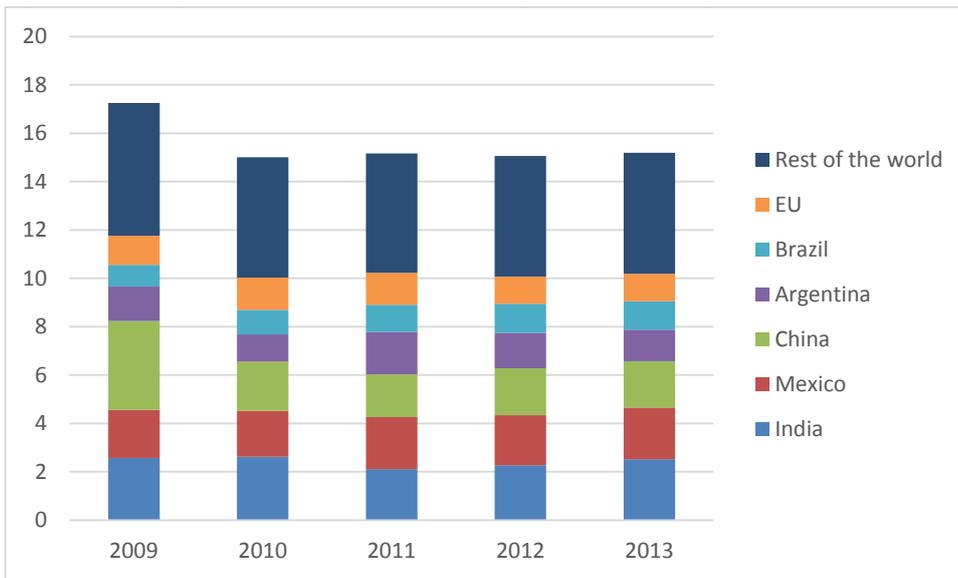
Tip:

- The Netherlands is by far the largest European trade hub for fresh limes in Europe. Find your importer there, and supply Europe with one partner.

Production

NOTE: Production figures are available only for lemons and limes combined. Because lemons are a far larger crop than limes are, the developments for the total group are likely to differ substantially from developments in the production of limes.

Figure 5: Global production of LEMONS & LIMES (in million tonnes)



Source: [FAOSTAT](#)

Interpretations and opportunities

China and India are the most important producers of lemons and limes in the world. The leading variety is the Persian (or Tahiti) lime.

The worldwide annual production of lemons and limes is relatively stable at a level of 15 million tonnes. Production in China has stabilised at 2 million tonnes. A 2012 increase in the acreage of lemons and limes suggests that production can be expected to increase. The combined production of India and Mexico amounts to 2 million tonnes as well.

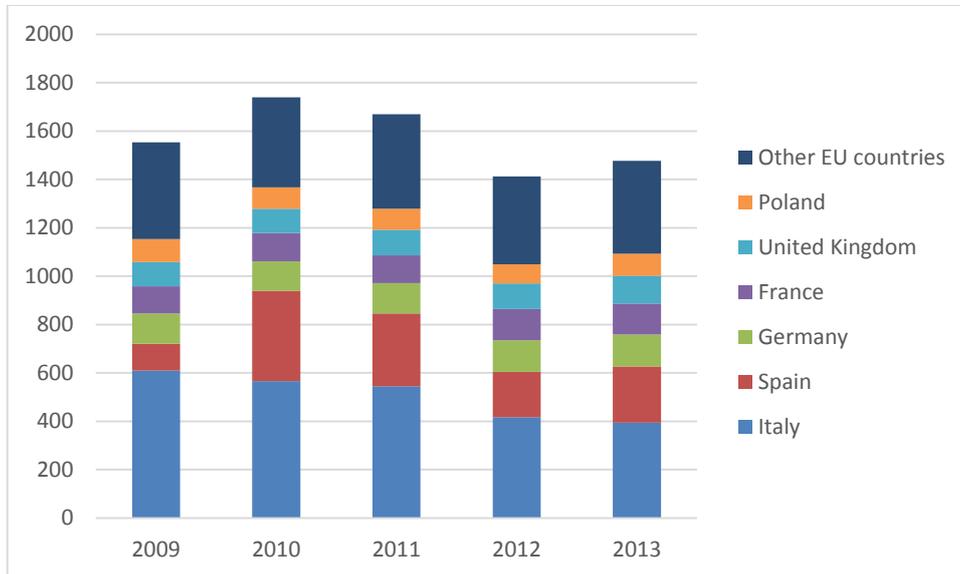
Tip:

- Focus on seedless varieties of limes, for which there is a growing demand in Europe, given its ease of use for meals and drinks.

Consumption

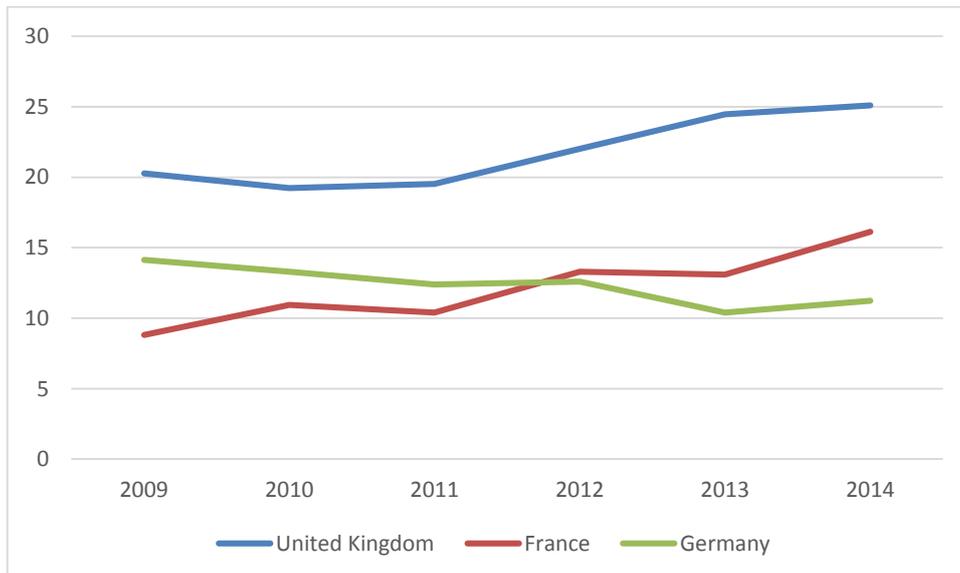
NOTE: It is not possible to calculate a reliable estimation of lime consumption, as no data are available. Nevertheless, because total European imports of limes are increasing, per capita consumption must be increasing as well. The figures below refer to the consumption for LEMONS AND LIMES in general, with a specific indication of growth in the consumption of LIMES in three major markets.

Figure 6: EU consumption of LEMONS & LIMES (in 1,000 tonnes)



Sources: [FAOSTAT](#), [Market Access Database \(Comext\)](#), [ITC Trademap](#), calculations by ICI Business

Figure 7: Consumption of LIMES in large EU markets (in 1,000 tonnes)



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

Interpretations and opportunities

Seedless varieties (Persian limes) are preferred over the varieties with seeds (Key limes). There are no market leaders with strong brands, and limes can also be sold without brand name or under private label in shops and supermarkets.

Limes are generally used for flavouring meals, and they are becoming increasingly popular in combination with tropical drinks or cocktails.

Tip:

- The website <http://www.freshplaza.com/> offers a large amount of current information and articles on the citrus market. Subscribe to newsletters in order to stay informed.

Which trends offer opportunities on the European market for limes?

[CBI Trend mapping](#) provides information on general trends in the European market for fresh fruits and vegetables. This section provides details about specific trends in the market for fresh limes.

Convenience fruit: Sales of seedless fruit varieties are increasing, in anticipation on consumer preferences for convenient, easy-to-use fruit. The same applies to seedless limes, which are easier to squeeze and mix. The demand for seedless limes is strongest in Western Europe.

Tip:

- Discuss the potential of your lime variety with an experienced importer. If you have the option, choose the most popular seedless variety.

Growing interest in sustainable fruit: In Europe, trends in the consumption of fresh fruit in Europe are developing towards more sustainable approaches to production and processing. Environmental and social issues are becoming increasingly important. Social and environmental certification schemes include actions aimed at sharply reducing and registering the use of pesticides, taking action to ensure the safety of employees and/or even including price guarantees for producers. Certification schemes that are in line with the [Global Social Compliance Program \(GSCP\)](#) are more likely to be accepted by European supermarkets.

Tip:

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

Organic niche: The increased attention to health and the environment is also generating increased interest in organically produced fruit and vegetables. Limes constitute a niche product that is used as an ingredient or flavouring. Because the skin of the fruit is used as well, consumers are likely to pay more attention to organically produced limes.

Tip:

- Read more about organic farming on the [Soil Association website](#).

With which requirements should limes comply in order to be allowed on the European market?

Buyer requirements can be divided into (1) musts (e.g. legal requirements), which you must meet in order to enter the market; (2) common requirements (which have been implemented by most competitors), with which you should comply in order to stay abreast of the market; and (3) niche market requirements for specific segments.

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

Requirements that must be met

Pesticides

Pesticide residues constitute a crucial issue for suppliers of fruits and vegetables. With the objective of avoiding 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 (e.g. the UK, Germany, the Netherlands and Austria) use MRLs that are stricter than those specified in EU legislation.

Tips:

- To identify the MRLs that are relevant for limes, consult the EU [MRL database](#), which contains all harmonised MRLs. The database is searchable according to product or pesticide used, and it provides lists of the MRLs associated with specific products and pesticides. Additional information about [MRLs is available 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.
- Ask your buyers whether they have any additional requirements concerning MRLs and pesticide use.

Plant health

Fruits and vegetables exported to the EU must comply with EU legislation on plant health. The EU has imposed [phytosanitary requirements](#) in order to prevent the introduction and spread of organisms that could be harmful to plants and plant products within the EU. The following are the most important implications of these requirements:

- Certain listed organisms may not be imported into the EU, except under specific circumstances. EU control measures are subject to change.
- Plants or plant products specified in Part B, Annex V of Directive [2000/29/EC](#) must be accompanied by plant health certificates.

Tips:

- Check with the relevant National Plant Protection Organisation (NPPO) or your EU importer to learn the requirements for your product. Click [here](#) for a list of NPPOs. A model phytosanitary certificate is available through [Annex VII](#) of the Plant Health Directive.
- Read more about [plant health in the EU Export Helpdesk](#).

Contaminants

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

Tips:

- Identify the relevant contaminant levels in the annex of [Regulation \(EC\) 1881/2006](#). All contaminants are presented, and maximum levels are provided for each product or group of products.
- Learn more about prevention and reduction of lead contamination in the [Code of Practice](#) published by the Codex Alimentarius.
- Consult 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 adopted several Regulations and Directives that restrict the use of certain chemicals. Your products will be subject to official inspections, which are conducted in order to ensure that all foods marketed within the EU are safe (i.e. in compliance with the applicable requirements). There are three types of inspections:

- Documentary inspections
- Identity inspections
- Physical inspections

In the event of repeated non-compliance of specific products originating from particular countries, the EU can decide to perform higher-level inspections or to impose emergency measures. Although inspections can take place at all stages of import and marketing in the EU, most are performed at the points of entry to the EU.

Switzerland, Norway, Iceland and Liechtenstein are not EU member states, but they are part of the European Free Trade Association (EFTA). Their food laws are largely identical to those specified in EU legislation, although some aspects may differ. In Switzerland, import inspections are the responsibility of the [Swiss Customs Administration](#) and the [Federal Office of Public Health](#).

Tips:

- Become familiar with the procedures. Failure to follow the proper procedures could result in decreased and delayed orders, increased costs and actions by EU enforcement authorities.
- Make sure that the accompanying documents correspond exactly to the food products contained in the consignment.
- Check to determine whether any increased levels of control apply.
- Read more about [health control in the EU Export Helpdesk](#).
- Consult the [EU Export Helpdesk](#) for a full list of requirements for limes, selecting the specific product code: **0805.50.90**

Common buyer requirements:

Certification as guarantee

Given the high priority of food safety in all EU food sectors, you can expect most buyers to request additional guarantees in the form of certification. The most commonly requested food-safety certification scheme, [GLOBALG.A.P.](#), is essential for exporting limes to the EU, especially through supermarkets. This pre-farm gate standard covers the entire agricultural production process, from before the plant is in the ground to the non-processed product (it does not extend to processing).

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

Tips:

- Identify the food-safety management systems that 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 in the [Standards Map](#).
- Be aware that food safety is a major issue. Work proactively with buyers to improve food safety, taking care to be transparent and current with regard to buyer requirements and regulations.

Quality standards

The General EU Marketing Standards also apply to fresh limes. Many EU buyers 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 the safety and quality of food.

Tip:

- Make sure to supply the level of quality agreed upon in the product specifications.

Niche markets: Organic and Fair trade

Organic: A growing niche market

Consumers in the EU are increasingly expressing a preference for food products that are produced and processed by natural methods. The market for organic limes is still small, but the demand exceeds the supply. In order to market organic products in the EU, you must use organic production methods, as specified in [EU legislation](#). Furthermore, you must have used these production methods for at least two years before you will be allowed to market the fruits and vegetables as organic. In addition, you (or your EU importer) must apply for import authorisation from EU organic control bodies. After being audited by an accredited certifier, you will be entitled to use the EU organic logo on your products, as along with the logo of the standard holder (e.g. [Soil Association](#) [especially relevant in the UK], [Naturland](#) [Germany] or [Bio Suisse](#) [Switzerland]). Regardless of several minor differences, all of these standards comply with the EU legislation on organic production and labelling.

Tips:

- Implementing organic production and becoming certified can be expensive. You should therefore assess the market potential before making any investments.
- Consult the [Standards Map database](#) for the different organic certifications.
- For the export of organic limes into the European market, use a competent and specialised importer who understands the market and who is familiar with the particular requirements and means of access for niche markets.

Fair and sustainable

A small but growing niche market is developing for fresh products that have been produced with greater attention to social and/or environmental conditions in the producing areas. For limes, social compliance can be important, although product quality remains the highest priority.

of the existing social and sustainability labels for fresh fruits and vegetables include [Fairtrade](#) , [Fair for Life](#) and the [Rainforest Alliance Certification Scheme](#).

Importers may also adopt other initiatives, which could also affect suppliers. Examples include such retailer initiatives as the [Ethical Trading Initiative](#) (ETI) in the UK and the [Business Social Compliance Initiative](#) (BSCI) in North-Western Europe.

Tips:

- Examine your company's current performance (e.g. by completing a self-assessment on the [BSCI website](#)).
- Consult the [Standards Map database](#) for additional information and to learn about differences between fair trade labels.

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What competition do I face on the European limes market?

For general information about market competitiveness for fresh fruits and vegetables, consult the [Market Competitiveness information](#) available at the CBI market intelligence platform. The platform also includes [Tips for doing business with European buyers](#).

This section provides information about the competitiveness of the EU market for fresh limes.

Buyer power: Limes are amongst the smaller species of citrus fruit in Europe. The current market is growing, and additional growth is expected, although there is a limit to the amount of limes that can be absorbed by the market. Changes in supply (e.g. due to weather conditions and larger harvest) can have serious consequences for prices. The buyer power of large supermarkets is very strong, and buyer requirements are very important. Buyers in the EU tend to prefer long-term partnerships as a means of ensuring the supply and quality of products. When there is sufficient supply, expect large retailers to have increased influence on the supply chain.

Degree of competition and threat of new entrants: Competition for limes is exceptionally strong from large producers in Brazil and Mexico. Certification and the need to meet both legal and non-legal requirements pose major obstacles to producers and exporters entering the market. Nevertheless, the continued growth in the European import market offers opportunities, including for producers from countries other than Brazil and Mexico.

Substitute products: Limes are not eaten fresh, but used in food or drinks. In general, new introductions should add innovation and value in order to be successful. In some food applications, lemons can be used as substitutes for limes.

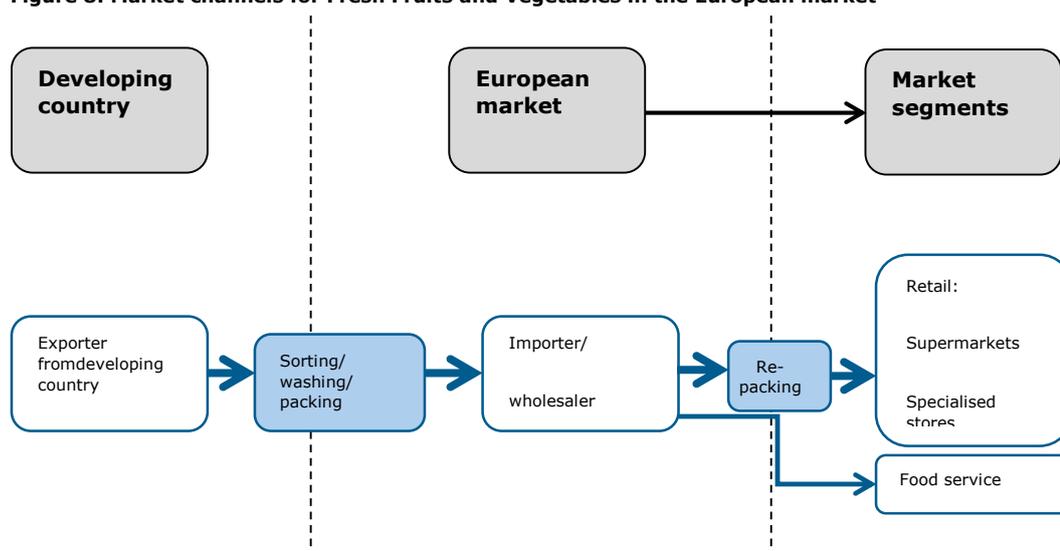
Tips:

- Try not to compete on price alone, instead building partnerships with buyers and striving for excellence in product quality and handling.
- Use storytelling (e.g. highlighting the origin and producer of your products), novel packaging and premium quality as methods for setting your product apart from the rest of the field.
- Establish a credible track record of providing 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.
- Prices for limes fluctuate strongly throughout the year. Find continuity in sourcing programmes supplying European retail.

Market Channels and Segments

For general information about market channels and segments, consult the [Market Channels and Segments document](#) available at the [CBI market intelligence platform](#). This section provides information about the various channels through which fresh limes are marketed in Europe.

Figure 8: Market channels for Fresh Fruits and Vegetables in the European market



Analysis and interpretation

The composition of market channels differs within Europe. Northern countries (e.g. Germany, the UK, the Netherlands and Belgium) have a highly dominant retail channel. France and Spain go even further with large hypermarkets, alongside smaller specialist shops. Countries in the Alpine region (e.g. Switzerland and Austria) are more favourably disposed towards small local shops.

Importers/distributors differ in their relationships to the retail sector. Some are suppliers for private-label products, while others have their own brands or market the brands of specific producers (cooperation).

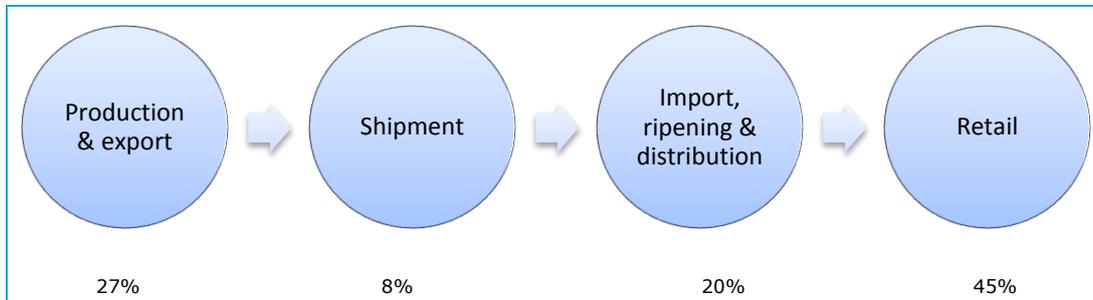
Although organic products are sold in retail at the wholesale and importer level, some companies are specialised in organic trade.

Tips:

- Find trade partners or clients at trade fairs (e.g. [Fruit Logistica](#)). Choose an importer based on the size of your company or strategy.
- If you choose to produce organically, find companies that are specialists in organic products. Examples include [Eosta](#) and [OTC](#) in the Netherlands.

What are end-market prices for limes?

Figure 8: Consumer price breakdown for limes



The product value of limes has been in an upward trend for several years. Price fluctuations and risk should always be considered with niche products, including limes. The European market is heavily dependent upon two leading suppliers: Brazil and Mexico. If one of these countries were to experience climatic difficulties, this would create opportunities on the EU market for producers in other countries.

In supermarkets, consumer prices vary from around €0.50 up to €1.00 per piece. Prices are lower at street markets, and organic limes can be sold for 50%–100% more.

Tips:

- Find information about current lime prices at the [fresh portal](#). For consumer prices, consult the online shops or assortments of supermarket chains, including [Tesco](#), [Albert Heijn](#) (search: 'limoen') or [Carrefour](#) (search 'citron vert').

Useful Sources

Export and market entry support:

- CBI - <http://www.cbi.eu/>
- CBI market studies on fresh fruits and vegetables - http://www.cbi.eu/marketintel_platform/Fresh-Fruit-Vegetables/136122/mar
- EU Export Helpdesk - 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/
- 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
- The United Nations Economic Commission for Europe - <http://www.unecce.org/tradewelcome/trade-home.html>

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/>
- United Nations Comtrade - <http://comtrade.un.org/>



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