

**CBI Product Factsheet:**

**Exotic Roots and Tubers in  
Europe**

## Introduction

The European market for exotic roots and tubers is small but gradually growing. Cassava and yams are the biggest sellers. Volumes of taro, yautia or malanga and other roots that are less well known in the European market, are still very small. The main market are ethnic food shops and restaurants, but increasing interest in exotic vegetables and stimulating consumer awareness of the culinary possibilities can help develop the market channels for exotic roots and tubers.

## Product Definition

This factsheet covers a number of roots and tubers that are exotic to the European market. The main varieties of which the tubers are used for human consumption covered in this factsheet are cassava (*Manihot esculenta* and *Manihot dulcis*), yam (*Dioscorea* spp.), taro (*Colocasia esculenta*), and yautia (*Xanthosoma* spp.). Sweet potatoes (*Ipomoea batatas*) are covered in another Product factsheet that can be found on the [CBI Market Intelligence Platform](#).

Roots and tubers are plants that produce starchy roots or tubers, rhizomes, corms and stems. In Europe, the most well-known tuber is the potato (*Solanum tuberosum*), which grows in temperate climates. They are used mainly for human food in both fresh or processed form, but also for animal feed and the production of starch and other products. We exclude crops grown mainly for feed or for processing (for chips, starch or sugar) and tuberous vegetables like onions, garlic and beets. In Europe, these roots are usually eaten boiled, baked or fried.

**Cassava** (*Manihot esculenta* and *Manihot dulcis*) is a root crop from the family of Euphorbiaceae. Also known as (or similar to) *manioc*, *yuca*, *balinghoy* or *kamoteng kahoy* (in the Philippines), *mogo* in Africa, *mandioca*, *tapioca-root* (predominantly in India), *aypu*, and *boniato*. Cassava are discerned into sweet cassava (*Manihot dulcis*) and bitter cassava (*Manihot esculenta*). Cassava is eaten boiled or baked, but mainly processed into flour and used for bread or porridge. In many tropical areas it is the main staple food. Cassava is grown in many tropical countries. The main producing countries of cassava are Nigeria, Brazil, Thailand, Indonesia, Democratic Republic of the Congo, Ghana and Angola.

**Yams** (*Dioscorea* spp) (French: igname, Spanish: ñame) consists of about 600 species, which can differ in size and appearance. Size can vary from 500gr to 5kg. Some examples of commercial varieties are *white yam*, *brown yam*, *yellow yam*, *purple yam*, *Chinese yam*, *elephant foot yam*. Name is similar to yam and is also known as *nyami*, *yampi*, *tropical yam*, *true yam*, *greater yam*, *cush-cush*, *mapuey*. Yams are grown in all tropical regions. They are predominantly eaten boiled or processed into yam flour to eat as porridge. The main producing countries of yams are Nigeria, Ghana and Ivory Coast.

**Taro** (*Colocasia esculenta* var. *esculenta*; *Xanthosoma sagittifolium* L. syn. *X. violaceum*), from the family of Araceae, is grown in all tropical regions. There are over 1000 known varieties. Also known as or closely related to *dasheen*, *eddoe* or *eddo*, *Chinese tayer*, (old) *cocoyam*, *kalo*, *keladi*, *kulkas*. In Suriname, taro is known as *aroei* by the native Indians, and is commonly known as *Chinese tayer*. The variety known as *eddoe* is also called *Chinese tayer*.

**Yautia** (*Xanthosoma* spp.) is closely related to taro and also a member of the Araceae family, also known as taro *tannia*, *malanga*, *chou caraïbe*, *macabo*, *new cocoyam*. The genus contains about 50 species, mainly grown in tropical America. Nowadays it is also grown in West Africa as a replacement for yams, and in the Philippines.

**Table 1: Combined Nomenclature (CN) commodity code for Roots and tubers**

Number	Product
07141000 (from 2013)	fresh, chilled, frozen or dried roots and tubers of manioc "CASSAVA", whether or not sliced or in the form of pellets
07143010 (from 2012)	YAMS "Dioscorea spp.", either fresh and whole or without skin and frozen, even sliced, for human consumption, in packings <= 28 kg
07144010 (from 2012)	TARO "Colocasia spp.", either fresh and whole or without skin and frozen, even sliced, for human consumption, in packings <= 28 kg
07145010 (from 2012)	YAUTIA "Xanthosoma spp.", either fresh and whole or without skin and frozen, even sliced, for human consumption, in packings <= 28 kg
07149020 (from 2013)	Arrowroot, salep and similar roots and tubers with high starch content, fresh, chilled, frozen or dried, whether or not sliced or in the form of pellets (excl. manioc "cassava", sweet potatoes, yams, taro and yautia)

Source: Eurostat Comext.

## Product Specification

This section provides you with general information on requirements and trade standards regarding quality, size, packaging and labelling. For more specific information it is always advisable to contact your buyer. Additional information on marketing standards can be found on the [CBI Market Intelligence Platform](#).

### Quality:

All roots and tubers imported into the European Union have to meet minimum quality requirements for fresh fruit and vegetables as laid down in EU law. [See the EU Export Helpdesk on Marketing Standards for more information](#).

The general marketing standard introduces a definition of "sound, fair and of marketable quality" and requires the product to bear the full name of their country of origin. The minimum standards imply that the product must be:

- Intact;
- Fresh and firm, not forked, free of secondary root growth, not hollow, and not woody, fibrous or spongy.
- Sound, products affected by rotting or deterioration such as to make them unfit for consumption are excluded;
- Clean, practically free of any visible foreign matter;
- Practically free from pests;
- Practically free from damage caused by pests affecting the flesh;
- Free of abnormal external moisture;
- Free of any foreign smell and/or taste;
- In a condition such as to:
  - enable them to withstand transport and handling, and
  - arrive in satisfactory condition at the place of destination.

For Roots and Tubers dealt with in this factsheet (with the exception of Cassava; see below), there is no specific quality standard developed yet. General marketing standards apply.

Checks on conformity with the general marketing standards 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 some countries that provide satisfactory guarantees of conformity, pre-export checks may be carried out by domestic inspection bodies. At the moment this applies to India, South Africa, Morocco, Kenya, Senegal or Turkey. See the [Export Helpdesk](#) (fill out the relevant CN commodity code mentioned in table 1) for more information and check the requirements and procedures for your product and destination market.

Whether or not physical inspections are carried out depends on the risk that the authorities attach to the produce. At the moment, manioc, taro, yautia, yam and similar products are not regularly inspected at import, but may be inspected on an ad-hoc basis or in case of any perceived risk. Keep in mind that Inspection Authorities are constantly monitoring and may change their policies.

The Codex Alimentarius ('Food code' of the World Health Organisation and Food and Agriculture Organisation) contains two separate Standards for commercial [Sweet Cassava](#) and [Bitter Cassava](#) which is to be sold fresh to consumers. Especially Bitter Cassava may contain toxic levels of cyanide and should be processed or at least cooked. The standards include quality classes (Extra class, Class 1, Class 2) and size classes (A,B,C).

### Size:

For yam, taro and other similar roots (with the exception of cassava), no size classes are defined. Usually, their average length in cm (e.g. 8-10 cm) and/or diameter in mm, and average weight (e.g. 800-1000 gr) is listed in the specifications. Make sure that you agree on the demanded sizes with your buyer before exporting.

Sweet cassava should not be less than 300 grams and not less than 20 cm in length. For Sweet Cassava there are 3 size classes defined as A (3.5 – 6.0 cm in diameter), B (6.1 – 8.0 cm in diameter), and C (> 8 cm in diameter). See [CODEX standard on Sweet Cassava](#).

### Packaging:

Wholesale packaging: in cardboard boxes of between 4 and 20kg, depending on the product. For the less sold varieties, buyers prefer smaller packaging. Packaging requirements differ between customers.

Roots and tubers must at least be packed to protect the produce properly, in new, clean and quality packaging to prevent damage to the product. Discuss with your customer about their preferred packaging requirements.

Retail packaging: fresh exotic roots and tubers are usually sold right out of the wholesale box or in plastic crates.

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

## Labelling:

Food placed on the EU market must meet the legislation on food labelling. On the label or marking of each box should at least be the following information:

- Identification: Name and physical address of the packer and/or dispatcher/shipper, or officially recognised code mark such as a GlobalGap Number (GGN);
- Nature of the produce: The name under which the product is sold;
- Origin: Country and/or region or local place name of origin;
- Commercial specifications: Class (if applicable); (if sized) expressed as minimum and maximum length (in cm) or as minimum and maximum diameter (in mm); number of units/net weight;
- For Cassava: A statement indicating that cassava should be peeled and fully cooked before being consumed is required;
- Traceability code (for example [Global Location Number](#));
- Official Inspection Mark (optional).

Producers and manufacturers can give additional labelling information, if it is accurate and does not mislead the consumer. It is recommend to also include the GGN code (GlobalGAP identification number of the producer). See also the buyer requirements below.

Additional requirements apply to organic produce and the labelling thereof. More information can be found on the [EU Export Helpdesk on labelling](#).

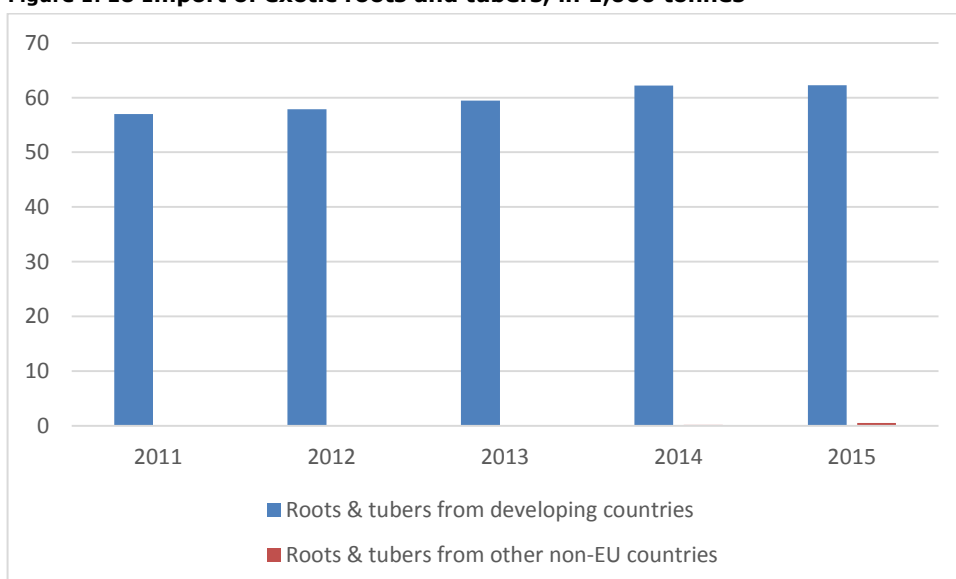
## What is the demand for exotic roots and tubers in Europe?

General information about trade developments in the European market for fresh fruit and vegetables is provided on the [CBI Market Intelligence Platform](#).

This section provides you with more detailed statistics about trade and consumption of fresh exotic roots and tubers in Europe.

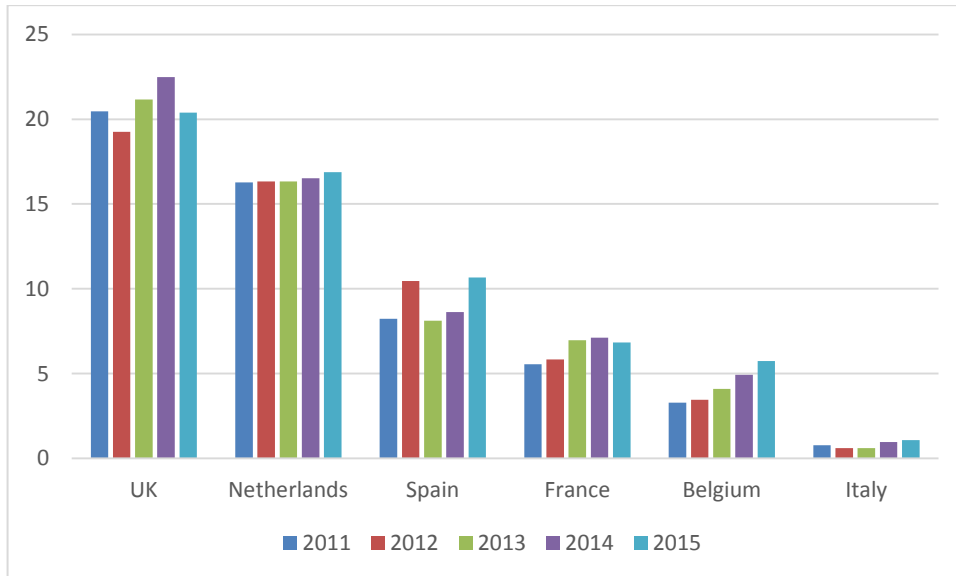
## Import

Figure 1: EU Import of exotic roots and tubers, in 1,000 tonnes



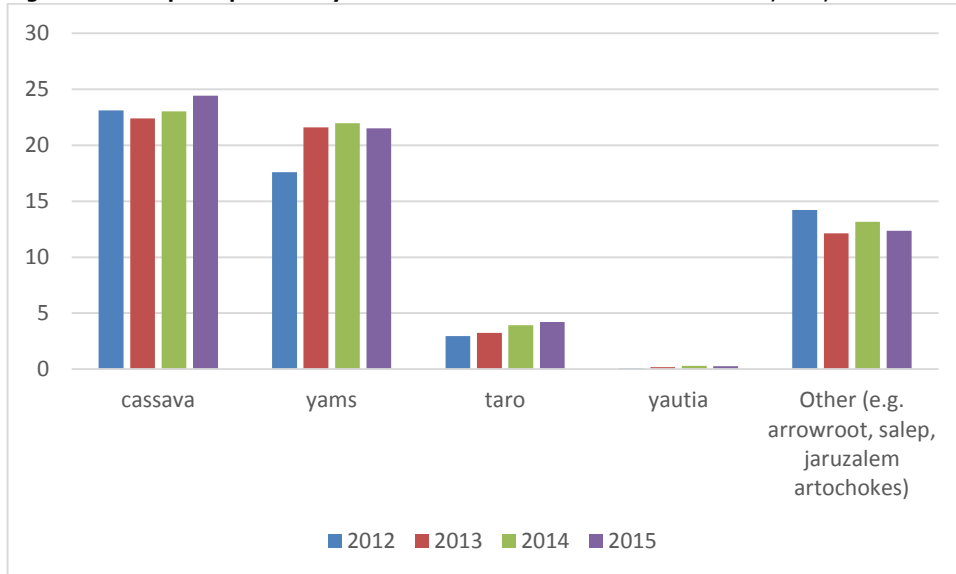
Source: [Market Access Database](#) (Comext)

**Figure 2: Main European importers of roots & tubers from non-EU countries, in 1,000 tonnes**



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

**Figure 3: EU imports per variety of roots & tubers from non-EU countries, in 1,000 tonnes**



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

### Interpretations and opportunities

- The import volume in the EU market from outside the EU grew from 57,000 in 2011 to 63,000 tonnes in 2015. Almost all imports came from developing countries.
- Within the EU, the United Kingdom (20,000 tonnes) and the Netherlands (17,000 tonnes) are the largest importers of exotic roots and tubers.
- Most imports in the EU came from Costa Rica (26,000 tonnes in 2015, mainly cassava) and Ghana (18,000 tonnes, mainly yams). China is also a relatively large supplier of Chinese yam and other roots and tubers, with a total of 4,000 tonnes of exports to the EU in 2015.
- These roots and tubers are considered ethnic foods and European countries with historical ties to (sub)tropical countries, like France, Portugal and the UK, are naturally larger markets due to their larger populations of ethnic African, South American or Asian people. The import of exotic roots and tubers is expected to continue to grow, while other types of consumers become more familiar with ethnic food as well.
- The Netherlands is a major re-exporter of fresh roots and tubers. Imports into the UK are destined for the UK market, and consist for over 70% of yam. Spain is a large importer of cassava from Costa Rica. France is also a

major importer, which imports about half of its exotic roots and tubers directly from developing countries and half via other EU countries, mainly the Netherlands.

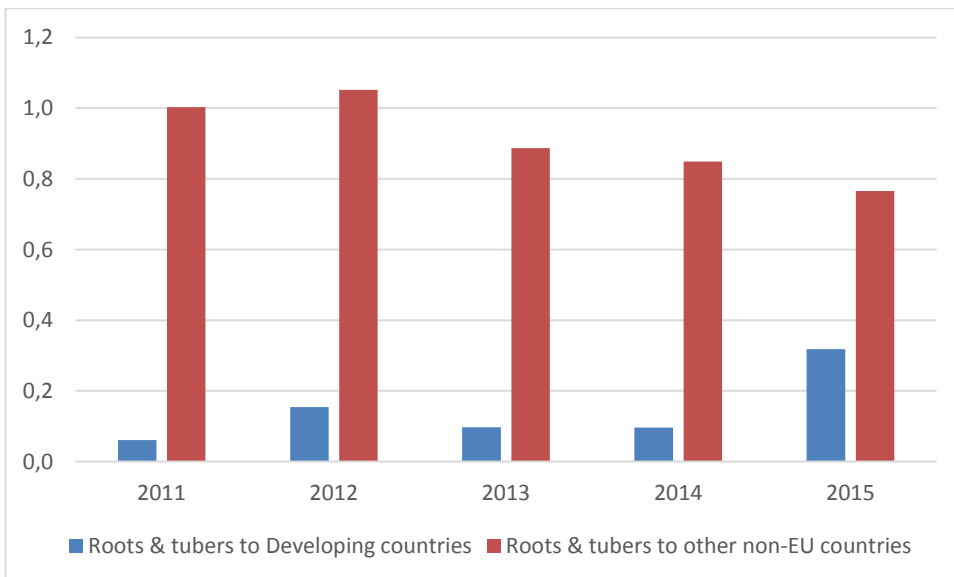
- The import market is dominated by a small number of importers of tropical fruit and vegetables in the Netherlands, the UK and France. The UK is considered to be one of the most important players in European yam imports, but imports through the Netherlands are also increasing.

**Tips:**

- Find a specialised importer with the right logistical facilities and distribution network.
- Explore the opportunities to deliver your products to the north-western European market through Dutch traders or UK importers.
- Visit or participate in trade fairs such as the [Fruit Logistica](#) in Berlin in order to find importers of exotic roots and tubers.

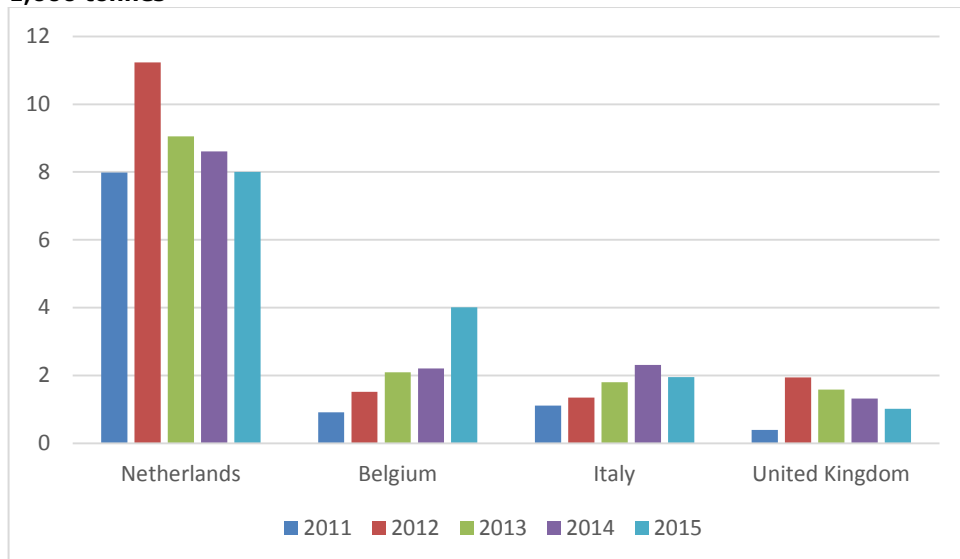
## Export

**Figure 4: EU exports of roots & tubers to non-EU countries, in 1,000 tonnes**



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

**Figure 5: Main exporters of roots & tubers (only cassava, yams, taro, yautia) to EU and non-EU markets, in 1,000 tonnes**



Source: [ITC Trademap](#)

### Interpretations and opportunities

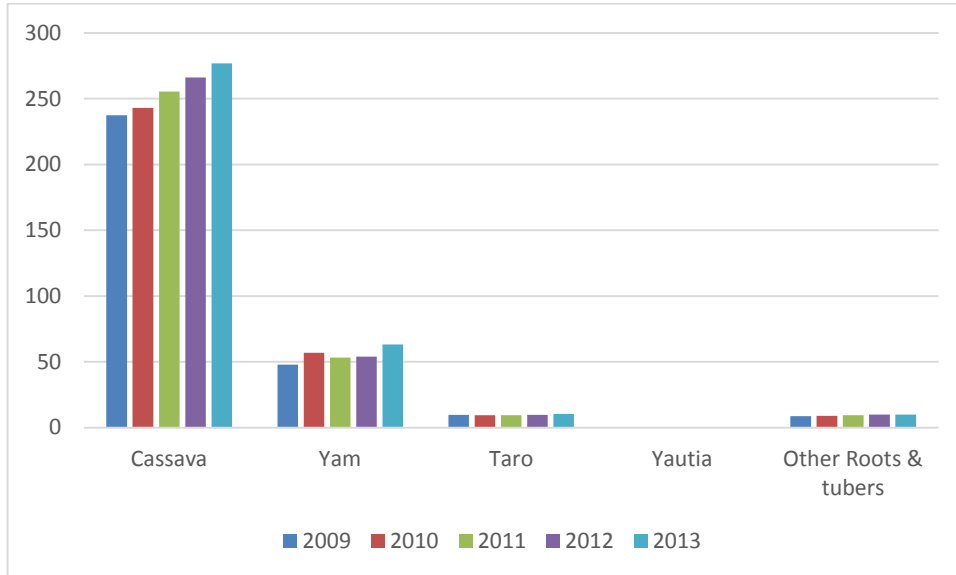
- A major part of exotic roots and tubers are re-exported by the Netherlands and Belgium. Belgium is becoming an increasingly important trade hub. Exports from Italy and Spain are mostly destined for Southern European markets including Spain and France. Being a trusted supplier to one of the specialised European importers in the Netherlands or Belgium may be an opportunity for growth.

#### Tip:

- Make sure your product can compete with the quality produce of other suppliers. Optimize your production and logistical processes or focus on different varieties. Keep in mind the application of good agricultural practices, quality, social compliance, and a constant focus on Maximum Residue Levels (MRLs).

## Production

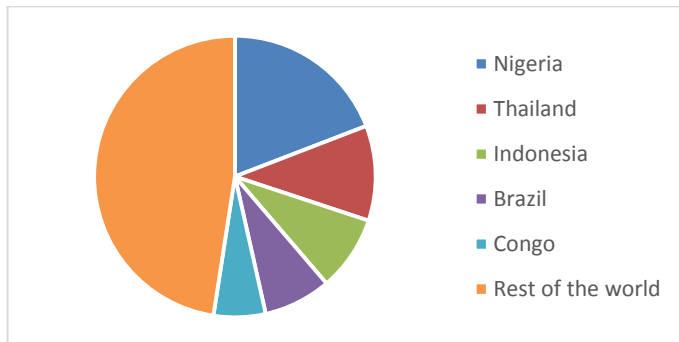
**Figure 6: Global production of exotic roots and tubers, in million tons**



Source: Statistics Division of the Food and Agriculture Organisation ([FAOSTAT](#))

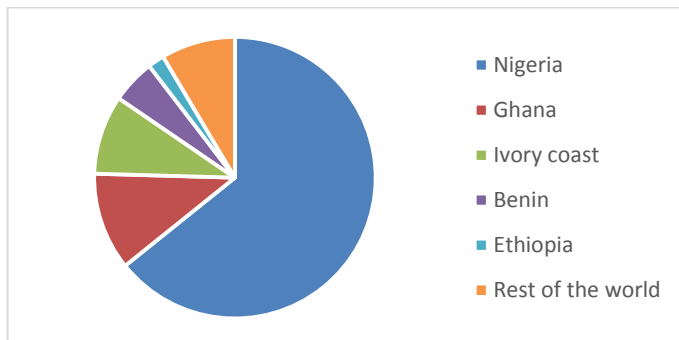
**Figure 7: Main producers per variety of roots & tubers in 2013, share per country, in million tonnes**

**Figure 7.1: Cassava**



Source: [FAOSTAT](#)

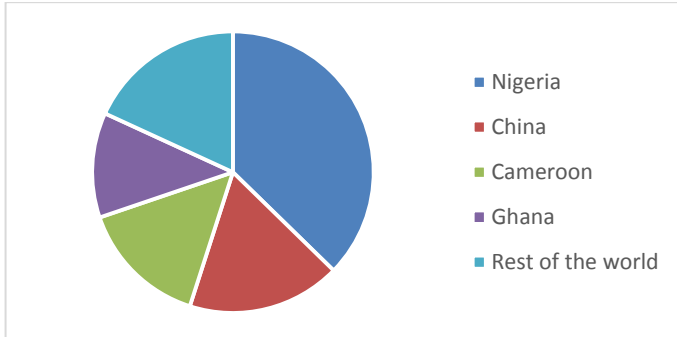
**Figure 7.2: Yam**



Source: [FAOSTAT](#)

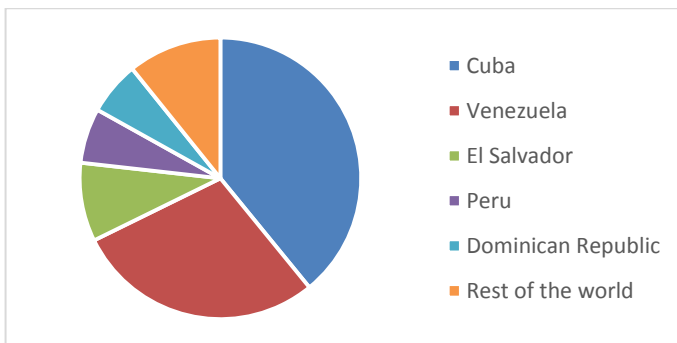


**Figure 7.3: Taro**



Source: [FAOSTAT](#)

**Figure 7.4: Yautia**



Source: [FAOSTAT](#)

## Interpretations and opportunities

- Worldwide production of cassava, yam, taro and other similar roots and tubers is growing. Total production amounted to about 360 million tonnes in 2013, which mainly consists of cassava (77%) and yams (17%). The figures on production include a large quantity of cassava, yam and similar roots for processing into flour or pellets for animal feed.
- Cassava and Yam are very important staple foods in many tropical regions. It is both a staple food and a culturally important crop in West Africa (the "Yam Belt"). The productivity of yam in the main growing countries of West Africa is however declining, due to soil depletion, high costs of planting material, pests and diseases. Yam production is relatively labour intensive and the costs of production are relatively high. Nevertheless, it is an important cash crop for many farm households. Paying attention to productivity is important from an economic point of view, but also reduces deforestation.
- There is no domestic production of fresh exotic roots and tubers in Europe, therefore export to Europe is possible all year round.

### Tip:

- Increase your chances on the European market by:
  - selecting the best products for export, and
  - maintaining good agricultural practices in order to keep yam production sustainable

## Consumption

### Interpretations and opportunities

- Comprehensive consumption statistics of fresh cassava, yam and other exotic roots and tubers in Europe are not available. However, in general consumption of these roots and tubers is not very high on an individual basis.

- On a European population of over 500 million, an import volume close to 60,000 tonnes is relatively small. In general, European consumers are not very familiar yet with cassava, yams and similar roots and tubers. The consumption is however expected to increase with the growing demand of new exotic vegetables, offering opportunities for professional and up-to-standards exporters from developing countries.

**Tip:**

- Explore the options to market your product with additional consumer information on storage, cooking methods and recipes. Producer organisations and exporters can work together with dedicated importers and retailers to increase consumer knowledge and appreciation for these ethnic food crops.

## What trends offer opportunities on the European market for exotic roots and tubers?

[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 roots and tubers such as yam and cassava.

**Growing interest in sustainable vegetables:** On a general level, food safety, Corporate Social Responsibility (CSR) and social compliance, health, and increasing attention to natural production methods are identified as key social trends in the European market for fresh fruit and vegetables. As cassava, yam, taro and similar crops are produced mainly in lower-middle income countries where these crops are important staple foods, labour conditions and local impact of exports will be a major point of attention. At the same time, maintaining good agricultural practices will help you stand out as a supplier and increase your chances with European buyers.

**Tips:**

- Check the [Global Social Compliance Program \(GSCP\)](#) website for more information about social and environmental conduct.
- Check for information on CSR labels and certification in the [Standards Map database](#).
- Find an experienced importer with a focus on sustainability. With such an importer involved in your supply chain organisation can greatly improve your chances of success.

**Interest in exotic food products:** In general there is a growing market for niche products in Europe. Yam and cassava exports can benefit from this trend, provided that the products are marketed as such. Attention to special culinary value of the produce, a fair trade character, will help to increase consumption.

**From ethnic to alternative food:** For cassava, yam and similar roots and tubers the market can be divided into different consumer segments: Ethnic consumers and non-ethnic consumers. The first group is already familiar with the crops and cooking methods. The second group is not and requires extra attention in terms of marketing. It is expected that gradually exotic roots and tubers will gain a more important place in European diets, as alternatives to potatoes, rice and pasta.

**Tip:**

- Promote the use of exotic roots and tubers by providing information such as recipes for home use. Many European consumers are prepared to try 'new' products. Health, ease-of-use, price and enjoyment are important principles which form the basis of consumer purchases.

**Increasing cooperation in export strategy:** Producers and exporters in developing countries work more and more together to increase the export potential of their country. Such a strategy will help meeting EU buyer requirements in terms of high quality, packaging and timely delivery. It will also help increase productivity, which is in line with the growing European interest in sustainable production. An example of such a cooperation is Ghana's Yam Sector Development Strategy in 2013, formulated with the help of national authorities, International Trade Centre (ITC) and the International Institute of Tropical Agriculture (IITA).

**Tips:**

- Facilitate your market entry in Europe by working together as a sector. As an example, read more about the [Ghanaian Yam sector strategy](#) on the website of International Trade Centre (ITC).
- Organise the production of small farms in a producer organisation to overcome some of the difficulties of limiting the environmental impact of production.

## What requirements should fresh exotic roots and tubers 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. As productivity in major producing regions (of yam e.g.) is under pressure, the threat of using more or other (not allowed) pesticides may be a risk.

##### Tips:

- To find out the MRLs that are relevant for exotic roots and tubers, 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 on 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 on the EU Export Helpdesk](#).
- Consult the [EU Export Helpdesk](#) for a full list of requirements for vegetables, including exotic roots and tubers, selecting the product codes within the range of: 0714

## 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 roots and tubers 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).

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 exotic roots and tubers. 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. As cassava and yams may deteriorate fast after harvesting when kept in a too warm environment, cooled storage, good packaging and cooled transportation are very important.

### Tips:

- Make sure you supply the quality as agreed in the product specifications.
- Pay attention to an effective post-harvest chain, including cold storage. Try to avoid damaging of the produce in any way, as any damage will increase the change of infection and deterioration of the produce.

## 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 roots and tubers is still small, but an interesting niche when the volumes further increase. 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 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 roots and tubers 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 roots and tubers 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](#).

### Tips:

- Make sure you supply the quality as agreed in the product specifications and discuss with your buyer which additional certificates are required. These requirements vary between countries and market segments.
- 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 market for exotic roots and tubers?

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 [tips for doing business with European buyers](#).

This section provides information about the market competitiveness of the EU market for fresh exotic roots and tubers.

**Company competition:** For cassava, yam and similar roots and tubers, the quantities sold per store are usually small. Nevertheless, supplying an importer that delivers to large retail buying organisations in different European countries requires the supply of large quantities of uniform quality produce on a tight schedule. A specialised (ethnic food) importer may buy smaller quantities of less well known varieties.

In general, rivalry is fierce in the trade of vegetables, so suppliers of fresh fruit and vegetables to European retailers are not in a position to argue about the rules of the game. For cassava, yam and similar exotic roots and tubers there is no European production, which enables suppliers from developing countries to supply year round at reasonable prices.

**Market entry:** Entering the European market is a big hurdle for many companies because of certification and meeting both legal and non-legal requirements.

**Product competition:** Cassava, yam and similar exotic roots and tubers are not an everyday product for Europeans. Ordinary (white) potatoes, rice, pasta and grains (bread) are usually the basis of meals in Europe. Sweet potatoes are increasingly popular as a substitute and cassava and yam are following this trend. Thus, besides from being ethnic food, exotic roots and tubers can be niche alternatives for regular staple food.

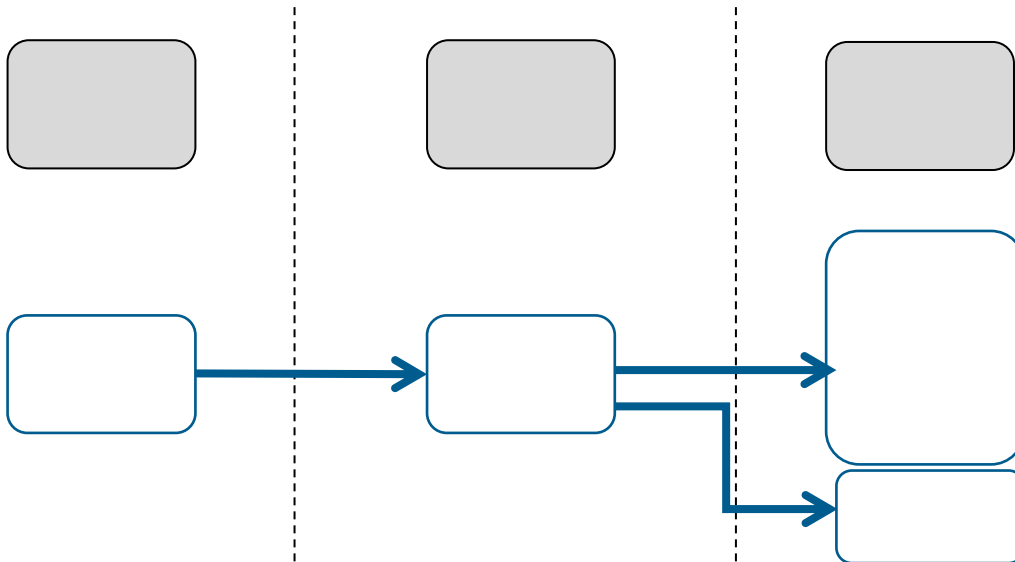
#### Tips:

- Contact an experienced importer before entering the European market, especially when you are aiming for large retailers. It is expected that supermarkets will include ethnic vegetables in their regular assortment. However, delivering to supermarkets is very demanding in terms of buyer requirements.
- Learn more about requirements on [Food Safety and Maximum Residue Limits on the CBI Market Intelligence Platform](#).
- Do not compete on price alone, but build partnerships with buyers 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 its 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 roots and tubers?

For more general information about market channels and segments you can have a look at the [Market Channels and Segments document](#) available at the CBI market intelligence platform. This section provides some information about the various marketing channels through which cassava, yams and similar exotic roots and tubers are marketed in Europe.

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



### Interpretations and opportunities

Cassava, yam and similar roots and tubers are mainly produced by small household farmers. Exporters often source from larger farms or cooperatives of smaller farms.

In the European market, exotic roots and tubers are mainly imported by a relatively small number of specialised importers of tropical and exotic fruit and vegetables. Generally these importers trade in a broad assortment of exotic fruit and vegetables. Other less specialised importers may buy cassava and yam on demand or in small quantities to supplement their general assortment. The main importers are located in the UK, the Netherlands and France.

The main segments are large retailers (supermarkets), specialised food stores and street markets, and food service and restaurants. Quality requirements are high throughout the European market, although supermarkets are toughest on MRLs. Although much of the exotic roots and tubers are sold to ethnic food restaurants, there is an evident potential for increased use in home cooking as well.

In Europe there are regional differences in the composition of market channels. Northern countries like Germany, the UK, the Netherlands and Belgium have a very dominant large retail channel (supermarkets). 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.

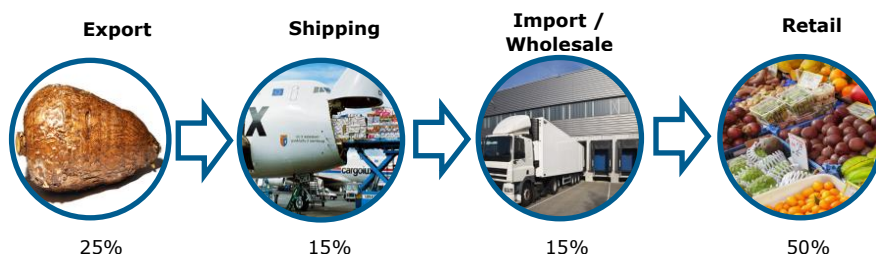
For roots and tubers, there is no clear distinction in price between the different market segments, although the restaurant sales channel and specialist food stores have a wider variety of roots and tubers than supermarkets. In supermarkets, only the large commercial varieties are sold.

#### Tips:

- Establish integrated producer cooperatives with enough assistance to farmers, checks on production methods, post-harvest handling and storage to keep quality up to standards.
- Evaluate your company's performance and readiness to supply large retailers using self-assessment and certification procedures. See also [Standards Map](#).
- Find your trade partner on trade fairs such as [Fruit Logistica](#).
- Work mainly with formally established and well-known import companies specialised in roots and tubers.

## What are end market prices for fresh roots and tubers?

Figure 8: Price breakdown in the Fresh Fruits and Vegetables supply chain



## 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/buyerrequirements](http://www.cbi.eu/marketintel_platform/fresh-fruit-vegetables/136122/buyerrequirements)
- EU Export Helpdesk - [http://exporthelp.europa.eu/thdapp/index\\_en.html](http://exporthelp.europa.eu/thdapp/index_en.html)
- ITC - International Trade Centre of WTO and UN - <http://www.intracen.org/>
- 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 Alliance - <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://ec.europa.eu/eurostat>
- FAOSTAT - <http://faostat.fao.org/>
- ITC Trade Map - <http://www.trademap.org/>
- United Nations Comtrade - <http://comtrade.un.org/>





**CBI Market Intelligence**

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

[www.cbi.eu/market-information](http://www.cbi.eu/market-information)

[marketintel@cbi.eu](mailto:marketintel@cbi.eu)

This survey was compiled for CBI by LEI Wageningen UR and updated by Michel Peperkamp | ICI Business  
in collaboration with CBI sector expert Piet Schotel

Disclaimer CBI market information tools: <http://www.cbi.eu/disclaimer>

July 2016