CBI Product Factsheet:

Fresh Sweet Potatoes in Europe
Introduction
The EU market for sweet potato is small but growing considerably. The import and consumption are rapidly expanding, increasing by 100% over the last five years. European supermarkets are catering to a growing demand of exotic and ethnic food. Important destinations in Europe are the UK and the Netherlands; the latter being the main hub for the rest of Europe. The USA withhold a 70% market share in the supply of sweet potatoes. Opportunities are there for suppliers from developing countries with differentiated or competitive products.

Product Definition
The sweet potato (Ipomoea batatas) is a root vegetable. Despite its name, the sweet potato does not belong to the same family as the potato (Solanum tuberosum). There are several kinds of sweet potato with different coloured skin and flesh, for example red, orange and yellow. The two main types of sweet potato are: dry flesh types and moist flesh types. Sweet potatoes are grown in tropical and warm temperate regions. The crop is sensitive to both frost and drought.

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<tr>
<th>Number</th>
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<tr>
<td>07142010</td>
<td>Sweet potatoes, fresh, whole, for human consumption</td>
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<td>07142090</td>
<td>Sweet potatoes, fresh, chilled, frozen or dried, whether or not sliced or in the form of pellets (excl. fresh whole sweet potatoes used for human consumption)</td>
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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
- For sweet potatoes no specific requirements are stated for sizes or quality in the Codex Alimentarius, the 'Food code' of the World Health Organisation (WHO) and the Food and Agriculture Organisation (FAO). The General Marketing Standards of Regulation (EU) 543/2011 apply.
- EU quality standards in Regulation (EC) No. 1580/2007 explain that imports of fresh fruit and vegetables from third countries must comply with the 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
- There are no rules on size. General size classes are baby, small, medium, L1, L2 and Extra Large.
- Packaging requirements for sweet potatoes 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.
- For wholesale, sweet potatoes are packaged in cardboard boxes or crates. These boxes can vary in size. Six or ten kilogram boxes are often used.
- In European retail outlets, sweet potatoes are usually sold out of the wholesale box or in plastic crates. More recently, sweet potatoes have also become available in consumer packing (sealed plastic).
- 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 European 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 (optional) the name of the variety and/or commercial name.
The following items should be on the label of (pre-packed) fresh vegetables:
- 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;
- packager or seller established within the EU;
- place/country of origin.

The new Regulation (EU) No 1169/2011 establishes the general principles, requirements and responsibilities governing food information, and in particular food labelling. It lays down the methods for guaranteeing the right of consumers to access information, and 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 more information on labelling, packaging and quality see also: Codex Alimentarius and the CBI Market Intelligence Platform for Fresh Fruit and Vegetables.

What is the demand for fresh sweet potato 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 sweet potatoes in Europe.

Imports

Figure 1: EU Import of sweet potato, in 1,000 tonnes

Source: Market Access Database (Comext)
Figure 2: Import volume of sweet potato in 2014, share per EU country

Source: ITC Trademap, calculation by ICI Business

Interpretations and opportunities

- Total imports of sweet potatoes in the European market amounted to 124 thousand tonnes in 2014, of which 7 thousand tonnes was not meant for human consumption. With respectively 82 and 44 thousand tonnes the UK and the Netherlands are the largest importers of sweet potatoes. Both countries show significant import growth (100% over 5 years). The UK mainly imports for the home market. The Netherlands is a trade hub for other EU countries.
- The total EU import value of sweet potatoes from non-EU countries amounted to around 86.5 million euro in 2013, of which over 19 million euro from developing countries. Over the past 5 years both import volume and value have doubled.
- The European market is dominated by the suppliers from the USA with a steady market share of over 70% (both in volume and value in extra-EU import). The USA have a year round supply of orange-flesh sweet potatoes and logistical processes are well developed.
- However, imports of other varieties from other parts of the world show that niche markets can be developed. In 2014 the EU imported sweet potatoes from countries such as Egypt (10 thousand tonnes), Honduras (8 thousand) and Israel (6 thousand) and smaller amounts between 1 and 2 thousand tonnes from Senegal, South Africa and Brazil.
- Importers in the European market favour larger producers, such as in the USA, because of supply certainty. However, increased imports from other parts of the world prove that there is room for other suppliers. In 2014, the EU imported sweet potatoes from countries such as Egypt (10 thousand tonnes), Honduras (8 thousand) and Israel (6 thousand). Senegal, South Africa and Brazil supplied smaller amounts between 1 and 2 thousand tonnes.
- The supply from Israel is in an upward trend again since 2012 and the import from Egypt boomed from a stable 3 to 4 thousand tonnes to nearly 10 thousand tonnes in 2014. The volumes from Honduras and Senegal only a decade ago are negligible compared to the current export to the EU.

Tips:

- Consider using the established trade routes and finding an importing partner in the Netherlands in order to supply mainland Europe or look for direct opportunities in the UK.
- Find a European importer at fairs such as Fruit Logistica.
- Fresh Plaza is a good starting point if you are looking for current relevant information in the market for fresh fruits and vegetables, including sweet potatoes.
Exports

**Figure 3: EU Export of sweet potato, in 1,000 tonnes**

![Graph showing EU export of sweet potato](image)

*Source: Market Access Database (Comext)*

**Figure 4: Export volume of sweet potato in 2014, share per EU country**

![Pie chart showing export volume share per EU country](image)

*Source: ITC Trademap, calculation by ICI Business*

**Interpretations and opportunities**

- Total EU exports (1.9 million euros) of sweet potatoes to non-EU countries in 2014 were negligible. The total intra-EU trade value increased from about 21 million euro to almost 52 million euros between 2010 and 2014.
- The Netherlands is the biggest trade hub in Europe for sweet potatoes. Main destinations are Germany, France, Finland, Sweden and the UK. The UK mainly re-exports sweet potatoes to Ireland. The rest is for domestic consumption.
- The Netherlands only exports sweet potatoes that have been imported from other countries. Spain, Portugal, Italy and Greece all produce sweet potatoes (together 56 thousand tonnes in 2013). Spain exports almost year-round to other European countries, although volumes are lower in July and August when stocks are falling and quality is decreasing.

**Tip:**

- Use the expertise of FrugiVenta, the Dutch trade platform for fresh fruit and vegetables, and find an importer in the Netherlands to supply Europe with one partner.
Production

Figure 5: Global production of sweet potato, in million tonnes

Figure 6: Production volume of EU suppliers, in million tonnes
(USA being the largest supplier to the EU and Jamaica the smallest)

Interpretations and opportunities

Worldwide production of sweet potatoes slightly exceeded 100 million tonnes in 2013. In general, only 50% of the world’s production of sweet potatoes is for human consumption. The remaining half is used for animal feed and seed conservation. Given the low prices for feed, the option to compete internationally with other feed ingredients such as maize and soy is non-existent.
Worldwide, sweet potatoes are almost exclusively produced for domestic consumption. Only a very small percentage (less than 1%) of production is exported to other regions in the world. Only 117 thousand tonnes were exported to the European market in 2014.

China is by far the largest producer of sweet potatoes with over 70 million tonnes, followed by Tanzania, Nigeria (both 3.5 million tonnes), Uganda (2.6 million tonnes) and Indonesia (2.4 million tonnes). The USA, the main supplier to the EU, produced 1.1 million tonnes in 2014.

Countries with a relative small production of sweet potatoes still have potential to supply the EU market. Smaller producing countries such as Israel, Honduras, South Africa and Senegal still manage to be successful in exporting to the EU market.

Sweet potatoes from the US generally have orange flesh. Sweet potatoes with red skin and white flesh, exported to the European market, mainly come from Israel, Honduras, China and Egypt.

In Europe, the production of sweet potatoes amounted to about 56 thousand tonnes in 2014. Spain and Portugal are the largest producers with respectively 24 and 22 thousand tonnes. Greece and Italy together produce another 11 thousand tonnes.

**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 of sweet potatoes.

**Consumption**

Figure 7: EU consumption of sweet potatoes in 1000 tonnes

Source: [ITC Tredamap, FAOSTAT, calculation by ICI Business]
Interpretations and opportunities

- In total, consumption of sweet potatoes in Europe was just over 160 thousand tonnes in 2013. Consumption increased in the last five years, almost completely based on imports.
- Sweet potatoes are popular with ethnic consumers and are still considered a minor product in Europe. However, they have also become a standard product in many European supermarkets reaching a larger variety of consumers. The increasing consumption of sweet potato offers opportunities to increase export to Europe.

What trends offer opportunities on the European market for sweet potatoes?

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 sweet potatoes.

Growing interest in sustainable vegetables: Consumption of fresh produce 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.

Tip:
- Check the Global Social Compliance Program (GSCP) website for more information about social and environmental conduct.

Attention to health and organic food: Consumers in Europe are becoming more aware of health issues and pay more attention to their diet. Sweet potatoes are high in vitamins and offer a healthier alternative to regular potatoes. Thanks to the increased attention to health and environment, there is also a growing interest in organically produced sweet potatoes. The demand for organic sweet potato is growing, but the supply volume and quality is relatively volatile.
More ethnic food in supermarkets: More and more shelf space within the European retail is given to ethnic food. This involves niche and special products, often with Asian origins, being offered to European consumers. While consumers are becoming more accustomed with these type of vegetables, the demand for sweet potato will increase as well. Large retailers prefer larger suppliers because of supply certainty and compliance with quality requirements.

Tips:
- Work together in your country as a sector in order to supply larger trade channels.
- As many European consumers are prepared to try ‘new’ products, contribute to promotional initiatives of importers, for example with recipes, communication of health benefits or instructions on how to prepare sweet potatoes.

Taste is important: For European consumers, taste is of growing importance. The taste of sweet potato stands out from other tubers and potatoes and can be a unique selling point to the consumer.

Tip:
- Make sure that supply chain logistics and transport processes do not affect product taste in any significant way.

What requirements should fresh sweet potato 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 sweet potato, 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.

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:
a) Documentary checks
b) Identity checks
c) 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 vegetables, including sweet potato, selecting the product code: 07142010

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
sweet potatoes 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). 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 sweet potatoes. 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 and discuss with your buyer which additional certificates are required. These requirements vary between countries and market segments.

**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 sweet potatoes is still 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 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 sweet potatoes 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 sweet potato 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 sweet potato 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 sweet potato.

**Company competition:** Rivalry is fierce in the trade of vegetables, so suppliers of fresh vegetables to European retailers are not in a position to argue about the rules of the game. Buyers will switch easily to other suppliers if expectations are not met. However, in Europe sweet potato is not a main vegetable for which fierce competition is common and the local production is not sufficient to meet the demand. This slightly improves the position of exporters from developing countries.

**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:** Inclusion of ethnic vegetables in the regular supermarket assortments stimulates the diversity of vegetable consumption in the EU, offering opportunities for products such as sweet potato. Sweet potato competes with regular potatoes, which are cheaper but also less exclusive.

**Tips:**
- Contact an experienced importer before entering the European market, especially if 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.
- Try not to 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 sweet potatoes?

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 fresh sweet potatoes are marketed in Europe.

**Figure 9: Market channels for Fresh Fruit and Vegetables in the European market**

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<th>Importer/ wholesaler</th>
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<th>Market segments</th>
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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.

Tip:
- Make sure your standards are sufficient for the supply to supermarkets. See buyer requirements and assessment tools in the section above.

What are end market prices for sweet potato?

Figure 10: Consumer price breakdown of sweet potato

![Diagram showing the breakdown of consumer prices for sweet potato across production & export, shipment, import & distribution, and retail, with percentages of 27%, 10%, 15%, and 48% respectively.]

Consumer prices for fresh sweet potato vary between 1.5 and 2.5 euros per kilo. Organic sweet potato is sold for more than double the price.

Tip:
- Find information about consumer prices in online shops or assortments of supermarket chains such as Tesco, Albert Heijn or Carrefour (search 'patate douce').

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
- ITC - International Trade Centre of WTO and UN - http://www.intracen.org/

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:
Statistics and sector information:

- Fruitrop - [http://www.fruitrop.com](http://www.fruitrop.com) (publication of CIRAD)
- Freshfel - [http://www.freshfel.org](http://www.freshfel.org)
- Freshplaza - [http://www.freshplaza.com](http://www.freshplaza.com)
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