CBI Product Factsheet:

Jams, Jellies, Purées and Marmalades in Europe
**Introduction**

Europeans love eating jams, jellies, purées and marmalades, especially as part of their breakfast. Although the most popular products in Europe are made from fruits grown in Europe, manufacturers are increasingly importing purées from abroad. This product factsheet provides you with information concerning the product specifications, statistics, market trends and competitiveness of Jams, Jellies, Purées and Marmalades in the European market.

**Product description**

**Product Definition**

Jams, Jellies, Purées and Marmalades are fruit products obtained by processing and cooking fruit. Purée serves as an ingredient for end products such as jam. The substance is more or less gel-like, depending on the amount of pectin added. Of these products, the majority of the consumption concerns jams. This product factsheet covers general information regarding the market for Fruit Jams, Jellies, Purées and Pastes in Europe. This product category also includes jams, citrus fruit jams and homogenised preparations (e.g. plum purée). The trade data used in this fact sheet is based on the Harmonized System (HS). HS is an international nomenclature for the classification of traded products developed by the World Customs Organization by means of a six-digit code system. See Table 1 below for the corresponding codes for the products taken into account in this Product Factsheet. Note that the statistics used in this product factsheet do not differentiate between bulk and finished products. Moreover, a lot of the bulk ingredients used in jam preparations belong to different sectors within the classification system, such as frozen or fresh fruits. CBI also offers insights into these sectors – please take a look at the website and select the appropriate market sector.

**Table1: Main codes for products in jams, jellies, purees and marmalade product group**

<table>
<thead>
<tr>
<th>Number</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>200710</td>
<td>Homogenized preparations of fruits/nuts, obtained by cooking, whether/ not containing added sugar/other sweetening matter</td>
</tr>
<tr>
<td>200791</td>
<td>Citrus fruit preparations (excl. homogenized), obtained by cooking, whether/not containing added sugar/other sweetening matter</td>
</tr>
<tr>
<td>200799</td>
<td>Fruit Preparations (excl. citrus fruits; excl. homogenized), obtained by cooking, whether/not containing added sugar or sweetening</td>
</tr>
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</table>

**Product Specification**

The trade flow of Jams, Jellies, Purées and Marmalades to Europe mainly concerns bulk products which serve as an ingredient for and are subsequently processed into consumer products, such as jams or marmalades or end products. A full and more detailed product definition can be found in Tailored Market Intelligence studies.

- Jam is the product brought to a suitable consistency by cooking and addition of sugar and generally a thickener such as pectin, made from the whole fruit, pieces of fruit, fruit pulp or fruit purée.
- Jelly is made from the fruit juice.
- Marmalade is prepared by cooking fruit to obtain a semi-liquid or thick liquid. Generally sugar is added.
- Purée is the edible part of the whole fruit, if appropriate, less the peel, skin and seeds pips, which has been reduced to a purée by sieving or other processes.

**Labelling**

Under regulations on providing food information to consumers, food labelling must contain certain information. For bulk products, it is permissible to include some of the mandatory information in the accompanying commercial documents rather than on the external packaging. Please ensure that a minimum amount of information always appears on the external packaging:

- name of the product (naming of Jams, Jellies, Marmalades and Chestnut puree is subject to specific rules laid down in Directive 2001/113/EC; The basic rules in this Directive are amended by Directive 2004/84/EC and Regulation (EC) No 1182/2007; batch identification;
- name and address of the manufacturer, packer, distributor or importer;
- date of minimum durability or ‘use by’ date and
- storage instructions.

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1 The EU Export Helpdesk provides you with a twelve-digit code system. This classification is preferably used when doubting the applicable tariffs, but can be used for a detailed insight into the Harmonized System.
However, batch identification, and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark, provided such a mark is clearly identifiable with the accompanying documents. Other mandatory food information must be noted in the commercial documents:

- List of ingredients (in descending order of weight);
- Net quantity (metric);
- Place of origin or provenance if failure to give such particulars might mislead the consumer;
- Instructions for use should be included to enable appropriate use of the foodstuff;
- Nutrition declaration

For more information, see Directive 2000/13/EC which lays down the general regulations relating to the labelling, presentation and advertising of foodstuffs. As from 13 December 2014, this Directive will be repealed and replaced by the new Regulation on the provision of Food Information to Consumers (1169/2011/EC).

In addition, the labelling of consumer products must include the following information (see Legislative requirements, Directive 2001/113/EC):

- fruit content by including the words 'prepared with X g. of fruit per 100 g;
- total sugar content by including the words 'total sugar content X g. per 100g.' (if no nutrition claim is made for sugars on the labelling pursuant to Directive 90/496/EEC)
- residual content of sulphur dioxide where it is exceeds 10 mg/kg.

Packaging

Although consumer products are mainly sold in glass jars, bulk products are packed differently (e.g., in cartons, drums, octabins, containers or tanker trucks). The advantage of purees is that less product needs to be transported and the product itself is stable and does not require the sophisticated logistics needed for fresh products. This is also an advantage compared to frozen products, which obviously have to be kept in frozen conditions, leading to expensive logistics.

Processing

The retail sector is the largest sales channel for the finished products of Jams, Jellies, Purées and Marmalades. In addition to the retail trade, the imported products are used in the bakery, ice cream and dairy industries. Manufacturers use all kinds of varieties of fruit products as ingredients to produce the finished products: aseptically packaged fruit, frozen or Individually Quick Frozen (IQF), purée and even fruit pulp. With regard to the latter, EU legislation stipulates that 'extra jam' may not be manufactured from purée but, rather, that pulp has to be used.

Quality

The quality of fruit (and non-fruit) ingredients determines the quality of the finished jelly or jam to a great extent. Information on quality requirements for each fruit and vegetable can be found in the Codex Alimentarius ("Food code of the WHO and FAO") and in the General Marketing Standards of Regulation (EC) 543/2011. Practically all fruits are suitable as a raw material for puree. Manufacturers usually add essence to their product to enhance flavour and odour, i.e. to add a "bouquet". Essence is usually concentrated and designated as "2X", "4X", etc. The name of the product can vary depending on fruit content, which is regulated by Directive 2001/113/EC. Products with higher fruit content can be marketed with labels such as: extra jam, high fruit jam or extra jelly.

Flavour

Europe's most popular flavours are red fruits, especially strawberry. Other popular flavours include citrus fruits, raspberry, tropical fruits (apricot) and cherry. Typical citrus fruits used for marmalade are (Seville) oranges and lemons. Marmalades are becoming more diverse these days, as can be seen from the "The World’s Best Amateur Marmalade Maker" contest. In 2015 the winning flavours were orange and lemon marmalades with interesting additions such as sherry or mojito.

See the Codex Standard for Jams, jellies and marmalades (CODEX STAN 296-2009) for basic ingredients and other permitted ingredients - requirements for individual fruits and vegetables.

Buyer requirements

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.

Legal requirements are a must – food safety and informing consumers correctly

Here you can find requirements you must meet when marketing your products in the EU. Pay attention to the indications of which materials/products are concerned per requirement described. The following ‘musts’ apply to jams, jellies, purées and marmalades and uses listed here:

- Food safety and health control
- Contamination
- Composition
- Labelling
- Food contact materials

Food safety: Traceability, hygiene and control

Food safety is a key issue in EU food legislation. The General Food Law is the legislative framework regulation for food safety in the EU. To guarantee food safety and allow appropriate action in cases of unsafe food, food products must be traceable throughout the entire supply chain and risks of contamination must be limited. An important aspect for controlling food safety hazards is defining critical control points (HACCP) by implementing food management principles. Another important aspect is subjecting food products to official controls. Products that are not considered safe will be denied access to the EU.

Tips:
- Search in the EU’s Rapid Alert System for Food and Feed (RASFF) database to see examples of withdrawals from the market and the reasons behind these withdrawals.
- EU buyers will often ask buyers to implement a food (safety) management system based on HACCP-principles (see under Common requirements).
- Read more about HACCP and health control in the EU Export Helpdesk
Control of food imported to the EU

In the event of repeated non-compliance, specific products originating from particular countries can only be imported under stricter conditions, e.g. accompanied by a health certificate and analytical test report. Products from countries that have shown repeated non-compliance are put on a list included in the Annex of Regulation (EC) 669/2009. At the moment frozen and dried fruits and vegetables (pesticide residues) and groundnuts (aflatoxin) from different countries (e.g. Brazil, India, Ghana, Thailand) are on the list.

Tips:
- To help you answer key questions about health control refer to the guidance document of the EU.
- Check if there are any increased levels of controls for your product and country. Read more about health control on the EU Export Helpdesk website.

Avoid contamination to ensure food safety

Contaminants are substances that may be present as a result of the various stages of growing, processing, packaging, transport or storage. The different forms of possible contamination of jams, jellies, purées and marmalades are:
- Heavy metals: there are restrictions for lead, cadmium and tin (see section 3 of Annex of Regulation (EC) No 1881/2006).
- Pesticides: 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.
- Foreign matter: contamination by foreign matter like plastic and insects are a threat when food safety procedures are not carefully followed.

Tips:
- For information on safe storage and transport of processed fruit and vegetables and edible nuts go to the website of the Transport Information Service.
- Check the European Commission’s factsheet on food contaminants "Managing food contaminants: how the EU ensures that our food is safe".
- Read more about contaminants in the EU Export Helpdesk.
- Irradiation is a way to combat microbiological contamination but this is not allowed by EU legislation for processed fruit and vegetables and edible nuts.
- To find out the MRLs that are relevant for your products, you can use the EU MRLdatabase in which all harmonised MRLs can be found. You can search for your product or pesticide used and the database shows the list of the MRLs associated with your product or pesticide. Read more about MRLs in the EU Export Helpdesk.
- A good way to reduce the amount of pesticides, is applying integrated pest management (IPM) which is an agricultural pest control system that uses complementary strategies including growing practices and chemical management.
- Refer to the Buyer Requirement module on natural colour, thickeners and flavours for more information.
- E-numbers indicate approval by the EU. To obtain an E-number the additive must have been fully evaluated for safety by the competent food safety authorities in the EU (EFCH).
- Read more about legislation on authorised food additives and flavourings under general conditions of preparation of foodstuffs.

Product composition

Product can be rejected by buyers and EU customs authorities if they have undeclared, unauthorised or excessive levels of extraneous materials. There is specific legislation for additives (e.g. colours, thickeners) and flavourings that lists which E-numbers and substances are permitted. If you want to add vitamins you will have to know which vitamins (see Annex I) and sources, vitamin formulations and mineral substances are allowed (see Annex II). Product specific legislation regarding composition applies to fruit jams, jellies, marmalade and sweetened chestnut purée. The Directives indicate which raw materials and additives may be used.

Labelling

If you are supplying consumer labelled product (in for example cans, jars) you will have to take labelling requirements laid down in EU Regulation 1169/2011 into account. Labels should inform consumers about composition, manufacturer, storage methods and preparation. In addition, specific provisions have been adopted for fruit jams, jellies, marmalade and sweetened chestnut purée in order to improve consumer information.
Nutrition and health claims

Nutrition and health claims suggest or indicate that a food has a beneficial characteristic. They cannot be misleading. Therefore, only EU approved nutrition and health claims can be made. If new nutrition or health claims are made these have to be approved in advance by the European Food Safety Agency (EFSA).

Allergens

Pre-packed products that contain allergens have to be labelled in such a way that it is clear to consumers that they contain allergens.

Food contact materials

Specific health control provisions apply to consumer packaging materials that come into contact with food (e.g. cans, jars). Food contact materials must be manufactured so that they do not transfer their constituents to food in quantities that could endanger human health, change the composition of the food in an unacceptable way or impact upon the taste and odour of foodstuffs. Tin present in cans has been known to leach into the food. This has been particularly shown to occur in the case of acidic foodstuffs. For canned foods, EU regulations set out a maximum level of tin that can be found in food (see regulations on contamination).

Full overview of requirements for jams, jellies, purées and marmalades:

For a list of requirements consult the EU Export Helpdesk where you can select your specific product code (for jams, jellies, purées and marmalades 200710, 200791, 200799).

Common requirements: food safety management is crucial, addressing sustainability is gaining ground

Food Safety Certification as a guarantee

As food safety is a top priority in all EU food sectors, you can expect many players to request extra guarantees from you in the form of certification. Many EU buyers (e.g. traders, food processors, retailers) require the implementation of a (HACCP-based) food safety management system. The most important food safety management systems in the EU are BRC, IFS, FSSC22000 and SQF. Different buyers may have different preferences for a certain management system, so before considering certification in line with one of these standards, you are advised to check which one is preferred (e.g. UK retailers often require BRC and IFS is more commonly required by other European retailers). All the aforementioned management systems are recognised by the Global Food Safety Initiative (GFSI), which means that they should be accepted by major retailers. However, in practice some buyers still have preferences for one specific management system.
Corporate responsibility

EU buyers (especially large ones in western and northern EU countries) are paying increasing attention to their corporate responsibilities regarding the social and environmental impact of their business. This also affects you as a supplier. Common requirements include the signing of a suppliers’ code of conduct which states that you conduct business in a responsible way, i.e. you (and your suppliers) respect local environmental and labour laws, avoid corruption etc. Furthermore, importers may also participate in initiatives such as the Ethical Trading Initiative or the Business Social Compliance Initiative. These initiatives focus on improving social conditions in their members’ supply chains. This implies that you, as a supplier, are also required to act in line with these principles.

Tips:

- EU market entry preparation is likely to include implementing a food safety management system and it is therefore important to familiarise yourself with them.
- If you plan to target one or more markets, check which specific food safety management systems are most commonly requested. In any case choose a management system that is GFSI approved.
- Read more on the different Food Safety Management Systems in the Standards Map.

Niche requirements: a growing market for certified products

Fairtrade Certification

Fairtrade products are produced with extra focus on the social conditions in the producing areas. Having your products certified is the most far-reaching way to prove your business performance with respect to social conditions in your supply chain. After certification by an independent third party, you may put the Fair Trade logo on your product. In general, premium prices are paid for fair trade products. Although growing, the market for Fair Trade certified processed fruit and vegetables and edible nuts is still a niche market.

Tips:

- Check the Fair Trade Standards for small producer organisations.
- Consult the Standards Map database for more information on the Fair Trade label.

Organic, niche market

Organic processed fruit and vegetables and edible nuts are produced and processed by natural techniques (e.g. crop rotation, biological crop protection, green manure, compost). Although growing, the market is still relatively small. To market processed fruit and vegetables and edible nuts in the EU as organic, they must be grown using organic production methods which are laid down in EU legislation, and growing and processing facilities must be audited by an accredited certifier. Only then may you put the EU organic logo on your products. Although there is an EU-wide system for the regulation of organic farming, well-established national and private logos can continue to be used on product labels (e.g. Soil Association in the UK, Naturland in Germany).
Tips:
- Implementing organic production and becoming certified can be expensive. In the current market the return on investment may not be high. On the other hand it can increase yields and improve quality.
- Check the Soil Association standard for Food and drink to get an idea of the requirements of organic production.
- Consult the Standards Map database for the different organic labels and standards.

Trade Statistics

With respect to Processed Fruit and Vegetables, general information and figures on production and trade developments in the EU market are provided in CBI Tradewatch. This section provides more detailed statistics for Jams, Jellies, Purées and Marmalades in Europe.

Trade: imports and exports

Figure 1: Imports of Jams, Jellies, Purées and Marmalades to the EU, 2010-2014, in € thousand

Data source: ITC Trademap

Figure 2: Breakdown of EU imports of Jams, Jellies, Purées and Marmalades in the EU, 2014, in thousand tonnes

Data Source: Eurostat
Figure 3: Largest external suppliers of Jams, Jellies, Purées and Marmalades to the EU in 2014, in € thousand

Data source: Trademap

Figure 4: Exports of Jams, Jellies, Purées and Marmalades to the EU, 2010-2014, in thousand tonnes

Data source: Eurostat

Figure 5: Breakdown of EU exports of Jams, Jellies, Purées and Marmalades in the EU, 2014, in thousand tonnes

Data Source: Eurostat
**Figure 6:** Largest external EU export destinations for Jams, Jellies, Purées and Marmalades to the EU in 2014, in € thousand

**Data source:** Trademap

**Analysis and interpretation**

EU imports of jams, jellies, purées and marmalades grew by 9% in value over the last five years, reaching €1.05 billion in 2014. Imports from DC countries grew at a faster rate of 19%.

**Tip:**
- Imports from developing countries are increasing, thus providing opportunities for new entrants.

The EU market for jams, jellies, purées and marmalades is concentrated and the three largest importers (France, Germany and the Netherlands) account for almost half of the total imports.

The EU country with the highest import growth over the last five years is the Netherlands, which has 22% growth of imports of different jams, including apple purées, nut purées and mixtures. A very high increase in imports was recorded for nut purée from Turkey. Other countries with high import growth were Austria (19%) and Portugal (14%).

**Tips:**
- Consider exporting to the EU markets with the highest import growth, such as the Netherlands, Austria or Portugal. Also learn from the EU export competition and consider diversification of exports to the other countries with high import growth, such as Brazil, China, Norway or Saudi Arabia.
- Innovative European flavour mixtures are increasingly popular among EU consumers. Europe is an attractive market for DC’s, because consumers are open to new, exotic flavours as well. Due to climate conditions, ingredients for these products are rarely grown in Europe.
- Several ports are available for entering Europe, the major ones being Rotterdam in the Netherlands, Antwerp in Belgium and Hamburg in Germany.

DC countries with increasing exports on the EU market over the last five years are: Mali, Mexico, India and China.

Total EU exports of jams, jellies, purées and marmalades amounted to €1.4 billion in 2014. Exports grew during the period under review by 9%.

Most of the exported products go to other European countries. When exported outside Europe, the Russian Federation and United states are the main partner countries.

In the range of the top EU external export destinations, the largest export growth over the last five years was in Brazil (23% growth rate), China (22%), Norway (17%) and Saudi Arabia (17%).
Production and Consumption

Figure 7: Production of Jams, Jellies, Purées and Marmalades in the EU, 2009-2013, in € million

Data source: Eurostat PRODCOM

Figure 8: Consumption of Jams, Jellies, Purées and Marmalades in the EU, 2009-2013, in € million

Data source: Eurostat PRODCOM

Production

Several countries in the EU produce Jams, Jellies, Purées and Marmalades. By far the largest producer is Germany. Other significant producing countries are Spain, Italy, United Kingdom and Poland, with the latter’s share rising, in particular.

Tips:
- Consider the biggest net importers for serving the domestic market. European consumers do not tend to distinguish between imported products and products of European origin (due to their expectations that the food they buy is produced in line with EU safety regulations).
- Find a reliable intermediary or importer who can sell your products to the larger industries for a good price. Involve European experts in setting up your business. For example, CBI or the Netherlands senior experts network PUM could help with the implementation of many business aspects. See the websites: www.cbi.eu or www.pum.nl.

Tips:
- Products with a short ingredients list are generally considered to be most healthy. Therefore, DCs can facilitate clean labelling by not adding any additives to their product (or adding as few as possible). See for example this website for more information concerning clean labelling.
- EU legislation and clean labelling do not allow all kinds of additions to improve colour. DCs can improve flavour and colour by using fruit varieties which have a strong flavour and deep colour intensity, and by using fruits that have been harvested at exactly the right ripening stage.
Consumers in Europe are increasingly looking for healthy products. In line with this, the manufacturer’s aim should be to eliminate as many ingredients as possible. This is called clean labelling. Clean labelling is generally accepted as being the removal of chemical-sounding ingredients such as artificial food additives and E-numbers as well as the reduction of salt or fat in order to create a simpler ingredients list.

Sustainability is gaining solid ground among manufacturers and, to a large extent, companies are committing themselves to sustainability in general and more specific areas, such as not harming the environment or improving working conditions. Top European producers include Andros, Hero Group, Albert Menes, Hain Celestial (owner of the Hartley’s brand) and Zentis.

**Tip:**
- DCs can contribute to sustainability by using less or renewable energy, less water, reducing waste, rejecting child labour and improving worker’s rights.

The most important flavour, red fruit, is almost completely sourced within Europe and the Baltic states.

Most jam in the EU is produced from frozen or aseptic fruit purée. This preference is explained by the product’s (long) durability which enables year-round supplies to manufacturers.

Flavour and colour are major quality characteristics of jam. The flavour should resemble the aroma of the fresh fruits as closely as possible and consumers generally prefer a clear colour (not pale).

Finally, this market is characterised by its size and culture: it is a relatively small and informal market.

**Tips:**
- The market for jams, jellies and purées is small and personal, so trustworthiness is key.
- Consider the jams, marmalades and jellies industry, as it is the important import segment for raw materials such as frozen fruit, fruit purées and concentrated fruit juices.

**Consumption**

In terms of consumption, the majority of Jams, Jellies, Purées and Marmalades are consumed throughout Europe, with the majority consumed in Western Europe. France is the leading country in terms of consumption, while Germany and the United Kingdom are two other major markets. Retail sales of jams and preserves in Western Europe are expected to grow slightly each year up to 2016 (AAFC, 2011).

Jams, Jellies, Purées and Marmalades are naturally linked to breakfast and bread, like many other spreads (e.g. honey, chocolate and nut-based spreads).

The appeal of jam is experiencing a slight decrease in the United Kingdom (Mintel, 2013). In the UK, one retailer has launched a series of jams based on popular fruit combinations. This will help the retailer to spread the message to young people that jam is not just the preserve of the older generation. Marmalade is suffering from this image even more.

**Tip:**
- Traditionally, consumer preferences are conservative. However, due to migration and travelling, consumers are becoming more interested in new (exotic) flavours and/or blends.

Diversified products like jams with stevia (a natural sweetener) or a higher fruit content are benefitting from the ongoing consumer health trend and demand for quality products. There is also a shift towards seasonally supplied products which enable seasonality to be enjoyed through jams.

**Tip:**
- Health considerations help sales of jams that have high fruit content and/or are sugar-free.
Macro-economic statistics

Figure 9: Real GDP, 2014-2016, % change from previous year

Source: Eurostat (2015)

Figure 10: Real private consumption expenditure, 2014-2016, % change from previous year

Source: Eurostat (2015)

Economic indicators are promising

Predictions of GDP and private consumption expenditure are important indicators for the European jams, jellies, marmalades and purées market.

Between 2014 and 2016, European GDP and private consumption expenditures are expected to increase. Especially in emerging markets, an increase in GDP creates room for this type of spending, which potentially opens an opportunity for DC exporters of jams, jellies, marmalades and purées. Due to saturation, growth in consumption will be moderate for mature markets.

Tip:
- Monitor GDP, private consumption expenditure and the housing market, because when these are positive, expenditure on jams, jellies and marmalades is expected to increase.

Market Competitiveness

With respect to Processed Fruit and Vegetables, general information about market competitiveness in the EU market is provided under CBI Market Competitiveness.
Analysis

**Buyer power:** The retail sector is the largest sales channel for the finished products of Jams, Jellies, Purées and Marmalades. In addition to retail, the products are used in the bakery, ice cream and dairy industries. Retail control and requirements are increasing. The retail industry (i.e. supermarkets) will put more pressure on the price asked by DC exporters through direct or indirect sourcing. This is due to the fact that the retail market is characterised by being principally focused on price and sales volumes. In addition, the requirements of retailers and food manufacturers are rising. More specifically, retailers are increasingly demanding a high level of traceability and food safety.

**Tips:**
- As an exporter, you also have to comply with buyer (retail) requirements. Check with your buyer to determine the requirements and suitable standards for your product.
- The global rise of raw material prices in this sector means that, as a DC exporter, you will be facing more and more competition. In addition to price, make sure you offer correct product specifications with regard to natural (and added) ingredients.

**Threat of new entrants:** More and higher product requirements due to a shift towards more sustainable (i.e. environmentally friendly and socially acceptable) products in the industry will make market entry more difficult in the near future. Nevertheless, it is still relatively easy to enter at the moment. Private label products in the spreads market are predicted to continue gaining market share compared to branded products. There is space left for producers who meet consumer needs with innovative products. European consumers are interested in exotic flavours and willing to incorporate them into their daily diets. In addition, consumers prefer healthy, sweet spreads without compromising on taste and this can be achieved with the inclusion of natural ingredients and fewer artificial sweeteners. Diabetic and sugar free/low sugar demands are developing, as is the use of herbs and spices.

**Tips:**
- Important indicators for entering a new market are buyer, investment and volume requirements and also the necessary level of knowledge. Also, certification systems can help you enter and optimise your business for the European market. For example, you could go for organic certification and thereby add value to your jam products and address the interests of European buyers.
- Make sure you do not ‘miss the boat’ due to neglecting consumer trends and ignoring competitors who are capitalising on trends such healthiness. Make sure you do not forget to meet the wishes of businesses, such as clean labelling.

**Threat of substitute products:** Consumers use Jams, Jellies and Marmalades mainly for spreading on bread. Substitutes for Jams, Jellies, Purées and Marmalades include other spreads such as chocolate and nut-based spreads. Younger consumers, in particular, are switching to these spreads (because of the traditional image of jams). Another group of substitutes are the cheaper alternatives within the product category, such as private label products. The purchasing power of consumers is not likely to increase very much in the short term, thus making cheaper substitutes more attractive to buyers.

**Tips:**
- Identify the trends for your substitute products. Are they declining or increasing in sales and if so, why? Business annual reports or sector studies in general can provide further insights into these developments.
- Besides focusing on trends in substitute products, the challenge is also to increase the frequency of usage or broaden the moments of usage for your own products.
- Particularly with regard to Jams, Jellies, Purées and Marmalades, the challenge is to overcome the traditional image of the products among younger consumers.

**Bargaining power of suppliers:** Raw material shortages will allow for more bargaining power among suppliers. Exotic fruits cannot be produced (sufficiently) in Europe, so they need to be imported from other countries. This can be seen as an opportunity for exporters, though the position of the supplier vis-à-vis the exporter will also be stronger.

**Tip:**
- As a DC exporter, you have unique products at your disposal, i.e. fruits that cannot be grown in Europe. You can use this to strengthen your position, in addition to instruments like long-term contracts, partnerships and joint ventures. These are all possibilities for obtaining a better position in the EU market, among other exporters and in relation to your direct competitors.
**Degree of rivalry:** Competition will increase, especially in the medium and low end of the market. Rivalry will also increase due to new developments in information technology. Internet sales will increase, for example, making competition in the EU market more intense. This will probably result in sales promotions focusing on price and volume. Popular internet sales at the moment involve processed fruits from regionally or locally produced jams and jellies. This means that fruit from DCs is less in demand in this market, unless it is a tropical fruit which cannot be grown locally.

**Tips:**
- Try not to compete on price alone, but on added value and differentiated products. Try to find market niches matching the current sustainability and health trends. Maybe even enter the market with a product produced on your own.
- As a DC exporter, you must recognise that sugar content is a major issue in Europe nowadays. Both governments and industries are seeking improvements. Essentially, this trend poses an opportunity to you as an exporter. Conduct research to minimise the sugar content in your fruit products. If you have (documented) low-sugar products available, market this fact positively to attract buyers.
- Examine whether the Internet could present an opportunity for you to sell small quantities of specialised products from DCs to speciality shops in Europe.

**Useful sources**

Export and market entry support:
http://www.cbi.eu/
http://exporthelp.europa.eu/thdapp/index.htm

Certification schemes:
http://www.isealalliance.org/
http://www.standardsmap.org/identify.aspx

Marketing and trade standards:
http://www.unece.org/trade/agr/standard/fresh/FFV-StandardsE.html
http://www.codexalimentarius.org/codex-home/en/

Statistics and sector information:
http://www.profel-europe.eu/
http://faostat.fao.org/
http://ec.europa.eu/eurostat
http://comtrade.un.org/