

The European market potential for tropical frozen fruit

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Growth in the European market for tropical frozen fruit is likely to be driven by changes in the consumption patterns of European consumers. An example of these changes is the increasing popularity of smoothies as a convenient and healthy breakfast option. Industry users — primarily the dairy, ice cream, and bakery industries — are creating innovative and healthy uses for frozen tropical fruit as ingredient. The Netherlands, Germany, France, Belgium, Poland and the United Kingdom offer opportunities for developing country suppliers.

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1. Product description

Frozen tropical fruit include a range of fruits preserved by a freezing process. Fresh, clean, sound and ripe fruit is used, whether native fruit or grown in tropical regions (the climatic zone surrounding the Equator). Due to climatic conditions, tropical fruit cannot be produced in Europe, except in isolated cases, such as the case of the subtropical islands that belong to EU countries, such as the Canary Islands (Spain) and Madeira (Portugal).

Besides freezing, tropical fruit can also undergo other processing, such as washing, peeling, grading, cutting, blanching, deactivation of enzyme activity, etc., depending on the type of product. Frozen tropical fruit are used in fruit cocktails, smoothies, ice cream, desserts, jams, pastries, yogurts and beverages. Some tropical fruit is specifically used in the production of ethnic food, such as chutneys (frozen mango), guacamole (frozen avocado), aguas frescas (frozen soursop and other tropical fruit) and Ponche Navideño (guavas).

The freezing operation must be carried out in such a way that the freezing process from the surface to the centre of the product occurs quickly. The quick-freezing process is finished when the temperature in the centre of the fruit reaches -18°C .

Quick frozen tropical fruit can be presented as:

- Individually quick frozen (IQF)
- Block frozen
- Crushed fruit
- Cut in different shapes (chunks, dices, slices, halves, etc.)
- Combination of different styles
- Tropical purees, juices and concentrates traded in frozen form

This study covers general information regarding the market of frozen tropical fruit in Europe, which is of interest to producers in developing countries. Please see Table 1 for the codes and products that are used for statistical analysis. However, the range of frozen tropical fruits is wider than shown in statistical analyses.

Table 1: Products and relevant CN or HS codes in tropical frozen fruit

Combined Nomenclature Number	Product
08119085	Frozen tropical fruit (guavas, mangoes, mangosteens, papayas, tamarinds, cashew apples, lychees, jackfruit, sapodilla plums, passion fruit, carambola, pitahaya, coconuts, cashew nuts, brazil nuts, areca "betel" nuts, cola nuts and macadamia nuts)
08119011	Frozen tropical fruit with a sugar content exceeding 13% by weight
08119031	Frozen tropical fruit with a sugar content lower than 13% by weight

Picture 1: Frozen mango cubes



Source: Flickr

Picture 2:



Source: Flickr

Picture 3: Frozen pitahaya (dragon fruit)



Source: Alibaba

Picture 4: Frozen papaya



Source: Alibaba

Tip:

For the frozen tropical purees market, see our [study about tropical purées in Europe](#).

2. What makes Europe an interesting market for tropical frozen fruit?

Europe is a large importing region of tropical frozen fruit, accounting for a share of 45% of the total world's imports of tropical frozen fruit. European imports of tropical frozen fruit have increased by 6.4% on average per year in value over the 2015–2019 period. Imports from European and developing countries are somewhat equal in value, each responsible for approximately 50% of the total European imports of tropical frozen fruit.

Imports of tropical frozen fruit are expected to continue to increase in the coming years at a high annual growth rate probably beyond 5%. This expected increase will be driven by the increasing demand for healthy food, consumer interest in more diverse menus including exotic fruits, and convenience. The popularity of smoothies as part of breakfasts and other eating opportunities is a specific driver that combines all of these trends in one.

However, the COVID-19 pandemic has greatly affected consumer buying behaviour, also affecting demand in the short term. This effect was not taken into account in this study. For more information on this topic, read our [news item on the influence of COVID-19 on the processed fruit and vegetables market](#).

This section describes imports in value terms only. Figures on volumes are not reliable, so they are not included in this study.

Between 2015 and 2019, European imports of tropical frozen fruit grew every year on average by 6.4% to a value of €145 million in 2019. With an annual average growth rate of 7.9%, imports from European countries have increased faster compared to imports from developing countries (average growth of 5.9%). This is mainly caused by a large growth in 2016. Internal European trade consists of simple re-exporting of imported tropical frozen fruit. In addition, a large share of intra-European trade represents frozen tropical fruit with added sugar, meaning that after imports from developing countries European traders are adding value to imported products.

There is an upward trend in imports from developing countries, which peaked especially in 2019 at 11% growth in relation 2018. The total value of frozen fruit imports from developing countries to the EU was €73 million, which is 50% of all EU frozen fruit imports. This is explained by the fact that only part of the imports from developing countries is consumed directly in the domestic market of the European country of arrival in the EU. The other part is intra-European trade, where companies re-export the imported tropical frozen fruit to other European destinations.

Most of the tropical frozen fruit imported into Europe is used by the fruit processing industry, while smaller shares are destined for retail and food service channels. The Netherlands, Germany, France, Belgium, Poland, and the United Kingdom are the largest European markets for tropical frozen fruit. However, the Netherlands and Belgium have positioned themselves more as a trade and processing hubs. Belgium is home to several large frozen fruit processing companies, and most of the tropical frozen fruit imported into Belgium is not sold within the country but re-exported or further processed.

Tip:

Read the CBI's [COVID-19 study](#) for additional recent market information.

3. Which European countries offer most opportunities for tropical frozen fruit?

Within Europe, the Netherlands and Belgium are important trade hubs with significant re-exports of imported tropical frozen fruit. In 2019, frozen fruit imports by both countries showed high growth rates. Poland and the United Kingdom import the least among the top-six leading importing countries; however, imports to both Poland and the UK showed high growth rates in the past five years, and hence both offer opportunities for new developing country suppliers. Other large European importing countries of tropical frozen fruit are Germany and France.

The Netherlands: the largest importer and a re-exporting country

The Netherlands is Europe's largest importer of frozen tropical fruit. The country's €27 million in imports account for almost 19% of total European frozen tropical fruit imports. In the past five years, Dutch frozen tropical fruit imports showed some variation, most likely caused by fluctuations in the main markets targeted by Dutch traders. Between 2015 and 2019, the average yearly growth was 2.6%, indicating an upward trend in recent years, after a -13% drop in 2017 over 2016.

Compared to the other leading importing countries and regions, Europe imports a large share of tropical frozen fruit sourced directly from developing countries: 83%. In the 2015–2019 period, the average annual growth of Europe's tropical frozen fruit imports was 2.2%. In 2019, the leading supplying country of tropical frozen fruit to the Netherlands was Peru, followed by India, Vietnam, and Belgium. Brazil is the developing country whose share of Europe's tropical frozen fruit imports is the fastest growing, but at just 3.9% it is still a relatively small share compared to other suppliers.

Although the Netherlands is a large importer of frozen tropical fruit, the country is not a large consumption market itself, since most of the imported volume is re-exported to other destinations. As such, the Netherlands is an important hub for tropical frozen fruit, responsible for 14% of the total European imports. The export of tropical frozen fruit from the Netherlands to other European countries has increased from €14 million in 2015 to €20 million in 2019, at average annual growth of 9.9%.

In the Netherlands, the consumption of tropical frozen fruit is boosted by the healthy eating trend and the popularity of [smoothies and juice bars](#) across the country.

Germany: Peruvian supplies almost double every year

The German tropical frozen fruit import value was €22 million in total in 2019, equivalent to 15% of total EU imports. German imports increased annually by 5.3% in value on average between 2015 and 2019, in spite of the 2019 6.6% drop with respect to 2018.

Compared to the Netherlands, Germany's imports of tropical frozen fruit from developing countries is relatively small. Some 52% of Germany's tropical frozen fruit import value in 2019 was sourced from developing countries. However, Germany's imports of tropical frozen fruit from developing countries have increased in the past five years at an average annual growth of 16%. In the other direction, Germany's imports from other EU countries showed a downward trend: -2.2% average annual growth. This movement indicates that Germany increasingly imports tropical frozen fruit directly from developing countries instead of through European re-exporting countries, like the Netherlands.

The leading suppliers of tropical frozen fruit to Germany in value are Peru and the Netherlands, accounting for a share of 25% and 24% respectively among Germany's total imports. India, Vietnam and Belgium follow with much smaller shares between 6.5% and 9.1%. The main supplier of tropical frozen fruit to Germany — Peru — is also the country whose share in German imports of tropical frozen fruit showed the highest growth in the past five years, since Peru's exports to Germany almost doubled in value year on year in this period.

Consumption of tropical frozen fruit in Germany is boosted by the healthy eating trend. German consumers are increasingly using tropical frozen fruit for home preparation of smoothies and in breakfast cereals and bowls. In order to make the preparation of smoothies more convenient, some German companies have introduced ready-to-blend mixtures.

German fruit ingredient companies manufacture different products with tropical frozen fruit. These companies are large users of tropical frozen fruit, supplying different market segments, such as dairy, ice cream, bakery, beverages, and other food industries.

Tips:

Find German traders of tropical frozen fruit on the website of the specialised German Association [Waren-Verein](#) and in the German company directory [Wer Liefert Was](#).

Stay up to date about the German frozen food market using the smartphone application [dti Publikationen](#) developed by the German Frozen Food Institute (in German).

France: intra-EU trade is dominating

In 2019, the French tropical frozen fruit market was somewhat similar in value to Germany. The French import value was €21 million in total in 2019, making up 14% of total EU tropical frozen fruit imports. This makes France Europe's third-largest importer of tropical frozen fruit, after French imports increased annually by 3.9% in value between 2015 and 2019.

As opposed to the Netherlands and Belgium, France does not source much tropical frozen fruit from developing countries; only 25% is imported from developing countries, meaning that the lion share comes from other European countries. With these figures, France is the country that shows the lowest share in tropical frozen fruit imports from developing countries. The average annual growth of developing countries was slightly negative (-0.2%), while imports from European countries was positive (5.3%).

The leading suppliers of tropical frozen fruit to France are the two European re-exporting countries, Belgium and the Netherlands, with a share of 29% and 26% of France's tropical frozen fruit imports respectively. Madagascar, Germany and India are the following important suppliers to France, although their shares are much smaller, varying from 5.9% to 7.4%. Madagascar showed the strongest growth in tropical frozen fruit exports to France over the last five years at almost 60% per year.

Looking at France's exports of tropical frozen fruit to the European market, value has almost doubled in the past five years, from €3.4 million in 2015 to €6.3 million in 2019 (+17% per year).

Tropical frozen fruit are increasingly used for the home preparation of smoothies. Because of that trend, producers are increasingly making ready-to-blend smoothie mixtures, such as the [smoothie mixtures](#) of Carrefour, France's leading French retailer. Private label products dominate French retail sales of tropical frozen fruit.

A large consumer of tropical frozen fruit in France is the bakery industry, which is using tropical fruit preparations as fillings for pastries, cakes, and other products. Those fruit preparations are made by specialised companies, such as [Valade Groupe](#), [Capfruit](#), or [Ponthier](#).

Tips:

Find a list of French frozen fruit companies on the [member directory](#) of UNILET.

If you are not from a French-speaking country, consider investing in French-speaking staff to facilitate entry to the French market for frozen fruit.

Belgium: trade hub for tropical frozen fruit

Like the Netherlands, Belgium does not consume most of its tropical frozen fruit imports locally, but instead re-exports tropical frozen fruit to other destinations. Belgium is a very concentrated market for frozen food, as the country is home to a small number of very large importers, which are also European market leaders, for example, [Crops](#), [Greenyard Frozen](#) (Pinguin Foods), and [Ardo](#). These specialised Belgian frozen food companies act as re-exporters, processors and suppliers to food retail, food service and industry segments across Europe.

Belgium's imports of tropical frozen fruit fluctuated between 2015 and 2019, the most significant drop in value happening in 2018: -13%. However, the flow recovered in 2019 (+20%) to a total value of €16 million. On average, Belgian imports of tropical frozen fruit increased annually by 2.6% in value in the past five years.

Belgium is the European country with the highest share of direct tropical frozen fruit imports from developing countries: 84%. Growth of tropical frozen fruit imports from developing countries was moderate in the 2015–2019 period at 3.2% per year. With an export value of €6.6 million and a share of 41% of Belgium's imports, Peru is the number one supplier of tropical frozen fruit to Belgium. Mexico (21%) and India (12%) rank second and third.

The Netherlands, the other main hub for tropical frozen fruit in Europe, also represents a relatively high share (6.6%) of Belgian imports of tropical frozen fruit.

As for exports to other European destinations, Belgium's export value increased from €13 million in 2015 to €18 million in 2019, at an annual average growth of 8.9%. Belgium is responsible for 12% of the total supply of tropical frozen fruit to Europe.

One of the drivers for the increased consumption of tropical frozen fruit is the home preparation of smoothies and the development of smoothie and juice bars. One of the leading suppliers of frozen smoothies solutions in Belgium is [Crops](#), which even organises lectures to produce innovative smoothie flavours in their Smoothie Academy development centre in Ooigem.

Poland: the strongest growth market

Poland's market for tropical frozen fruit had the highest average import growth in value over the last five years and the only one showing non-stop growth every year in the period. Polish imports of tropical frozen fruit increased from €5 million in 2015 to €13 million in 2019, an average increase of 24%, enough to push Poland's imports higher than those of the United Kingdom. This trend of growing imports of frozen tropical fruit is in line with Poland's development in the last decade into one of Europe's processing hubs for food and fruit products, such as juices, jams, etc.

Some 58% of Poland's tropical frozen fruit imports come from developing countries. Although this share is not as high as those of Belgium and the Netherlands, it is noteworthy because the average annual growth has been high. Polish imports of tropical frozen fruit from developing countries have increased 56% on average in the past five years. Intra-EU trade only increased with 7% on average and even showed a large drop (-29%) in 2019.

Peru is by far the largest supplier of tropical frozen fruit to Poland, exporting almost €4.9 million in value, which

account for 39% of Poland's imports. Peruvian tropical frozen fruit exports to Poland more than doubled every year in the last five years. Germany and the Netherlands are the second- and third-largest suppliers to Poland, with shares of 20% and 8.8% respectively.

The United Kingdom

The United Kingdom's imports of tropical frozen fruit increased from €8.0 million in 2015 to €12 million in 2019, at a strong average annual growth of 12%. The UK accounts for 8.6% of total EU tropical frozen fruit imports.

Developing countries and European countries have a somewhat similar share in supplying tropical frozen fruit to the United Kingdom: 49%. However, intra-EU trade is increasing at a much faster pace than imports from developing countries. Over the past five years, imports from European countries were up by 29% per year whereas the growth rate of developing countries was 6.5%.

The largest European suppliers of tropical frozen fruit to the United Kingdom are France (25%), the Netherlands (13%) and Belgium (8.7%), together accounting for a share of 47% of the UK's imports in value. In terms of direct imports, the United Kingdom sources mostly from Peru (14%) and Vietnam (11%). Among the tropical frozen fruit suppliers to the UK, France's exports grew the most in the last five years at an average annual growth rate was 85%.

Use of tropical frozen fruit in the UK is stimulated by the increasing consumption of smoothies. The retail segment is almost fully dominated by private label brands, as there is hardly any independent brand with a significant market share. As a result, innovation in the shelves comes from private label brands, such as ready-to-blend mixtures by [Love Smoothies](#) and [Pack'd](#). The British retail chain Waitrose has also developed [LoveLife](#) smoothie mixtures in cooperation with frozen food company Ardo UK. In light of the small participation of independent brands in food retail, it is rather striking that one of the most known smoothie brands in Europe, Innocent, is from the United Kingdom, although it is also the leading brand in British food retail as well.

Tips:

Learn more about tropical frozen fruit in the UK market by visiting the website of [British Frozen Food Federation](#).

See our study on [market statistics and the outlook for processed fruit and vegetables](#) for more information about general trade developments within the European processed fruit and vegetables sector.

Check trade statistics of your interest with the tools of ITC [TradeMap](#) and [Trade Helpdesk](#).

4. Which trends offer opportunities on the European tropical frozen fruit market?

Healthy foods are very popular among European consumers, who increasingly seek healthy alternatives that are convenient at the same time, such as smoothies at breakfast, as a meal replacement or as a snack. The industry is tapping into this demand by offering new products in line with the healthy food trend. There is an increasing demand for non-dairy, vegan, convenient and easy to prepare foods. All of these together are driving the demand for tropical frozen fruit in Europe.

Below is a summary of the trends for tropical frozen fruit specifically. To find out more about general trends, read our study [Trends in the European Processed Fruit and Vegetables Market](#).

Popularity of smoothies

Smoothies have become a very popular option for breakfast or snack in Europe. Smoothies often consist of blended fruit purée with added milk, yogurt, water or fruit juice. The possibility of adding various ingredients (such as nuts, fibres, supplements, kefir, and yogurt, among others) helps to make smoothies a popular meal replacement for European consumers.

Because of their busy lifestyles, some European consumers use home food processors to make quick smoothies for breakfast, as they normally do not take too much time to prepare. Many European frozen fruit companies are launching ready-to-blend frozen fruit mixtures with reduced preparation times. This trend, together with the development of juice bars, boosts the demand for ready-made frozen smoothies using different ingredients and flavours and more often than not including tropical frozen fruit.

Many celebrity chefs also promote new smoothie variations on TV shows and cookbooks. The Belgian company Alberts recently joined frozen fruit supplier Greenyard to create the [smoothie machine](#), a vending machine that dispenses fresh blended smoothies, aimed at promoting out-of-home smoothy consumption. The machine has been picked up by a leading Belgian supermarket, which installed several of them.

The European market for smoothies is forecasted to grow 8%–10% per year in the next few years. One of the trends supporting this outlook is the increasing awareness regarding preventive healthcare.

Tip:

Stay informed about the smoothy industry. As soon as smoothy bars evolve and chains arise, it might become interesting to supply such organisations directly.

New product developments in line with the healthy food trend

Tropical frozen fruit are used as ingredients in many industries, such as dairy, ice cream, bakery, pastry, and jams. Sometimes they undergo further processing to make a specific fruit preparation. Many companies in these segments are launching new products, such as the following:

- Ice cream producers are making innovative flavours with tropical frozen fruit, for example, using frozen tropical fruit to make sorbets and frozen desserts on sticks. Some examples include maracuja (passion fruit) sorbet by the Italian company [EDO](#), frozen pineapple and mangoes on sticks from the French company [Loragro](#), and frozen sorbets in a glass with passion fruit from the Italian company [Casa del Gelato](#). Specifically, there is increasing interest in ingredients like guava, lychee and passion fruit.
- New ice cream solutions are also following health trends. Non-dairy (lactose free) and vegan ice creams are becoming more popular, providing opportunities for suppliers of frozen tropical fruit. A good example are the 100% fruit and vegan ice creams by [Frozzies](#) and [Icedate](#).
- Fruit preparation combinations for fruit yogurts – Fruit preparations specifically designed for drinkable and spoonable yogurts are increasingly following health trends. Tropical fruit are becoming particularly popular in spoonable fruit yogurts. According to Mintel, mango is fifth place among the favourite fruit in yogurts (after berry fruits and peach), followed by passion fruit. Example: [lactose- and gluten-free peach passion fruit](#).
- Innovative bakery ingredients – Traditional bakery fruit fillings were often made with milk. Now, bakery fruit preparation producers are introducing new vegan and convenient solutions, such as [passion fruit Skyr slices](#).
- New freezing technologies allow frozen fruit to have the same texture, flavour and quality as fresh fruit without the addition of preservatives. [Nice Fruit](#) fruit preparations is one such example.

Shortening the supply chain

Companies in the tropical frozen fruit sector are trying to cut out intermediaries and make the supply chain

simpler, shorter, cheaper and more controllable. Some are investing into vertical integration, such as establishing their own orchards in producing countries. Mergers, acquisitions and strategic partnership are also taking place. For example, [Ardo](#) acquired a majority stake in Canadian [VLM Foods](#). Besides VLM Foods, the deal included a controlling stake in [Compañía Frutera La Paz S.A.](#), Costa Rica's largest frozen pineapple producer.

Tropical berries remain popular

Tropical berries are frequently labelled as superfruit because of their health benefits. Frozen tropical berries are used as ingredients in the production of drinks but also in some food supplements. Some examples include maqui berry (mainly from Chile) and acai berry (mainly from Brazil). Another example is acerola, but it is more traded as frozen pulp or concentrated rather than IQF.

Tips:

Suggest new product developments such as smoothie combinations and new flavours to your buyers. European buyers are constantly looking for innovations to increase their sales.

Support innovations in the sectors which are using tropical frozen fruit as ingredients in your own market (ice creams, fruit preparations, jams, etc.) while still supplying raw material to the EU market.

Promote the various applications and nutritional properties of tropical fruit. However, avoid health or nutritional claims that are not substantiated by scientific evidence and also make sure that you follow EU nutritional claims legislation.


Check the websites of European trade shows and exhibitions to discover the newest trends. The most important trade fairs in Europe relevant to frozen vegetables are [SIAL](#) (France, every other year in October), [Anuga](#) (Germany, every other year, in October), and [BioFach](#) for organic products (Germany, every year in February).


Invest in marketing via social media and participate in leading trade fairs in Europe to increase awareness of less-known tropical frozen fruit in Europe. European consumers are commonly aware of major tropical fruit, such as banana, pineapple and mango, but much less knowledgeable about fruits such as mangosteen, durian, rambutan, santol, lychee and salak (snake fruit). Rare tropical fruits are more commonly found in ethnical stores than in the leading retail chains.


This study has been carried out on behalf of CBI by [Autentika Global](#).

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