

What is the demand for fresh fruit and vegetables on the European market?

Last updated:

06 November 2024

Europe is a large and stable market for most fresh fruit and vegetables. The demand for year-round availability and a wide choice of produce maintains Europe's dependence on suppliers from outside Europe. The consumption of healthy, mostly conventional products like sweet potatoes and avocados will continue to increase. The European blueberries market will also remain interesting, especially giving chances for organic-certified produce. Some products will continue to benefit from potentially reduced local availability in Europe, such as watermelons, pumpkins, and sweet peppers.

Contents of this page

1. [What makes Europe an interesting market for fresh fruit and vegetables?](#)
2. [Which European markets offer most opportunities for fresh fruit and vegetables?](#)
3. [Which products from developing countries have the most potential in the European market for fresh fruit and vegetables?](#)

1. What makes Europe an interesting market for fresh fruit and vegetables?

Market size, year-round demand and dependence on external suppliers make Europe an attractive target market for suppliers in developing countries. Buyers in Europe look for reliable suppliers in strategic areas so they can offer fruit and vegetables to consumers at any time of the year.

Europe's mature and large market offers stability for suppliers

Europe is a mature and diverse market for fresh fruit and vegetables (FFV) and home to 7 of the 10 largest importing countries in the world. Although short-term needs and prices change regularly, the overall demand is relatively stable, and volumes are large. Europe has a population of almost 530 million consumers. On average, Europe imports about 55 million tonnes of FFV per year. This is almost 40% of the global average annual trade volume.

Source: UNComtrade (August 2024)

Exporting to Europe can help exporters to spread risks. For example, in 2022 the demand from the large Russian market was rather uncertain and declined by 15% on an annual basis. At such moments it is valuable to have a wide range of destination markets.

Tips:

Stay up to date on the European market using online news sources such as [Freshplaza](#), [Fruitnet](#),

[Fruitrop](#) and [Fresh Fruit Portal](#).

See the [Fruit Logistica European Statistics Handbook 2024](#) for a detailed overview of market statistics.

Diversify your export markets to balance risks. Within Europe, try to sell not only to Western and Northern European countries, but also to Southern and Eastern European countries.

European import volumes went up by one thousand tonnes in 2019-2023

The characteristics of fresh fruit imports are different from fresh vegetables imports. This section explains the details for each category. Europe is a combination of EU +United Kingdom +Switzerland +Norway. Developing countries are all in the [OECD-DAC list](#).

Fresh fruit imports with peaking imports from developing countries in 2023

Between 2019 and 2023, the total import volume of fruit went down slightly, declining at an average annual rate (compound annual growth rate or CAGR) of 0.2%.

Source: UNComtrade (August 2024)

Developing countries play an important role in the supply, and took about 45-46% of the total trade volume per year between 2019 and 2022, peaking at a 48% share in 2023. This import volume reached an all-time high of 14.4 million tonnes in 2023, resulting in a CAGR of 17%. Conversely, imports from within Europe and from other countries outside Europe declined by 1.4% and 7.2%, respectively.

Fresh vegetables imports recorded a small growth

Vegetable imports grew by a CAGR of 0.7% in 2019-2023, despite some fluctuations. Recently, there was a small drop in 2022 caused by [rising inflation in that year](#), and 2023 was marked by a record import volume of 26.0 million tonnes.

Source: UNComtrade (August 2024)

Consumption of fresh vegetables depends much more on local production. This is also reflected in the high share of intra-European trade (84-86%). The import volume from developing countries grew particularly sharply in:

- 2021: this was a recovery year after the turbulent Covid year 2020.
- 2023: imports grew by 18% compared to 2022, thanks to a strong growth in vegetable imports from Egypt, Turkey, and China.

Over the whole period 2019-2023, imports from developing countries increased by 4.0%, while imports from within Europe increased by 0.2% and imports from other countries went down by 1.6% per year.

Forecast: volumes to remain stable but inflation is a serious threat

The development of import volumes cannot be seen apart from price developments. For example, the Covid-19 pandemic caused logistic costs to peak in 2020-2021. This also had an upward effect on import prices of FFV, and a negative impact on consumption. However, logistic costs came down again in 2023 to pre-Covid levels, which had a positive impact on European FFV imports from outside Europe that year. For 2024 however,

average [prices of containers are likely to move on a higher level](#) again, which may negatively impact imports of FFV from outside Europe.

In the short-to-medium term, inflation remains a significant factor affecting the FFV market in Europe. While inflation is expected to decline from the high levels seen in 2022 (8.4%) and 2023 (around 5.3%), it will still impact consumer purchasing power in 2024, with [inflation forecast to be around 2.8%](#). This continued pressure on household budgets may lead to more conservative spending on fresh fruits and vegetables, particularly higher-value or organic products.

Because of the previously explained dynamics of inflationary pressure, the import and consumption volumes will remain relatively stable in 2024 and 2025 with small declines or increases possible. At the same time, prices are likely to go up due to higher costs of production.

Tips:

See [which trends offer opportunities or pose threats on the European fresh fruit and vegetables market](#), including the focus on local and organic, or the impact of the war in Ukraine on the fresh fruit and vegetables trade.

Inform yourself about the strict rules of the European market by reading [which requirements fresh fruit or vegetables must comply with](#).

Potential barriers to growth for your product in the European market

The most important barrier to market and import growth for a particular product is probably the carbon footprint of the products, but there are several other factors that you need to take into account:

- Preference for local – consumers may increasingly choose what is locally produced. This may be related to carbon footprint arguments, but consumers may also have more confidence in the quality of local products.
- Airfreight imports likely to go down – the growing attention to the carbon footprint has already put a halt to the growth of leguminous vegetables from Africa. However, it can further impact the market if food retailers completely stop with airfreight-imported fruit and vegetables, even if other alternatives are not available.
- Increasing demand for convenience – this can be a threat when consumers switch to more convenient alternatives for fresh produce, such as frozen products.
- Increasing focus on pesticide residues – this can be a threat to products that are typically high in pesticide residues, such as [strawberries](#). The German retailer Lidl (with locations in many European countries) already generally requires one-third of maximum residue levels and a maximum of four different pesticides.

Figure 4: Del Monte Cold – Extra Sweet Pineapple BY AIR



Source: [GloballyCool](#) (July 2023)

Tips:

Stay up to date with pesticide residue trends in fruits and vegetables. Follow the annually published '[Dirty Dozen](#)' list, for example, or check the '[Clean Fifteen](#)' list for fresh products with low residue levels.

Find the maximum allowed residue limits (MRLs) in the [European Pesticides Database](#).

Always focus on Class I and GlobalG.A.P certification when supplying high volumes. Class II fruit and vegetables are much more difficult to sell and mainly end up on the spot market. As such, they offer few guarantees and little stability for you as an exporter.

Browse our [market information platform](#) for information on exporting specific fruit and vegetables to Europe. Here you will find studies on e.g. [exporting fresh exotic vegetables](#) and [exporting fresh exotic tropical fruit](#) to Europe.

Supply from developing countries is diversified

Costa Rica, Ecuador and Colombia gained their position in the top 6 of supplying countries from large export volumes of bananas. However, in general the supply from developing countries is rather diversified. There are opportunities in many other products.

Source: UNComtrade (August 2024)

Europe's best-performing supplying developing countries include:

1. Costa Rica, Ecuador and Colombia – typical suppliers of [tropical fruits](#). Costa Rica and Ecuador export mainly bananas and [pineapples](#), but Costa Rica also supplies Europe with [melons](#), [watermelons](#) and [cassava](#). Colombia's best-known products are bananas, but the country also exports growing volumes of avocados and [exotic fruit](#).
2. Morocco – a price-competitive country with the advantage of being close to Europe. European buyers use Morocco's supply to extend seasons of soft fruit, [table grapes](#), [melons](#), [citrus](#) fruits and more. Morocco is by far Europe's most important supplier of vegetables, mainly [tomatoes](#) but also [beans](#), chilli peppers, and several green vegetables. In terms of fruit, Morocco is an important supplier of [watermelons](#), [mandarins](#), and berries. Morocco's export to Europe is the third most diversified of all developing countries (behind Turkey and Egypt).

3. South Africa and Peru – typical counter-seasonal suppliers since both countries are in the Southern Hemisphere. Peru has large-scale production projects and different climate zones to extend the season. Its main export products to Europe are [avocados](#), [mangoes](#), [table grapes](#) and bananas. South Africa competes in the same window mainly with [citrus](#) fruits, [grapes](#), pome fruits and [avocados](#). After Turkey, Egypt and Morocco, South Africa has the most diversified exports of fresh fruits and vegetables to Europe.
4. Egypt and Türkiye – also price-competitive, nearby suppliers. Egypt is very competitive in a variety of products, including oranges, [sweet potatoes](#), and [table grapes](#). Turkey's and (more recently) Egypt's exports to Europe are the most diversified of all developing countries, as both countries export a lot of different fruit and vegetables. Egypt's exports to Europe reached a record high in 2023, with a huge rise in exports of oranges, potatoes, onions, and grapes. Egypt was well-positioned to benefit from the drought and unfavourable weather conditions in Southern Europe, which led to lower production volumes in those areas.

Figure 6: Mini courgettes from South Africa available in the European market, August 2023



Source: [GloballyCool](#) (June 2024)

Tips:

Anticipate Europe's strong demand for quality products. If your company is well-organised and you can provide reliable volumes of high-quality products, you even have a chance in the Northern and Western European markets. The other regions are easier to access, yet it may still be challenging in terms of buyer requirements.

Take your time when deciding to export to Europe for the first time. Analyse if you have specific advantages in supply season or production costs, or other strengths that differentiate you as a supplier. Find your key strengths in the fresh sector.

Nearby regions or counter-seasonality continue to benefit

Sourcing in nearby regions has been one of the methods European companies use to increase availability, spread risks or reduce costs. The most interesting is early-season (or late-season) supply, as competing in the peak season in Europe will be difficult. Therefore, as a supplier from outside Europe you must consider these European windows.

Figure 7: Indicative seasonal calendar for the production of some fruit and vegetables in Europe



Source: [ICI Business](#) (2022)

When exporting to Europe within the European season, you must be up to date on the developments and supply seasons in Europe, particularly the countries that contribute most to the European supply. Especially Spain must be monitored, with its production of large volumes of citrus fruit, stone fruit, watermelons, table grapes, peppers and tomatoes. You will most likely experience competition from Spain since it exports much more than other production countries.

Also take into account the temporary import quota and measures for products that are typically produced in Europe. For example, for strawberries there is an additional charge of 12.8% from May to July for non-preferential supply countries.

Tips:

Read the [EU Agricultural Outlook for Markets, Income and Environment 2023-2035](#) for the forecast on apples, peaches, nectarines, and tomatoes.

Get more detailed insight into the availability of European products and overseas imports. Check the [seasonal calendar made by the Import Promotion Desk \(IPD\)](#) and see which local summer fruits may be competing with your product. Where possible, try to plan around the local seasons or export when prices for local seasonal fruit are still high.

Check the [Monthly Market Prices of DG Agri](#) for local producer prices in Europe to see if you are price-competitive with EU producers.

Plan your export. Monitor the production in competing countries and consider the additional or higher import tariffs for some products in specific periods. Higher tariffs are most common when European production is at its peak. Find tariff information via [My Trade Assistant in Access2Markets](#).

Keep up to date with technology and production developments in Spain, as Spanish growers are most likely to be active in your specific sector and export markets. You can find information through producer and sector associations such as [FEPEX](#) or [Asomafut](#). National statistics are available via the [Spanish Ministry of Agriculture, Fisheries and Nutrition](#) (some only in Spanish – you can use the translate function in your browser).

Above-average growth for organic fruit and vegetable imports

Currently, most of the organic fruit and vegetables available in European outlets are produced regionally. Consumers of organic fresh fruits and vegetables are conscious of carbon footprints. They prefer to buy local, seasonal products. The share of organic produce within vegetables is 8-10%, while for fruit this share varies considerably. For example, at about 25% the organic market share is highest for berries.

Consumption of organic fruit and vegetable products has increased over the past decade. However, the relatively high inflation has recently put a hold on the growth of organic fruit and vegetable sales. For the next few years, the preference for locally produced organic fruit and vegetables will remain in place. Still, for foreign suppliers organic can be an interesting niche.

As an indication of volumes, Figure 8 shows the number of organic-certified importers of fresh fruit and vegetables (FFV) in the most important EU countries.

Source: EU Commission database (July 2023)

A large number of organic-certified importers in a country indicates market opportunities for organic produce, since importers need to be certified for trading organic produce. Therefore, the best opportunities for organic produce exports are in the EU markets displayed in Figure 8. Denmark, Switzerland and the United Kingdom have relatively large numbers of certified importers too.

Tips:

Consider organic as a speciality. If your region is not suitable for organic crops, focus on the cleanest produce possible and opt for other sustainability standards.

Find out more about developments in organic products from our study on [trends in fresh fruit and vegetables](#). Read about organic legislation in the [European buyer requirements for fresh fruit and vegetables](#).

Check out the profiles of organic fresh produce importers in Europe, such as [Tradin Organic](#), [Eosta](#), and [Ithaka](#) from the Netherlands, [Bonabio](#), [Nosibe](#) and [Diana-Food](#) from France, and [Sigfrido](#), [Eurobanan](#), and [FrutasOlivar](#) from Spain.

Fairtrade-certified; bananas still leading

There is growing consumer commitment to ethical and sustainably produced food. The most important certification scheme with this focus is Fairtrade. However, this has not been picked up by the fresh sector in the same way it has impacted the coffee and cacao industry. So far, bananas are the main fruit that is Fairtrade-certified.

Fairtrade bananas from Colombia, Dominican Republic, Ecuador, or Peru can be found in many supermarkets in Western and Northern Europe. Switzerland is one of the few countries where you can also find many other Fairtrade-certified fresh fruits in supermarkets, such as passion fruit, pomegranates and oranges.

Figure 9: Fairtrade-certified oranges in a mainstream supermarket in Switzerland, July 2023



Source: [GloballyCool](#) (July 2023)

As this market is based on the certification scheme, traders can only trade Fairtrade-certified products if they have a certification too. Figure 10 shows the European countries with the highest number of Fairtrade-certified traders.

Source: Fairtrade (July 2023)

The Netherlands and Germany have the largest number of Fairtrade-certified traders, just ahead of Switzerland. Together with France and Italy, these four countries offer the most potential for exporters of Fairtrade-certified fresh produce. Most chances remain for bananas; for other fresh products volumes are likely to remain limited in the short-to-medium term.

Tip:

Read about developments in Fairtrade in the [Fairtrade Annual Report 2023](#). You can check how Fairtrade banana production is developing in the [Top 7 Products Dashboard of Fairtrade International](#).

2. Which European markets offer most opportunities for fresh fruit and vegetables?

Europe is a dynamic market with different opportunities and characteristics. For your market entry, you should consider large markets such as Germany, the United Kingdom and France. German and French companies often use logistic and trade services from the Netherlands or Belgium. Spain and Italy are both large producing and consuming countries, but with large import volumes of fresh produce from non-European countries. They also have a growing interest to extend their own production season by sourcing in nearby countries.

Source: UNComtrade (July 2023)

Europe's largest destinations for fruit and vegetables

Source: UNComtrade (August 2024)

Note that Figure 12 displays the import values in € million. As the last year 2023 was marked by considerable inflation leading to a sharp increase in prices after record import volumes in 2022 at relatively low prices (due to the turbulent market conditions that year), there was a strong growth in import values in 2023 for each of the six countries. Import volumes were also up for all countries, but their growth rates were much lower than import value growth rates. Import volume growth in 2023 ranged from 0.9-22%, while import value growth was in the range of 8.5-28%.

The Netherlands, Germany and France (Western Europe), Spain and Italy (Southern Europe), and the United Kingdom (Northern Europe) are the largest destinations for fruit and vegetables from developing countries. Buyers in these countries have gained a lot of experience in importing fresh fruits and vegetables from developing countries. For that reason, you can best focus on these countries.

Tips:

Find out who the major food retailers are in each European country at [Retail-index.com](https://www.retail-index.com) (only Portuguese data are available for free). Use our [tips for finding buyers](#) to learn how to find the right entry to the European market.

Meet with importers and distributors from all over Europe at [Fruit Logistica](#) in Berlin or [Fruit Attraction](#) in Madrid. These are the two largest trade fairs for fruit and vegetables in Europe.

The Netherlands: distribution hub for produce from outside Europe

The Netherlands is the absolute #1 importing country in Europe for fresh produce from developing countries, and also from other countries outside Europe. The import volume of developing country origin peaked at just over 3.2 million tonnes in 2021, dropping slightly to about 3.0 million tonnes in 2022, before almost reaching a new record in 2023 (3.1 million tonnes).

The Netherlands is a European hub for trade in fresh fruit and vegetables (FFV) and the Port of Rotterdam plays an important role. The highest concentration of fruit and vegetable traders in the Netherlands is on the south side of Rotterdam. These companies import FFV from all over the world and distribute the products to the rest of Europe. Because of this role, the country is good for more than 17% of Europe's imports from developing countries. For imports from other countries outside Europe, this share is even higher (21%).

The hub function is most prominent for fresh fruit. For vegetables, the situation is different: most of the Dutch fresh vegetable consumption and export volume consists of locally grown potatoes, onions, and greenhouse vegetables such as tomatoes and paprikas.

The best performing products from developing countries between 2019-2023 are avocados, bananas, citrus fruit, sweet potatoes, blueberries and exotic fruits. The Netherlands is a global top 10 destination for FFV from South Africa, Costa Rica, Peru, Egypt, Ecuador, Brazil, and Morocco. A closer look at global trade in the period 2019-2023 shows that the Netherlands is:

- the largest European destination for fresh produce from Central America and South, East, and South-East Asia, and the 2nd largest European destination for FFV from South America.
- the largest destination for FFV from Southern and East Africa.
- an important market for FFV from North Africa, West Africa, and the Caribbean.

The Netherlands is not the largest market for organic and fairtrade fruit and vegetables – more important is the country's role as one of the main hubs in the fresh fruit and vegetables trade. This hub function is also visible for

organic and fairtrade fresh produce, as the country is home to more than 230 organic-certified and 25 fairtrade-certified importers of fresh fruit and vegetables (figures of July 2023).

Since other European countries like Belgium, Germany, France and the United Kingdom import large volumes of FFV from the Netherlands, it can be assumed that a considerable part of the organic market in these countries is supplied by Dutch exporters. This is also the case for fairtrade-certified produce but to a lesser extent, as Germany, France and Belgium also have relatively high numbers of fairtrade-certified importers.

The Netherlands' total import growth in the period under review was positive (+1.7% CAGR) and Dutch exports grew by the same 1.7% per year. This resulted in a net import (what is left for consumption or use within the country) growth of 2.0% per year. The best performing import products were:

- watermelons
- fresh or chilled vegetables
- avocados
- bananas
- mandarins
- sweet potatoes
- blueberries
- pumpkins

[Inflation in the Netherlands](#) is forecast to be among the highest of Europe's largest markets in the short-to-medium term (3.5% in 2024 and 2.5-3.0% in 2025). This will likely have a negative effect on the development of premium markets, such as the organic segment. A more positive indicator for the long-term development of total fresh fruit and vegetable imports is the population index. The Dutch population is forecast to grow by 2.8% in 2021-2028.

Tips:

Consider the Netherlands as your #1 focus market if you export exotic products.

Read our study on [Exporting fresh fruit and vegetables to the Netherlands](#) to learn more about the specifics of the Dutch market and its role as a trade hub.

Find potential partners or service suppliers in the Netherlands through the [member portal of the Dutch Fresh Fruits and Vegetables Association "GroentenFruit Huis"](#). This centre represents fruit and vegetable companies that account for over 80% of total sales in the Netherlands.

Germany growing imports from developing countries

Germany has over 83 million inhabitants and a strong purchasing power. The country has the largest consumption of FFV in Europe. In 2023, German companies imported a total volume of 8.0 million tonnes of FFV, which is more than 14% of the European total. It was however a considerable decline compared to 2019 (-2.7% CAGR). Although German imports peaked at a record high of 9.1 million tonnes in 2020, the rising inflation since then caused a drop in import and consumption since 2021.

Direct imports from developing countries were 2.6 million tonnes in 2023. Overall, imports from developing countries rose by 3.0% per year, which was the second highest growth rate of the six focus countries, behind Spain.

The best performing products from developing countries to Germany between 2019-2023 were avocados,

tomatoes, grapes, sweet peppers, exotic fruits, bananas, and watermelons. Germany is a global top 10 destination for FFV from Ecuador, Colombia, Costa Rica, and South Africa. A closer look at global trade in the period 2019-2023 gives the following highlights:

- Germany is the largest European destination for FFV from South America and the Caribbean and the third largest for FFV from Central America.
- Germany is the 5th largest destination for FFV from North Africa, far behind France, Spain, the Netherlands and the United Kingdom. A strong growth in imports from Morocco contributed to the high growth of 8.8% per year for imports from this region.
- Germany is the third largest European destination for FFV from Southern Africa. Contrary to the two largest destinations the Netherlands and the United Kingdom, Germany's imports from Southern Africa grew very fast (+11% per year).
- Germany is East Africa's fastest growing FFV destination. German imports grew by 21% per year, resulting in a 4th position behind the Netherlands, the United Kingdom, and France. German imports from Central Africa grew even faster (+32% per year), resulting in a 3rd position.

Germany is Europe's largest organic market. The country is also in the top 5 of fairtrade markets in Europe. A large share of organic-certified products is not imported directly from developing countries but is bought from certified importers from the Netherlands.

Despite the overall drop in FFV imports between 2019 and 2023, there are a few products that had a strong performance, namely:

- Avocados
- Mandarins
- Mangos
- Sweet potatoes

For the next few years, inflation in Germany is forecast to come down and reach average European values (2.0-2.3%). While the high inflation in 2022-2023 has impacted the organic FFV market negatively, this premium market will slightly recover in the next few years. In addition, the German population is barely growing at present, meaning that an important driver of previous market growth has disappeared.

Tip:

Consult our study on [exporting fresh fruit and vegetables to Germany](#) for detailed insights on the German market.

United Kingdom: imports from developing countries are the only growing trade flow

The United Kingdom is highly dependent on external supply, and a record share of 50% of the total import volume comes directly from developing countries (in 2023 this exceeded 2.5 million tonnes). This makes it the third European market for exporters from developing countries, behind the Netherlands and Germany.

UK imports had the worst performance of all six focus countries (-3.9% CAGR), but this was mostly due to large drops in import from Europe (-7.5%) and "rest of the world" (-8.2% CAGR). The import volume from developing countries increased slightly (+0.8%). A positive indicator for the long-term development of total fresh fruit and vegetable imports is the population index. The United Kingdom's population is forecast to grow by 3.2% in

2021-2028, the highest of all the six focus countries.

The United Kingdom officially left the EU on 31 January 2020 (Brexit). This has increased the administrative burden for EU exporters to the United Kingdom and has made trade slower and more expensive. Consequently, imports from the EU dropped from 3.2 million tonnes in 2019 to 2.4 million tonnes in 2021. At the same time, Brexit has opened up new opportunities for non-European suppliers, in particular for those that can replace some EU supplies.

UK offers opportunities for direct suppliers (Post-Brexit)

As of 2024, the United Kingdom government has continued its implementation of the 'Border Target Operating Model' for all goods imported into the country. This model introduces a new, risk-based approach to Sanitary and Phytosanitary (SPS) checks for food, animal, and plant products. The rollout began in late 2023 and will expand through 2024.

By late 2024, new Safety and Security declarations will become mandatory for all EU imports. Additionally, the United Kingdom is introducing a Single Trade Window, which will streamline the process for importers to submit information to the government, potentially reducing administrative burdens.

While these changes introduce more formalities for EU imports, [the United Kingdom's trade agreements with non-EU countries](#) may create new opportunities for fresh fruit and vegetable exporters from developing countries. These agreements could offer reduced tariffs and simplified access to the United Kingdom market, making it an attractive destination for direct suppliers outside the EU.

The best performing products from developing countries to the United Kingdom between 2019 and 2023 were tomatoes, mandarins, avocados, watermelons, exotic fruits, leguminous vegetables, all kinds of berries, sweet potatoes and sweet peppers. The United Kingdom is a global top 10 destination for FFV from South Africa, Costa Rica, Morocco, Colombia, and Egypt. A closer look at global trade in the period 2019-2023 gives the following highlights:

- The United Kingdom is in the top 3 European destinations for FFV from Central and South America, however imports declined by 1.5% per year on average between 2019 and 2023.
- Lagging far behind France and Spain, the United Kingdom is the third largest destination for FFV from North Africa, together with the Netherlands. Imports from North Africa grew the fastest of all leading destinations (+9.7% per year), mainly because of fast-growing imports from Morocco.
- The United Kingdom is the second-largest destination for FFV exports from South and East Africa, behind the Netherlands.
- Before Brexit, the United Kingdom was by far the leading destination for FFV from the Caribbean (mainly the Dominican Republic). However, due to a drop of 15% on average per year, the United Kingdom lost several positions.
- The United Kingdom is the largest destination for FFV from Central Africa (Cameroon).
- The United Kingdom used to be the largest destination for South Asian FFV exports to Europe, however the country lost this position to the Netherlands recently.

The United Kingdom is an important fairtrade market. The country is also in the top 7 of organic markets in Europe. Several of the leading mainstream retailers in the United Kingdom, like Sainsbury's and Waitrose, have a wide range of fairtrade- and organic-certified fresh fruit and vegetables. Certified fresh produce is imported directly by UK's certified importers, or (more likely) through certified importers from the Netherlands.

Inflation in the United Kingdom is forecast to be among the highest of Europe's largest markets in the short-to-medium term (3.0% in 2024 and 2.5-3.0% in 2025). This will likely have a negative effect on the development of

premium markets, such as the organic and fairtrade segments.

Tips:

As an exporter of organic or fairtrade-certified products with an ambition to export to the United Kingdom, focus on selling directly to certified importers there, or to certified importers in the Netherlands.

Keep up to date with EU/non-EU free trade agreements with the United Kingdom on the [GOV.UK website](#). Another page gives [updates on the EU-UK trade agreement](#).

Spain: develops into a trade hub for fresh produce from developing countries

Spain is Europe's #1 producer and exporter of FFV within Europe. Spanish imports often involve off-season or counter-seasonal fruit and vegetables that are complementary to local production. At the same time, Spain is developing into a potential trade hub, particularly for Moroccan produce. In Spain the [daily consumption is far above average](#), especially of fruit. Spanish consumers often consider taste to be more important than the visual quality of the product.

Spain is an important European producer of watermelon, blueberries, peppers, citrus fruit and avocados. While Spain is often a competitor for exporters to Europe, there are also opportunities, most likely in the form of partnerships and for products whose Spanish output is declining, such as tomatoes and stone fruits.

In 2019-2023, imports from developing countries grew by a CAGR of 7.6% to a record volume of 2.0 million tonnes. This was the largest growth of the six focus countries.

The best performing products from developing countries to Spain between 2019 and 2023 were citrus fruits, bananas and plantains, avocados, watermelons, onions, pineapples, exotic fruits, potatoes, grapes, blueberries, sweet peppers and melons. Spain is a global top 20 destination for FFV from Morocco, Costa Rica, and Peru.

A closer look at global trade in the period 2019-2023 gives the following highlights:

- Spain is the 2nd largest destination for FFV from North and West Africa (behind France). Imports from both regions grew relatively fast (at +6.3% and +9.2% respectively).
- Especially for West African FFV, Spain is gaining share quickly as exports to France went down by 4.2%.
- Spanish imports from West Africa are dominated by Ivory Coast and Senegal. While until 2021 imports from Mauritania remained under 2,000 tonnes, they took off recently to reach 12,700 tonnes in 2023.
- Although Spain and Spanish-speaking South and Central America have the same language, Spain is not the largest European destination for FFV from both regions, but comes behind the Netherlands, Germany, and the United Kingdom.

Spain is neither an important organic nor a fairtrade market for fresh fruit and vegetables. Most of the organic certifications for Spanish importers are related to complementation of their offer of local produce (such as oranges) in order to develop a year-round supply.

Total Spanish FFV imports grew by 5.1% per year between 2019 and 2023, which is the highest growth of all focus countries. After a stable year, 2022, the year 2023 proved to be very dynamic with an 8.6% growth. Products that have seen a very strong import growth both in the whole period and in 2023 are:

- Avocados
- Citrus: oranges and mandarins
- Bananas and plantains
- Onions
- Sweet peppers
- Apples

A positive indicator for the long-term development of total fresh fruit and vegetable imports is the population index. The Spanish population is forecast to grow by 2.5% in 2021-2028, which is among the highest in Europe. Conversely, Spain's inflation rate is expected to be high with around 2.9% in 2024. The country is facing inflationary pressures from both energy costs and food prices. In 2025, inflation will come down a bit (2.5%) but will keep on having an impact on premium markets.

Tips:

Explore Spain as a potential market if you are able to produce fruits and vegetables outside the Spanish season.

Meet potential trade partners and present your product at the annual [Fruit Attraction](#) trade fair in Madrid.

Get more specifics from our study on [Exporting fresh fruit and vegetables to Spain](#).

France: important trade relation for French-speaking African suppliers

France has the second-largest population in Europe, making it one of the main target markets for fresh produce exporters. In 2023, France imported 1.6 million tonnes of fruit and vegetables from developing countries, a -5.6% average annual decline since 2019. This was only 27% of total imports, the lowest share of all six focus countries. The weak performance found its origin in a 35% drop in 2020 due to the Covid pandemic. Since then, imports from developed countries have only partially recovered.

France imported less produce from outside Europe directly. While imports from developing countries went down, the category 'rest of world' declined too, by as much as -11% per year. By contrast, imports from other European countries went up by 3.9% per year. The main reason was a shift in sourcing of bananas, pineapples and exotic fruits from developing countries; these products had been increasingly sourced from the Netherlands and Belgium since 2020.

France has local production of seasonal produce such as apples, beans, peas, onions and stone fruit. Part of the local produce is cultivated organically.

The best performing products from developing countries to France between 2019 and 2023 were watermelons, tomatoes, sweet peppers, and mandarins. France is a global top 20 destination for FFV from Morocco and Ivory Coast. France is an important destination market for FFV from several of the world's production regions. A closer look at global trade in the period 2019-2023 gives the following highlights:

- France is the largest destination for fresh produce from North and West Africa and the common French language clearly facilitates trade.
- While imports from North Africa went up from 739,000 tonnes in 2019 to 860,000 tonnes in 2023, import from West Africa went down from 393,000 tonnes in 2019 to 331,000 tonnes in 2023.
- French imports from West Africa are dominated by Ivory Coast, however also come from Ghana, Senegal, (since a few years) Mauritania and Benin, Burkina Faso, Togo, and Mali.

- France used to be the clear top market for FFV from Central Africa, but imports dropped from 67,000 tonnes in 2019 to 25,000 tonnes in 2020 and have, until now, only partially recovered (37,000 tonnes in 2023).
- France is a stable market and in the top 3 destinations for fresh produce from East Africa.

France is an important organic market. The country is also in the top 7 of fairtrade markets in Europe. Certified fresh produce is imported directly by France's certified importers or through certified importers from the Netherlands or Belgium.

The total French imports of FFV showed a small growth of 0.4% in the period 2019-2023. Since 2021, total imports have remained relatively stable, in spite of the high inflation in France in 2022 and 2023 (although high, compared to other European countries it has remained on the low side). France's inflation is forecast to be around 2.2-2.5% in 2024 and go down to between 2.0-2.3% in 2025. The impact of the inflation on premium markets such as organic is and will certainly persist there, yet will have a less severe impact than in other countries with higher inflation rates (such as the Netherlands and the United Kingdom).

Tip:

Make sure you can communicate in French, otherwise your chances in France will be limited.

Italy: limited volumes from nearby supplying countries in North Africa

Italy is the sixth-largest importer from developing countries, ahead of Poland. The country is an important producer and exports part of production. The import volume from developing countries increased by 2.5% per year to 1.2 million tonnes in 2023, a share of 34% of total imports. This share is higher than in Germany (33%) and France (27%), but much lower than in the United Kingdom, Spain and the Netherlands (with shares between 39-50% each).

The best performing products from developing countries to Italy between 2019 and 2023 were bananas, citrus fruits, potatoes and pumpkins. For these countries Italy is in the top 10 of the largest destinations:

- Costa Rica: 4th largest destination,
- Colombia: 4th largest destination,
- Ecuador: 7th largest destination.

Although Italy is very close to North Africa, it is only the 6th largest destination for FFV from that region, behind France, Spain, the Netherlands, United Kingdom, and Germany. Although Italy is Egypt's and Tunisia's 3rd largest destination for FFV, Italy does not import FFV from Morocco, contrary to many other European countries.

The Italian [daily consumption is far above average](#), especially of fruit. The Italian people are very familiar with the summer fruit grown in the country, and therefore often consider taste to be more important than the visual quality of the product. This also explains to some extent why Italian consumers are less interested in certified products. Italy is neither an important organic nor a fairtrade market for fresh fruit and vegetables. Most of the organic certifications for Italian importers are related to complementation of their offer of local produce (such as oranges) in order to develop a year-round supply.

Total Italian FFV imports were up by 1.9% per year on average, especially thanks to a strong 15% growth in 2023 that was strongly affected by a large rise in potato imports. Also, the import of bananas, pears, and avocados showed strong growth. For the next few years, import growth will remain positive due to relatively low

inflationary pressure (1.3-1.6% in 2024 and 1.0-1.5% in 2025). This consumption growth will be partly compensated by the shrinking Italian population (about 0.2-0.3% per year in 2024 and 2025).

Tip

Visit [Macfrut](#) to learn more about the tropical fruit market in Italy.

3. Which products from developing countries have the most potential in the European market for fresh fruit and vegetables?

This chapter highlights six promising products with potential in the European market: sweet and hot peppers, watermelons, [pumpkins](#), [avocados](#), [sweet potatoes](#), and [blueberries](#). These six products were defined based on performance in 2019-2023 (see [Annex](#)) and drivers for growth. Drivers for growth can be related to consumption trends and availability.

Sweet and hot peppers

The import of sweet (such as bell peppers and pointed peppers) and hot peppers from developing countries have shown an interesting growth of 9.5% per year between 2019 and 2023. They grew from 250 thousand tonnes in 2019 to 359 thousand tonnes in 2023. Spain, France and Germany are the leading importers within Europe, yet their import volumes only account for 56% of European imports. Other sizeable importing countries are Romania, Bulgaria, the United Kingdom, Croatia, Austria and Czechia. Spain is also the largest supplier to the European market with a considerable local, however recently declining, production.

The supply of peppers to Europe is quite concentrated with Morocco (201 thousand tonnes in 2023) and Türkiye (110 thousand tonnes) supplying large volumes of predominantly sweet peppers. Together, both countries account for 92% of European imports. Their exports to Europe increased by 11% and 13% per year, respectively.

Interesting is the large number of countries that supply volumes of more than 300 tonnes per year to Europe (17). In this group of countries, there are nearby countries such as Albania (+15% per year), Egypt (+74%), Serbia (-15%), and Bosnia Herzegovina (+8.7%), that each export between 12 thousand tonnes and 1.1 thousand tonnes of mostly sweet peppers. However, there are also several supplying countries that are less close to Europe (see Figure 13).

Source: UNComtrade (August 2024)

The countries displayed in Figure 13 mostly export hot peppers to Europe, except for Jordan.

European buyers from particularly Western and Northern Europe demand high-quality produce with a consistent size, colour, and freshness. In the Central and Eastern European markets, Class II peppers are more common. Ensuring this level of quality requires investment in post-harvest handling, packaging, and cold chain logistics, which can be challenging for smaller exporters. Despite these challenges, exporters from a wide range of countries have found clients for their sweet and hot peppers in the European market:

- Egyptian exports of (sweet) peppers mainly go to Hungary.
- Most of Jordan's (sweet) peppers exports go to Greece.
- Half of India's (hot) pepper exports go to the United Kingdom and a quarter to Germany.

- The United Kingdom is the foremost market for hot pepper exports from Rwanda and Senegal, and for the first time imported sweet peppers from Jordan in 2023 (valued €0.5 million).
- Almost all of El Salvador's (hot pepper) exports go to Czechia.
- 40% of Uganda's hot pepper exports goes to the Netherlands.
- 60% of Mexico's hot pepper exports goes to Germany.

Suppliers from developing countries should take the European production season into account – for example, local production of bell peppers in the Netherlands takes place between April and October, and most imports fall between October and March (which is also the case with Uganda's pepper exports to the Netherlands).

The pepper consumption in Europe is increasingly dominated by red, yellow, and orange bell peppers. These colours are preferred for their sweetness, vibrant appearance, and versatility in cooking. While green sweet peppers are less sweet and often harvested earlier, they are still widely used, particularly in cooking where a less sweet flavour is desired. There is also a growing market for mini sweet peppers (intended as a snack), and pointed sweet peppers (used in Mediterranean cuisine, salads, and for grilling).

Watermelons

Imports of watermelons from developing countries grew by 7.8% per year in 2019-2023. Imports peaked in 2022 at 667 thousand tonnes and went down slightly to reach 660 thousand tonnes in 2023. These imports benefited from lower availability from Spain in the past few years due to drought. This situation is likely to persist for the next few years. On the other hand, the heat in Europe also is an important driver of watermelon consumption. The combination of both factors will make watermelon one of the best-performing products in the next few years.

Local unavailability in Spain made the Spanish imports grow to a peak of 147 thousand tonnes in 2022. Although Spanish production recovered partly and imports dropped to 113 thousand tonnes in 2023, imports remained elevated. The limited availability of Spanish watermelons also had an impact on other European markets, leading to a strong growth of imports from several developing countries:

- Morocco with 10% growth per year
- Brazil (+4.7%)
- Turkey (+26%)
- Mauritania (from 1.7 thousand tonnes in 2021 to 43 thousand tonnes in 2023)
- Senegal (+12%).

Figure 14: Watermelons of two sizes available in a mainstream supermarket in the Netherlands, June 2024



Source: [GloballyCool](#) (August 2023)

Out of the top supplying developing countries to Europe, only Costa Rica (-6.6%) and Panama (-6.5%) registered losses. Ukraine's exports of watermelon to Europe declined from 13-16 thousand tonnes per year before the war to only 100 tonnes in 2022 and in 2023.

The top destinations in the European market are France (146 thousand tonnes in 2023), followed by Spain (113 thousand tonnes), the Netherlands (97 thousand tonnes) and the United Kingdom (87 thousand tonnes).

For the next few years, opportunities for exporters will chiefly depend on Spanish production. If production is below expectations for any reason, exporters may have increased chances in the European market. The typical weight for watermelons from Southern Europe is 2.5 kg for mainstream retail, while ethnic retailers usually prefer larger sizes.

Organic-certified watermelons are often mini-varieties and chiefly come from Spain, Italy or Portugal. The most important markets for organic watermelons are in Western and Northern Europe.

Pumpkins

The European market for pumpkins and squash is predominantly supplied by local producers, especially from Spain. However, there is a notable opportunity for exporters from outside Europe between November and May, when local availability is limited. Besides, Spanish production and exports had been down in 2022 and 2023 due to challenging weather conditions.

The opportunity for exporters from developing countries is also reflected in their growing supplies to Europe (+4.8% per year in the period 2019-2023). Besides, exporters from more than 15 developing countries have found markets in Europe for at least 300 tonnes per year.

There is significant supply from Morocco (60 thousand tonnes in 2023), Turkey (27 thousand tonnes), and South Africa (23 thousand tonnes). South Africa in particular capitalises on the European off-season to supply pumpkins. Other sizeable supplying countries to Europe come from a mix of regions:

- Argentina (5.5 thousand tonnes in 2023), Brazil (2.7 thousand tonnes) and Peru (1.8 thousand tonnes) from South America,
- Egypt (3.6 thousand tonnes) and Tunisia (2.1 thousand tonnes) from North Africa,
- Senegal (2.9 thousand tonnes) and Namibia (600 tonnes) from West and Southern Africa,
- Costa Rica (1.4 thousand tonnes), Mexico (500 tonnes), and Guatemala (350 tonnes) from Central America.
- India (980 tonnes), Pakistan (570 tonnes), and China (380 tonnes) from Asia.

Non-European exporters can succeed in the European market by focusing on unique varieties, organic certification (certainly for large organic markets like Germany), or by targeting specific niche markets such as baby pumpkins or exotic varieties.

Avocados

Avocado remains a fast-growing product on the European market. Imports of avocados from developing countries grew by 12% per year in 2019-2023. A period of very high growth (2016-2021) of European avocado imports was followed by a slow-down. In 2022, import volumes declined by 3.3%. Imports recovered in 2023, with a growth of 20% on an annual basis. In the near future exporters must consider stronger fluctuations in margins due to a larger influx and temporary oversupplies.

More than 13 developing countries export more than 1,000 tonnes on an annual basis. Peru is by far the largest supplying country (403 thousand tonnes in 2023), followed by Colombia (117 thousand tonnes), Kenya (81 thousand tonnes), South Africa (71 thousand tonnes), and Morocco (61 thousand tonnes). Imports from

Mozambique, Morocco, Tanzania, Guatemala, and Brazil grew relatively fast.

The import is quite concentrated: four European countries dominate the import, led by the Netherlands, followed by Spain, Germany, and the United Kingdom. The leading markets for organic avocados are in Western Europe (Switzerland, Germany, France), followed by Northern Europe (UK, Sweden, Denmark). Peru, Israel, South Africa, Spain, Kenya, Dominican Republic and Mexico supply organic avocados to Europe. Fairtrade avocados are still hard to find in the European market.

Sweet potatoes

Sweet potatoes have been successfully promoted in Europe by North American growers and have become a standard supermarket product in Europe. Since then, several other countries have successfully started to export sweet potatoes to Europe. Imports of sweet potatoes from developing countries grew by 17% per year in 2019-2023.

The popularity of sweet potatoes is reflected in a strong growth of imports to Europe. While the Netherlands and the United Kingdom dominate imports from developing countries (70% share), German imports have grown especially fast (+40% per year, from 5.1 to 19.4 thousand tonnes. Italy (+47%) and Poland (+47%) even recorded higher growth figures, however their import volumes are still much lower (5.1 and 3.0 thousand tonnes).

More than 7 developing countries export more than 1,000 tonnes on an annual basis and another 7 exported between 160 and 1,000 tonnes to Europe in 2023. Egypt dominates the supply of sweet potatoes to Europe with an export volume of 152 thousand tonnes in 2023 and a record growth of 32% in the period 2019-2023. China comes in 2nd position (38 thousand tonnes), followed by South Africa (5.7 million tonnes), Brazil (4.1 million tonnes), and Honduras (3.2 million tonnes). While Egyptian exports to Europe flourished, these of Honduras (-30% per year) and Brazil (-7.2%) dropped considerably.

Long-distance supply has some challenges, as sweet potatoes need to be cured well to maintain shelf life during shipping. Current and short-term growth is strengthened by the European processing industries, for example to make fries. Quality is an important success factor and future trade will likely require further specialisation of producing countries.

The leading markets for organic sweet potatoes can be found in Western and Northern Europe, with important organic markets in Germany, Switzerland, France, the Netherlands, the United Kingdom, Denmark and Sweden. Organic sweet potatoes are mostly imported from within Europe, e.g. from Portugal. Portugal's exports of sweet potatoes to Europe have also grown fast in the period under review (+8.9% per year). Likewise, Egypt and South Africa have a few suppliers of organic sweet potatoes.

Fairtrade sweet potatoes are mostly sold in Switzerland, but can be found in some other countries too, like the United Kingdom. Egypt is one country that exports fairtrade-certified sweet potatoes.

Blueberries

Imports of blueberries from developing countries grew by 14% per year in 2019-2023 to 164 thousand tonnes. Blueberries have become very popular in Europe as a convenient and healthy fruit. Consumption has increased exponentially together with the higher production volumes. The higher available volumes regularly result in discounted offers and promotions. Four countries dominate the import of blueberries from developing countries: the Netherlands (46 thousand tonnes), the United Kingdom (35 thousand tonnes), Spain (33 thousand tonnes), and Germany (27 thousand tonnes).

For exporters it is a high-value product that also requires a large investment. But as global volumes and food safety requirements increase, they are not without risks. There is also a growing preference for fresh berries that can be sourced in or close to Europe. Despite the preference for local fruit, imports from developing

countries are still on the rise and have grown much faster than imports from within Europe (CAGR of 2.6%).

Peru, Morocco and South Africa dominated the supply to Europe in 2023, together supplying 148 thousand tonnes, good for 90% of all blueberries coming from developing countries. Serbia, Ukraine, Argentina and Zimbabwe follow with export volumes between 5.7 thousand tonnes (Serbia) and 2.0 thousand tonnes (Zimbabwe). These countries export much smaller volumes to Europe, yet three of them registered high growth (Serbia +47% per year, Ukraine +19%, Zimbabwe +41%).

Figure 15: Blueberries from Ukraine sold in a supermarket in the Netherlands, August 2023



Source: [GloballyCool](#) (August 2023)

Compared to other fresh fruit, blueberries have a relatively high level of pesticide residues. In general, blueberries produced within Europe have lower pesticide residues than produce imported from outside Europe. For that reason, above-average opportunities in the European market lie in organic-certified blueberries.

Organic-certified blueberries are available from within Europe (Spain, Portugal, France, Germany, Italy, Netherlands, Poland, Romania, UK), and from Chile, Peru, Argentina, Morocco and Mexico. The availability of organic-certified blueberries from Serbia remains limited.

The most important markets for organic blueberries are in Western and Northern Europe. The leading markets are Germany, Switzerland, France, the Netherlands, UK, Denmark and Sweden. Fairtrade-certified blueberries are hardly available, if at all.

Tips

Read CBI's product studies for a thorough analysis of Europe's market potential and entry for sweet peppers, [watermelons](#), [pumpkins](#), [avocados](#), [sweet potatoes](#), and [blueberries](#).

Consider residue-free production and [EU organic certification](#) if the EU organic market offers good opportunities, such as in the case of blueberries.

Look into competitive trade policy advantages you may have for these fruits and vegetables compared to exporters from other countries. Consult the [list of trade agreements](#) and use the [TARIC database](#) to search for custom tariffs in the EU.

Check with potential buyers in Europe to find out which specific varieties are most interesting for them. Spread your risks by diversifying your products and varieties, and by keeping up to date on plant diseases and potential threats to your products.

Invest in production capacity and, if possible, with various supply seasons. European buyers look for producing exporters in strategic countries that can help establish a year-round and reliable supply of

quality products. For example, [Camposol](#) has taken advantage of the different climate zones in Peru and Colombia to fill in a wide supply window of avocados and blueberries.

[GloballyCool](#) carried out this study on behalf of CBI.

Please review our [market information disclaimer](#).