

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

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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. European blueberries will also remain interesting, especially giving chances for organic-certified produce. Some products will continue to benefit from reduced local availability in Europe, such as onions and cucumbers.

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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 6 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 over 530 million consumers. On average, Europe imports 55 million tonnes of FFV per year. This is 40% of the global average annual trade volume.

Source: UNComtrade (July 2023)

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 2022](#) 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 slightly in 2018-2022

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 stable with small decline

Source: UNComtrade (July 2023)

Over 2018-2022 the import volume of fruit went down slightly, dropping at an average annual rate (compound annual growth rate or CAGR) of 0.5%.

Developing countries play an important role in the supply, having taken about 45% of the total trade volume per year in the period under review. This import volume reached a peak of 14.0 million tonnes in 2021, declining by 5.3% in 2022. This resulted in a CAGR of -0.7%. Only intra-European trade volume grew slightly, at a CAGR of 0.2%. This indicates that production within Europe has remained strong.

Fresh vegetables imports recorded a small growth

Vegetable imports grew with a CAGR of 1.5% in 2018-2022, but with great fluctuations: after a major increase in 2019 (from 24.1 to 26.1 million tonnes), they dropped to 25.2 million tonnes in 2020. Then they went up again, reaching 25.6 million tonnes in 2022. This temporary decline in 2020 was caused by large drops in imports of the largest and third largest commodity within fresh vegetables – potatoes and onions.

If these two large commodities are not included in the figures, the import of fresh vegetables will have shown an upward trend in the whole period with strong (5%) growth in 2019, a stable 2020, small (2.0%) growth in 2021, and a decline in 2022 caused by the [rising inflation in that year](#).

Source: UNComtrade (July 2023)

Consumption of fresh vegetables depends much more on local production. This is also reflected in the high share of intra-European trade (86-88%). The import volume from developing countries grew sharply in 2019 and has remained rather stable since then, except for a temporary drop in 2020. Record year 2022 was the first year that the import volume from developing countries exceeded 3.0 million tonnes. The most important contributors to this growth are Europe's 'neighbouring' countries Morocco, Turkey and Egypt.

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, the [Drewry world container index](#) indicates that container prices are returning to levels closer to normal (July 2023).

In the short-to-medium term, import and consumption volumes will remain relatively stable but prices are likely to go up due to higher costs of production. Still, inflation in European end-markets can be a serious threat to European consumption of fresh fruit, especially for products that are already more expensive in general. With

the increase in logistic costs and the war in Ukraine causing temporarily high energy prices, in recent years several factors have shown a potentially major impact on inflation rates and consumption of fresh produce.

The Netherlands, France and Germany have the highest [inflation](#) in 2022 and 2023, which will likely result in price spikes in these markets. In turn, this may have a negative impact on the consumption of FFV in these markets.

Another indicator for market and import development is population growth. Most striking within Europe are the declining population in Italy, the stabilisation in Germany, and the ongoing population growth in France, the Netherlands, Spain and the UK. A growing population is likely to drive the growth of fresh produce consumption.

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](#).

Barriers to growth

The most important barrier to growth is probably related to the carbon footprint of the products, but there are several others:

- 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: Globally Cool (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

Several of Europe's best-performing supplying developing countries (Costa Rica, Ecuador) gained that position from large export volumes of bananas. However, overall the supply from developing countries is rather diversified.

Source: UNComtrade (July 2023)

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, grapes, [melons](#), citrus and more. Morocco is by far Europe's most important supplier of vegetables, mainly tomatoes but also beans and several green vegetables. In terms of fruit, Morocco is an important supplier of watermelons and mandarins. Morocco's export to Europe is the second most diversified of all developing countries (behind Turkey).
3. Peru and South Africa – 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, grapes and bananas. South Africa competes in the same window mainly with citrus, [grapes](#), pome fruits and [avocados](#). After Turkey and Morocco, South Africa has the most diversified exports of fresh fruits and vegetables to Europe.
4. Egypt and Turkey – also price-competitive, nearby suppliers. Egypt is very competitive in a variety of products, including oranges and [sweet potatoes](#). Turkey's export to Europe is the most diversified of all developing countries, as the country exports a lot of different fruit and vegetables. Tunisia is far behind both countries in terms of export volume, yet also showing good export performance (+5.1% per year, +21 thousand tonnes in 2018-2022).
5. Kenya – an example of an East or West African country that has successfully developed exports to Europe. Avocados have become Kenya's main product, after a gain of 26 thousand tonnes in 2018-2022 (CAGR of 14%). While several other products also show growth (like pineapples, vegetables, leeks), the country's previous leading export product, beans, has lost export volume (CAGR of -6.8%, 8.3 thousand tonnes decline in total).

Figure 6: Green beans from Kenya in a German open-air market, June 2023



Source: Globally Cool (June 2023)

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 2020-2030](#) for the forecast on apples, peaches, nectarines, oranges and tomatoes.

Get more detailed insight into the availability of European products and overseas imports. Check the [seasonal calendar of northwest Europe](#) or 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 [Asomafrut](#). 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 FFV in the most important European 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 UK 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](#).

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 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: [Globally Cool](#)

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 2022](#). You can check how Fairtrade banana production is developing in the [Top 7 Products Dashboard of Fairtrade International](#).

Each region provides different opportunities

Consumption volume and patterns are different throughout Europe. Countries can be grouped into roughly four different regions: Western, Northern, Southern and Eastern Europe. Below is a short profile of supply and important characteristics for each region.

Western Europe offers the best market for high-value exotics and organic produce

Western Europe is home to Europe's top-3 importing countries: Germany, the Netherlands and France. Belgium is close in terms of import volume. The region is characterised by a relatively high [purchasing power](#), which allows for consumers' relatively generous spending on FFV. The food retail sector is large-scale and the sector's requirements for quality and food safety are relatively strict. Several countries in Western Europe are among the largest organic fresh fruit and vegetable markets.

Imports from North Africa, West Asia and West Africa are relatively moderate. Imports from South and Central Asia are only 13% of total imports. In 2018-2022, imports from North Africa (+5.1%) and Eastern Europe (non-EU) (+5.6%) grew the fastest. The following products showed a relatively strong export development to this region (and more than to the other regions):

- Edible roots
- Fresh or chilled vegetables, cauliflower and broccoli
- Exotic fruit, avocados, kiwifruit, grapes
- Figs, blueberries

Last, the popularity of avocado led to a strong growth of imports of avocados from Colombia, Morocco and Kenya (+35, +23 and +20 thousand tonnes).

Northern Europe: imports down, but growing from North Africa, South and Central Asia, and China

The United Kingdom is good for 55-60% of Northern Europe's total import volume of FFV. Sweden's imports are much smaller, but far more than those of the other Nordic countries. Overall, the region's imports were down by 3.4% per year on average. While most countries experienced a decline and several a stronger drop than the UK (Denmark -5.3%, Finland -6.7%), the import drop of the UK (-3.3%) defines the region's average. Obviously, these countries suffered from high inflation, resulting in lower spending on food.

Northern Europe's imports from Central America and Southern Africa are relatively high (9% and 5%). Imports from South America, North Africa, West Asia and West Africa are relatively moderate. Imports from North Africa, South and Central Asia, and East Asia (China) grew relatively fast.

The largest markets in this region are characterised by a relatively high purchasing power, which allows for consumers' relatively generous spending on FFV. These main markets are dominated by large retail chains that maintain high standards of quality and food safety. Denmark and Sweden are important markets for organic fruit and vegetables.

Eastern Europe is a good market for price-competitive fruit and vegetables

Eastern Europe's main market is Poland. Romania and Czechia are also important markets, although only half the size of the Polish market. Bulgaria, Slovakia and Hungary are far behind these top-3. Hungary's imports increased by 12% per year on average. Polish imports also grew (+3.5%), followed by Bulgaria (+2.1%) and Romania (+1.9%). West Asia is a relatively strong supplying region to Eastern Europe due to its proximity, accounting for 7% of the region's total imports.

Relatively low volumes come from South and Central America and from North, Southern and West Africa. Supply from North Africa gained the most (+13% per year, +63 thousand tonnes in total). Imports from Central America, Southern Africa and South Asia also grew relatively fast (+37, +10, +5 thousand tonnes respectively). By contrast, imports from West Africa declined considerably (-21 thousand tonnes).

Daily consumption of fruit and vegetables in Eastern Europe is moderate and mostly oriented to its own produce. Price is important because of a lower purchasing power than in Western Europe. This offers opportunities for price-competitive supplies from developing countries. Quality requirements are developing quickly in the region but are not yet as advanced as in Western Europe.

In 2018-2022, a lot of products showed a relatively strong export development to this region, e.g. fresh or chilled leguminous vegetables, arrowroot, sweet potatoes, fresh or chilled vegetables, durians, strawberries, papayas and blueberries. Direct import of these products from developing countries to Eastern Europe is certainly there too, but relatively underdeveloped. Most of it comes from other European countries.

Southern Europe offers opportunities for traditional and tropical products

Southern Europe is a traditionally strong production region for fruit and vegetables. In Spain, Italy and Portugal, [daily consumption is far above average](#), especially of fruit. Consumers in this region often consider taste to be more important than the visual quality of the product. Imports complement local production but also cater to an increasing consumption of tropical fruits.

Spain has become the largest importer in the region, a position previously held by Italy. Together, Italy (3.2 million tonnes) and Spain (3.6 million tonnes) dominate the region in terms of import volume and also production. Portugal's import volume is less than half of Italy's. The import volumes of Greece, Croatia and Slovenia are in turn approximately one-third of Portugal's.

Southern Europe imports relatively large volumes from South and Central America, North Africa and West Africa.

Relatively small volumes come from West Asia and South Africa. Products that showed a relatively strong export development to this region include peas, edible mushrooms (all types), sweet potatoes, aubergines, arrowroot, avocados, dates, blueberries, mangos and bananas. Most of the exotic products in this list are sourced directly in developing countries.

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 UK 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 increasing imports of tropical fruit 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 (July 2023)

The Netherlands, Germany and France (Western Europe), Italy and Spain (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). 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 almost 3.2 million tonnes in 2021, dropping slightly to about 3.0 million tonnes in 2022. Imports from developing countries performed second-best of the six focus countries (+2.2% on average per year, +250 thousand tonnes in total).

Because of the Netherlands' function as a European hub for trade in FFV, the country is good for more than 18% of Europe's imports from developing countries. For imports from other countries outside Europe, this share is even higher (24%). From the port of Rotterdam, the main entry point, Dutch and international traders distribute produce to the rest of Europe. The highest concentration of fruit and vegetable traders is on the south side of Rotterdam.

The Netherlands is an important exporter/re-exporter of fresh (exotic and other) fruit. It is the leading European destination for fruit exports from South America, Southern and East Africa, and South and Southeast Asia. This is

different for vegetables: most of the Dutch fresh vegetable consumption and export consists of locally grown potatoes, onions, and greenhouse vegetables such as tomatoes and paprika.

Table 1: Top-6 products from developing countries with strong export performance to the Netherlands in 2018-2022

	Absolute growth in 2018-2022 (thousand tonnes)
Fruits of the genus capsicum	+22
Tomatoes	+11
Pears	+3.6
Cucumbers	+6.4
Raspberries	+12
Carrots	+4.4

Source: UN Comtrade (July 2023)

The following products/developing country origins performed particularly strongly in terms of exports to the Netherlands:

- Bananas from Ecuador and Colombia (+159 and +56 tonnes)
- Fresh grapes, oranges, plums from South Africa (+57, +28, +12 thousand tonnes)
- Fresh blueberries, exotic fruits from Peru (+45.8, +8.8 thousand tonnes)
- Fresh or dried avocados from Colombia (+23 thousand tonnes)
- Onions and shallots, and mandarins from Egypt (+9.8, +2.2 thousand tonnes)
- Tomatoes from Tunisia (+7.0 thousand tonnes)
- Fresh mangoes from Burkina Faso (+3.1 thousand tonnes)
- Fresh or chilled onions and shallots from Morocco (+2.8 thousand tonnes)
- Fresh exotic fruits from Ghana (+1.2 thousand tonnes)
- Fresh or chilled vegetables, and watermelons from Senegal (+0.9 and +0.5 thousand tonnes)

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.

Since Belgium, Germany, France and the United Kingdom are the four main export destinations for 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.

[Inflation in the Netherlands](#) is forecast to be among the highest of Europe's largest markets in the short-to-medium term. 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 list of the Fresh Produce Centre](#). This centre represents fruit and vegetable companies that account for over 80% of total sales in the Netherlands.

United Kingdom: strong direct imports from developing countries

The United Kingdom is highly dependent on external supply, and a record share of 46% of the total import volume comes directly from developing countries (in 2022 this exceeded 2.5 million tonnes). This makes it the second European market for exporters from developing countries, behind the Netherlands and ahead of Germany. The country is the largest European destination for exports from Central Africa, and the second largest for exports from Southern Africa, the Caribbean, South Asia, East Asia and East Africa.

UK imports had the worst performance of all six focus countries, but this was mostly due to the large drop in intra-European imports. The import volume from developing countries increased slightly (+0.7%). A positive indicator for the long-term development of total fresh fruit and vegetable imports is the population index. The UK'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 UK and has made trade slower and more expensive. Consequently, imports from the EU declined from 3.4 million tonnes in 2019 to 2.6 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 (Brexit)

In Spring 2023, the UK government presented a draft 'Border Target Operating Model' for all goods imported into the country. Part of it is a new, risk-based model of SPS checks for food, animal and plant products, to be rolled out from late 2023. New Safety and Security declarations for EU imports will be required from late 2024. A Single Trade Window will simplify the way importers can provide information to the government.

While imports from EU countries may involve more formalities in the next few years, the [UK trade agreements with non-EU countries](#) may offer new opportunities to fresh fruit and vegetable exporters in various developing countries.

Table 2: Top-6 products from developing countries with strong export performance to the United Kingdom in 2018-2022

	Absolute growth in 2018-2022 (thousand tonnes)
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Bananas	+119
Grapes	+62
Blueberries	+57
Oranges	+5.7
Mangoes	+10
Exotic fruits	+11

Source: UN Comtrade (July 2023)

The following products/developing country origins performed particularly strongly in terms of exports to the United Kingdom:

- Fresh strawberries from Morocco and Egypt (+9.4, and 5.6 thousand tonnes)
- Fresh watermelons from Brazil (+11 thousand tonnes)
- Fresh raspberries from Morocco (+14 thousand tonnes)
- Cucumbers and gherkins from Morocco (+4.7 thousand tonnes)
- Fresh or chilled leguminous vegetables from Morocco (+3.8 thousand tonnes)
- Fresh coconuts from Côte d'Ivoire (+1.5 thousand tonnes)
- Fresh or chilled beans from Senegal and Egypt (+2.1, and +1.3 thousand tonnes)
- Fresh or chilled vegetables from Kenya (+2.3 thousand tonnes)
- Fresh or dried mangoes from Mali, Ghana and Senegal (+1.4, +1, and +0.9 thousand tonnes)

The UK 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 UK, 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 UK is forecast to be among the highest of Europe's largest markets in the short-to-medium term. 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 UK, 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 UK on the [GOV.UK website](#). Another page gives [updates on the EU-UK trade agreement](#).

Germany: The largest market for fresh produce

Germany has over 83 million inhabitants and a strong purchasing power. The country has the largest consumption of FFV in Europe. In 2022, German companies imported a total volume of 8.4 million tonnes of FFV,

which is more than 15% of the European total. It was however a decline compared to 2018. Although German imports peaked at a record high of 9.4 million tonnes in 2021, the rising inflation caused a drop of import and consumption in 2022 (-10% annual change).

Direct imports from developing countries were 2.4 million tonnes in 2022. Only tomatoes (+134 thousand tonnes) and dates (+12 thousand tonnes) from developing countries went up substantially. Overall, imports from developing countries only rose by +1.4% per year.

The following products/developing country origins performed particularly strongly in terms of exports to Germany:

- Sweet potatoes from China (+6.2 thousand tonnes)
- Fresh peaches, including nectarines, from Morocco (+1.4 thousand tonnes)
- Fresh or dried dates from State of Palestine (+0.4 thousand tonnes)

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.

Inflation in Germany is forecast to be among the highest of Europe's largest markets in the medium-to-long term (2024-2028). While the high inflation in 2022-2023 has already impacted the organic market negatively, this premium market will remain under pressure due to the high inflation that strongly impacts premium markets.

Tip:

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

Spain: Europe's garden and potential trade hub

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.

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. Spain is the second-largest European destination for exports from North Africa, West Africa and Southeast Asia.

In 2018-2022, imports from developing countries grew with a CAGR of 3.3% to 1.6 million tonnes. This was the largest growth of the six focus countries. The highest growth however was for intra-European imports (+6.7% per year; second highest, behind France). This was mainly due to rising imports of large volume products, such as cucumbers, oranges, pineapples and apples.

If we further zoom in on individual products, only products from developing countries had an above-average growth.

Table 3: Spanish import products from developing countries with above-average growth

Product	Import growth in thousand tonnes
watermelons	+21
strawberries	+15
fresh or chilled beans	+5.1
raspberries	+14
sweet potatoes	+11
mangoes	+6.2
arrowroot and similar roots and tubers	+4.9
cucumbers and gherkins	+4.4
fresh or chilled leguminous vegetables	+3.9

The following products/developing country origins performed particularly strongly in terms of exports to Spain:

- Fresh watermelons, potatoes and sweet potatoes from Morocco (+52, +5.7 and 1.3 thousand tonnes)
- Fresh or chilled potatoes from Egypt (+7 thousand tonnes)
- Fresh or dried oranges from Zimbabwe (+7 thousand tonnes)
- Mangoes from Brazil (+12 thousand tonnes)
- Onions and shallots, melons and tomatoes from Senegal (+5.3, +1.0, and +0.4 thousand tonnes)
- Fresh or dried pineapples from Panama, Côte d'Ivoire and Ghana (+6.1, +3.3 and +0.3 thousand tonnes)

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.

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.

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 Northwest African suppliers

France has the second-largest population in Europe, making it one of the main target markets for fresh produce exporters. In 2022, France imported 1.5 million tonnes of fruit and vegetables from developing countries, a -5.8% average annual decline since 2018. This was only 26% of total imports, the lowest share of all six focus countries. The weak performance was the result of a 35% drop in 2020 due to the Covid pandemic. Since then, imports from developed countries have experienced growth every year.

It is a clear trend that France imported less produce from outside Europe directly. The category 'rest of world' declined too, by as much as -17% per year. By contrast, imports from other European countries went up by 8.6% per year. The largest impacted products were kiwis from New Zealand and apples from Chile. In the category of developing country imports, the most impacted products/origins were oranges and grapefruit from South Africa, bananas from Cameroon, Dominican Republic, Ecuador and Costa Rica, and avocados and mangos from Peru.

France has local production of seasonal produce such as apples, beans, peas, onions and stone fruit. Part of the local produce is cultivated organically. France is the most important European destination for exports from North and West Africa.

Three products from developing countries had a strong growth in 2018-2022:

- pineapples (+3.8 thousand tonnes),
- mangoes (+12 thousand tonnes),
- potatoes (+12 thousand tonnes).

The following products/developing country origins performed particularly strongly in France:

- Tomatoes, watermelons and mandarins from Morocco (+138, +49, +5.3 thousand tonnes)
- Mandarins, cabbages, kohlrabi, kale and similar brassicas from Egypt (+2.4, and +0.2 thousand tonnes)
- Fresh or dried pineapples from Kenya (+1.2 thousand tonnes)
- Fresh exotic fruits, fresh or chilled peas from Tunisia (+0.3, and +0.2 thousand tonnes)
- Fresh or chilled aubergines (eggplant) from Uganda (+0.3 thousand tonnes)
- Cassava from Côte d'Ivoire (+0.2 thousand tonnes)

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.

Inflation in France has been high in 2022 and 2023, but compared to other European countries it has remained and will remain on the low side. The impact 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, the UK and Germany).

Tip:

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

Italy: convenience helps to sell tropical fruit

Italy is the sixth-largest importer from developing countries, ahead of Poland. The country is an important producer and exports part of production. Italy is the fourth-largest European destination for exports from South America. The import volume from developing countries decreased by 2.2% per year to 1.1 million tonnes in

2022, a share of 33% of total imports. This share is higher than in Germany and France (lower than 30%), but much lower than in the UK, Spain and the Netherlands (with shares higher than 40%).

Overall, from developing countries only bananas (+17 thousand tonnes) had a strong performance. Other products with a high growth were all from intra-European origin: tomatoes (+22 thousand tonnes), pears and quinces (+52 thousand tonnes), oranges (+28 thousand tonnes), kiwifruit (+33 thousand tonnes), watermelons (+4.4 thousand tonnes) and mushrooms of the genus 'Agaricus' (+6.1 thousand tonnes)

The following products/developing country origins performed particularly strongly in terms of exports to Italy:

- Bananas from Peru (+7.4 thousand tonnes)
- Bananas and arrowroot and similar roots and tubers from Ghana (+4 and +1 thousand tonnes)
- Fresh or chilled vegetables, watermelons and peaches, incl. nectarines from Tunisia (+4.6, +3.0, and +0.2 thousand tonnes)
- Fresh or chilled vegetables from Egypt (+1.6 thousand tonnes)

Italy is neither an important organic nor a fairtrade market for fresh fruit and vegetables, although it is believed to be larger than the Spanish market. 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.

Tip:

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

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

This chapter highlights six examples of promising products to give you an idea of the potential in the European market: sweet potatoes, blueberries, kiwifruit, avocados, aubergine and watermelons. These six products were defined based on performance in 2018-2022 (Annex 1) and on a review of drivers for growth. Drivers for growth can be related to consumption trends and availability.

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 26% per year in 2018-2022. The popularity of sweet potatoes is reflected in a strong growth of imports to the following European regions:

- Western Europe: sweet potatoes from South America (+3.2 thousand tonnes), North Africa (+52 thousand tonnes), Southern Africa (+4.0 thousand tonnes) and East Asia (+10 thousand tonnes).
- Northern Europe: sweet potatoes from South America (+2.5 thousand tonnes)

The following developments stand out from the analysis of 2018-2022 trade statistics:

- German imports of sweet potatoes from China (+6.2 thousand tonnes)
- Spanish imports of sweet potatoes from developing countries in general (+1.3 thousand tonnes)

Egypt (+43% per year, +81 thousand tonnes), China (+14%, +14 thousand tonnes), South Africa (+75%, +9.3 thousand tonnes), Peru (+54%, +2.3 thousand tonnes), Brazil (+10%, +1.4 thousand tonnes) and Uganda

(+10%, +300 tonnes) experienced the highest growth in sweet potatoes exports to Europe. With the huge growth in 2018-2022, Egypt has become the second-largest non-European supplying country to Europe, behind the USA.

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 UK, 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 (+36% per year, +13 thousand tonnes). 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 UK. Egypt is one country that exports fairtrade-certified sweet potatoes.

Blueberries

Imports of blueberries from developing countries grew by 30% per year in 2018-2022. 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.

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. The popularity of blueberries is reflected by a strong growth of imports from South America, North Africa, Southern Africa, Southern Europe and Eastern Europe.

Peru, Morocco and South Africa dominated the supply to Europe in 2022, together supplying 180 thousand tonnes, good for 93% of all blueberries coming from developing countries. Serbia, Ukraine and Zimbabwe follow as suppliers. These countries export much smaller volumes to Europe, yet registered high growth (Serbia +81% per year and +3.4 thousand tonnes in total, Ukraine +18% and +1600 tonnes, Zimbabwe +45% and +1400 tonnes).

Figure 13: Blueberries from Ukraine sold in a supermarket in the Netherlands, August 2023



Source: Photo by [Globally Cool](#)

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 also 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.

Kiwifruit

The largest non-European kiwi suppliers are New Zealand and Chile. Kiwi is high in vitamin C and its improved quality supports consumption. The licensed Zespri kiwi is the leading brand and has become increasingly popular in European retail.

Imports of kiwifruit from developing countries grew by 3.2% per year in 2018-2022. The largest import growth took place in Western Europe and most importantly to the Netherlands. British and Italian import growth was relatively high too. If we look at supplying regions, the largest growth was recorded by imports of kiwifruit coming from West Asia and Southern Africa.

Turkey (+23% per year, +1,400 tonnes), South Africa (+57%, +300 tonnes) and Argentina (+3.8%, +200 tonnes) experienced the highest growth in kiwifruit exports to Europe.

The availability of certified kiwifruit is very limited. Fairtrade-certified kiwifruit is hardly or not available, while organic kiwifruit is available in the leading organic markets, although in limited volumes. One origin country for organic kiwifruit is Argentina; others are Chile and Peru, and in Europe Italy and (southern) Switzerland. The most important markets for organic kiwifruit are in Western and Northern Europe.

Avocados

Avocado remains a fast-growing product on the European market. Imports of avocados from developing countries grew by 6.6% per year in 2018-2022. A period of very high growth (2016-2021) of European avocado imports was followed by a slow-down. In 2022, import volumes only grew by 2.9 thousand tonnes. In the near future exporters must consider stronger fluctuations in margins due to a larger influx and temporary oversupplies.

Peru (+7.4% per year, +90 thousand tonnes), Colombia (+24%, +46 thousand tonnes), Morocco (+27%, +34 thousand tonnes), Kenya (+14%, +26 thousand tonnes), Tanzania (+25%, +7.3 thousand tonnes), Dominican Republic (+15%, +5.1 thousand tonnes) and Zimbabwe (+4.7%, +800 tonnes) experienced the highest growth in avocado exports to Europe. Supply volumes from South Africa and Mexico are also considerable, yet these volumes dropped in 2018-2022.

Overall, European avocado imports from the North Africa, East Africa and Caribbean regions recorded the largest growth. Avocado imports from Central America to Eastern Europe grew in particular. The region with the highest growth of avocado imports in 2018-2022 was Western Europe. The popularity of avocado in Western Europe led to a strong growth of imports of avocados from Colombia, Morocco and Kenya (+35, +23 and +20 thousand tonnes). Another region with high growth was Southern Europe.

The leading markets for organic avocados are also 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.

Aubergine

Lower consumption of meat, especially in Western Europe, offers opportunities for fruit and vegetables that can replace meat. Aubergine is one of the vegetables that can be used as a meat replacer. The common aubergine is a popular vegetable in Europe, but there is also a growing demand for niche varieties. Turkey is the main supplier of common purple and long aubergines to Europe, and experienced a high growth of exports to Europe in 2018-2022 (+12% per year, +4.5 thousand tonnes).

Imports of aubergines from developing countries grew by 6.2% per year in 2018-2022. Although this was a much higher growth than imports from within Europe, most aubergines still come from within Europe. In

addition to Turkey, other developing countries that experienced a growth in exports to Europe were Burkina Faso (+21%, +300 tonnes), Uganda (+12%, +300 tonnes) and North Macedonia (+3.0%, +100 tonnes).

An interesting development in 2018-2022 that stands out is the growing French imports of aubergines from Uganda (+300 tonnes). Overall, the largest growth in imports to Europe was registered by aubergines from West Asia, North Africa and West Africa. The largest growth in imports within Europe was registered to Southern Europe.

More exotic varieties include Thai aubergine, mini aubergine, and Japanese or white aubergine. Several of these special varieties are sourced in Thailand (250-350 tonnes per year), Kenya (1,000-1,700 tonnes per year but declining by 12% on average per year), Uganda (+12%), and several smaller supply countries in West Africa.

The leading markets for organic aubergines are in Western Europe (Switzerland, Germany, France, the Netherlands), followed by Northern Europe (UK, Sweden, Denmark). Most organic aubergines come from within Europe (e.g. Spain, Switzerland). Fairtrade aubergines are hardly available, if at all.

Watermelons

Imports of watermelons from developing countries grew by 8.4% per year in 2018-2022. 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 by 21 thousand tonnes in 2018-2022. Especially Spanish imports of watermelons from Morocco grew strongly (+52 thousand tonnes in 2018-2022).

The limited availability of Spanish watermelons also had an impact on other European markets, leading to a strong growth of imports to the following European regions:

- Western Europe: watermelons from South America (+5.9 thousand tonnes) and South Asia (+1.3 thousand tonnes)
- Northern Europe: watermelons from South America (+12 thousand tonnes), Central America (+7.3 thousand tonnes) and Southern Europe (+7.2 thousand tonnes)
- Eastern Europe: watermelons from Central America (+1.2 thousand tonnes)

The following developments stand out from the analysis of 2018-2022 trade statistics:

- Dutch imports of watermelons from Senegal: +500 tonnes.
- British imports of watermelons from Brazil: +11 thousand tonnes
- French imports of watermelons from Morocco: +49 thousand tonnes
- Italian imports of watermelons from Tunisia: +3.0 thousand tonnes

Morocco (+12% per year, +111 thousand tonnes), Turkey (+21%, +48 thousand tonnes) and Albania (+30%, +15 thousand tonnes) experienced the highest growth in watermelon exports to Europe. Ukraine's exports of watermelon to Europe declined from 13-16 thousand tonnes per year before the war to only 100 tonnes in 2022. Senegal's exports of watermelon to Europe remained rather stable with volumes at 12-15 thousand tonnes per year.

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.

Main drivers of future opportunities

The analysis of [Annex 1](#) on strong performing products from developing countries to Europe is a good basis for defining high-potential products for the next few years.

At the same time, keep in mind that the fresh fruit and vegetable industry is large and very diverse. Analysing all the different products on HS 6-digit level can give you a broad idea of the most promising products for the European market. And consider that the true potential of a product also depends on factors like quality, price, volumes and supply window.

Consumption trends

Opportunities for export growth in the next few years can be driven by trends in consumption, for example [sweet potatoes](#), blueberries and raspberries in 2018-2022. Popularity may have a lot of reasons, such as health benefits attributed to products or presentation benefits (this is one of the drivers for the mini vegetables market). Such popularity can also relate to other trends, such as:

- Increasing consumption of healthier fats, like the vegetable fats in [avocado](#) or broccoli.
- Increasing consumption of protein-rich food, like fresh or chilled leguminous vegetables.
- Increasing consumption of exotic products, like [cassava](#) and [other roots and tubers](#), or exotic varieties of certain products (e.g. [aubergine](#)).
- Increasing demand for convenience, offering opportunities for e.g. seedless [grapes](#) varieties or easy-peeling fruits. Also, it has led to a booming market for pre-cut and packed fresh fruit in Western Europe.
- Increasing demand for healthy snacks, offering opportunities for snack vegetables like cherry tomatoes.
- Increasing demand for products with low pesticide residues. This can be an opportunity for some products like [pineapples](#) and [mangoes](#) that are typically low in pesticide residues.
- Lower consumption of meat, especially in Western Europe, offers opportunities for fruit and vegetables that can replace meat, e.g. mushrooms, [aubergine](#), jackfruit, [beans](#) and legumes, [peas](#), lentils, cauliflower and beets.
- Lower consumption of sugar, which is to some extent replaced by sugar from fruits. [Dates](#), for example, can be applied as a sweetener in several products.

The following products have good opportunities to benefit from these trends: kiwifruit, papayas (especially to Southern and Eastern Europe), sweet potatoes (mostly to Western Europe), avocados (mostly to Eastern and Southern Europe). These fruits have experienced strong growth in exports to Europe because of their nutritional values. They will likely remain in high demand for the coming years.

Availability

- Short-term lack of availability of products from Europe or other main supplying regions. This factor remains rather unpredictable and varies from season to season. At the same time, heatwaves in Southern Europe in recent years have seriously impacted e.g. Spanish output of watermelons. Also, in the next few years there is a serious chance that Spanish production of watermelons will turn out lower than usual.
- Year-round demand for specific fruits and vegetables has been driven by the supply by counter-seasonal origins of fruit from Asia or from southern-hemisphere countries like South Africa, Peru and Chile. With their mix of supply windows there are practically no supply gaps throughout the year for many products anymore.
- Successful expansion of cultivation area in certain regions or countries, for example recently in Morocco and Peru. Exporters from both countries show that it is possible to force growth in Europe by offering competitive and quality products combined with strong promotion.

Fruits and vegetables that have had a reduced European availability include onions, tomatoes, mandarins and cucumbers:

- Vegetable imports that may benefit from reduced European availability: onions (all European regions) and tomatoes (all regions except Eastern Europe). After a lower European harvest of onions in 2022, the forecast for 2023 is that the output will not recover either. For tomatoes, European production in 2022 was also lower than usual and it is uncertain when production will recover to previous levels. Because of this forecast of low local availability, imports of both products will remain relatively high.
- The European market for mandarins, including clementines, will offer opportunities from time to time, depending on availability from other countries and price competitiveness. Best opportunities will remain in Southern and Eastern Europe. Since mandarins have become a popular year-round on-the-go fruit snack, European demand will remain high. There are interesting chances for organic-certified mandarins to Western Europe, since their availability in Europe is still relatively low.
- The availability of cucumbers in Europe has been under pressure in 2022-2023 due to high energy prices. At the same time, cucumbers have gained in popularity as a healthy snack. This gives cucumbers a good chance of remaining in the top-10 imported products to Western, Southern and Northern Europe in the next few years. One of the most interesting target markets for cucumbers will remain the United Kingdom, since local production will further drop and imports from outside Europe will further increase.

Trending fruit and vegetables with chances for organic certification for Western Europe

Trending fruit and vegetables with interesting chances for organic certification for Western Europe:

- 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, the best opportunities in the European market are for organic-certified blueberries.
- Imports of peaches and nectarines and fruits of the genus Capsicum or Pimenta both depend on European availability to a certain extent. To maintain a sustainable export flow to the European market, the best chances are for organic-certified produce. This is to guarantee a low level of pesticide residues (which is typically high on these products).

One important note for the organic market: the challenging economic situation in several European countries (high inflation) is forecast to have a negative impact on prices that consumers are willing to pay for organic produce.

Tips:


Look into competitive advantages you may have compared to exporters from other countries regarding trade policy. 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 which specific varieties they are most interested in buying. 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 different climate zones in Peru and Colombia to fill in a wide supply window of avocados and blueberries. This type of specialisation will give you a stronger negotiating position in Europe.

Monitor market growth carefully for fast-increasing global production volumes. Fast growth can result in oversupply and depleting margins.

Increase your attractiveness as a supplier by offering combined shipments and a wider assortment. For example, combine the supply of several niche products or combine small exotic fruit with other more common products.



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

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