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

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The European processed fruit, vegetables and nuts market is showing the first signs of recovery after a few years of decline due to price inflation. European production is not sufficient to meet demand, creating opportunities for suppliers from developing countries. Countries with the best business opportunities and that import the most processed fruit, vegetables and nut products are Germany, the Netherlands, France, the United Kingdom, Spain and Italy. Cashew nuts, dates, frozen fruit, olive products, tropical fruit purées and coconut products are those with the most potential.

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

Europe is by far the largest world market for processed fruit and vegetables, absorbing nearly half of world supplies. Europe is an attractive market due to its size and its good prospects for suppliers from developing countries.

Europe is the largest and most expensive market for processed fruit and vegetables

Europe is the world's largest market player in processed fruit and vegetables, absorbing more global supplies than the other continents. In 2023, European imports of processed fruit and vegetables accounted for 47% of global imports in value. Asia came second, with 26%, followed by North America with 18%, Latin America and the Caribbean with 4%, Africa with 3% and Oceania with 2%.

Source: ITC TradeMap

Note that where this study refers to 'Europe', this means the 27 member states of the European Union plus the United Kingdom (UK), Switzerland, Norway, Iceland and Liechtenstein. Developing countries are defined as the countries listed as official development assistance recipients.

Imports from Europe are expected to grow at a slower rate than imports from other regions such as Africa and Asia. Economic growth projections in Africa and Asia are higher than for Europe, as their markets are growing more rapidly. Nevertheless, Europe continues to be an attractive market for sustainable and value-added products. For example, average import prices for processed fruit and vegetable products in Europe are around

15-30% higher than in Africa or Asia.

Due to its continental climate, Europe is limited to producing and processing continental fruit, vegetables and nuts. This means consumption of processed tropical and subtropical fruit and tropical vegetables and nuts is entirely dependent on imports. The prices of most imported tropical products are moreover higher than those of local European products. For instance, the import price of dried mangoes is nearly double the price of dried apricots, and the import price of macadamia nuts is almost three times higher than of walnuts.

Imports from developing countries are increasing

Between 2019 and 2023, the value of imports of processed fruit and vegetables into Europe grew annually by 5%, however import volumes remained relatively stable. The higher growth in value was a result of price inflation caused by the war in Ukraine. In 2023, the value of imported processed fruit, vegetables and nuts reached €44 billion. Approximately 75% of all processed fruit and vegetables imported from outside Europe came from developing countries. In 2023, these imports from developing countries reached a value of €12.7 billion.

Source: Eurostat COMEXT and Trade Map

Developing countries account for almost a third of the European trade in processed fruit and vegetables, and this share is growing steadily. Furthermore, the majority of intra-European trade consists of re-exports of processed fruit and vegetables originally imported from developing countries. European imports of processed fruit and vegetables from developing countries are expected to grow at an annual rate of 4% to 6% in the next five years, varying by product category.

Price stabilisation

In the past four years, global events have had a huge impact on European imports of processed fruit and vegetables, resulting in price increases since 2020. The first price rise occurred in 2021 and 2022 (due to Covid-19). Major product categories experienced price increases due to multiple lockdowns, lower production and increased freight rates, especially from Asia. Covid-19 also led to increased demand for ‘immunity boosting’ foods such as those rich in vitamins C and D.

Price inflation continued in 2022 and 2023 due to the energy crisis caused by the Ukraine war. Import volumes for most products were higher in 2023 than in 2022, however, and in 2024 prices started to stabilise. In 2024, average import volumes were expected to return to pre-price inflation levels. However, within product categories, cheaper products are gaining more market share. For example, in the edible nuts category, the total market share of cheaper nuts such as peanuts grew faster than of more expensive nuts such as cashew and macadamia nuts.

Europe is well-equipped for importing processed fruit and vegetables

The most important ports for processed fruit and vegetables in Europe are Hamburg (Germany), Rotterdam (the Netherlands), Felixstowe (the United Kingdom), Antwerp (Belgium), Algeciras (Spain) and Marseille (France). The largest European port is the Port of Rotterdam, which provides logistics for foreign exporters. Many companies specialised in handling and storing processed fruit and vegetables have their own terminals in the Port of Rotterdam. The ports of Antwerp and Hamburg also have substantial relevance for this sector.

Some terminals at the ports of Antwerp and Rotterdam are specifically designed for handling juices. They have pipes and pumps for transferring juice from ships to storage containers. They also offer other services such as temperature control, aseptic storage tanks, equipment for crushing frozen products, filling and mixing devices, loading equipment and laboratories. Several companies in the frozen fruit and vegetables sub-sector also have their own terminals in Antwerp and Hamburg and are specialised in the handling and storage of frozen products.

The Port of Algeciras in Spain is increasingly being used to rapidly transport North African imports to other European regions. This port was ranked the most efficient container port in Europe by the Container Port Performance Index (CPPI).

Demand for sustainable products is increasing

Several niche market segments offer opportunities for products that are sustainably produced. For example, production that applies specific agricultural methods or is environmentally friendly. Also in this category are production systems that guarantee fair payment of farmers, respect for human rights and good labour conditions. There are also a growing number of products which explicitly claim they meet specific dietary needs, such as free of gluten, sugar or artificial colours.

Organic market continues to decrease

According to data from the European Commission, total imports of organic processed fruit and vegetables (including fruit, vegetable and nut oils) decreased from 345 thousand tonnes in 2022 to around 320 thousand tonnes in 2023. This decrease is the result of the price inflation mentioned earlier. Table 1 shows the top ten most imported types of organic processed fruit and vegetables in 2023.

Table 1: Top ten organic products imported into Europe from non-European countries in 2023

Rank	Product	Import volume (in tonnes)
1	Extra virgin olive oil	45,311
2	Bulk packed canned and preserved fruit	22,454
3	Dried sultanas	14,482
4	Cashew nut kernels	14,462
5	Concentrated apple juice (Brix value >67)	13,075
6	Bulk packed tropical fruit purées and preparations	12,625
7	Dates	12,517
8	Other fruit juices with Brix value <=67 (excluding citrus and tropical)	11,025
9	Frozen orange juice (Brix value <=67)	10,759
10	Frozen strawberries	8,962

Source: Autentika Global, based on Eurostat data

Although total import volumes of organic products are decreasing, some organic products are actually gaining market share. Examples of organic products with strong import growth rates are extra virgin olive oil, banana pulp, hazelnuts, concentrated tomato paste, tropical and citrus juices, coconut oil, mango pulp, grape juice and peanut butter.

Organic certification schemes are increasingly popular in Europe. Once a niche market, organic products are now becoming mainstream. Many European countries have several retail chains specialised in exclusive sales of organic products. Boosting organic food production and consumption is also part of official EU strategy to achieve Sustainable Food Production. Among other things, this EU strategy aims for 25% of EU agricultural land to be under organic farming by 2030.

Source: Autentika Global, based on Eurostat data

The leading suppliers of organic processed fruit and vegetables to Europe are Tunisia (olive oil, dates), Türkiye (dried grapes, apple juice, sour cherry juice, dried apricots), Serbia (frozen raspberries), Ukraine (frozen wild blueberries), Ecuador (banana pulp), Mexico (frozen orange juice), Sri Lanka (coconut milk, coconut oil), China (peanuts), Costa Rica (banana pulp), the Philippines (coconut oil), Peru (passion fruit juice) and Morocco (frozen strawberries, frozen tomato).

The growth of sustainability certification

As sustainability is a broad term with many elements, there is no single standard sustainability certification covering all of them. Currently, there are over 230 eco-labels in use in Europe. One common practice is to state CO2 emission rates on products, though such claims are difficult to verify. The European Commission published a proposal for a Directive on Green Claims in 2023 in order to standardise voluntary green claims.

According to KANTAR SIAL insights, consumers are increasingly concerned about sustainability issues. Among consumers they surveyed, 40% said they have made radical behaviour changes for environmental or ethical reasons, and 54% seek out sustainable companies and brands.

According to Fairtrade International, global sales of Fairtrade-certified products in 2024 were comparable to figures for 2023. There are around 1,910 Fairtrade-certified producer organisations in 68 countries. As of October 2024, the FLOCERT database listed more than 5.9 thousand certified companies, an increase of around 100 companies compared to 2023. The largest increase is in the category of cashew nuts.

- Fairtrade (one word) – is a trademarked term that refers to Fairtrade International system certification.
- Fair trade (two words) – is a fair system of trade that helps and promotes responsible producers.

Table 2: Number of Fairtrade-certified companies in the processed fruit and vegetables sector in 2024

Product category	Number of certified organisations in 2022	Number of certified organisations in 2023	Number of certified organisations in 2024	Top products and number of certified companies in 2024
Dried fruit	134	127	131	Dried mango – 70 Dried banana – 36 Dried pineapple – 41 Raisins – 33 Dates – 28
Dried vegetables	2	3	3	Dried tomato – 1
Fruit juices and purées	122	116	121	Mango pulp – 60 Orange juice – 66 Mango juice – 54 Pineapple juice – 38 Passion fruit juice – 35
Edible nuts	264	284	300	Cashew nuts - 198 Almonds – 67 Brazil nuts – 56 Peanuts – 52
Oilseeds and Oleaginous fruit	328	354	354	Coconut for processing – 55 Olive oil – 23 Shea butter – 31

Source: FLOCERT (October 2024)

European processed fruit and vegetable production insufficient to meet demand

European countries do not have the weather conditions needed to cultivate tropical fruit and vegetables and therefore depend heavily on imports from tropical and semi-tropical countries. Only a few types of processed fruit and vegetables have any significant production in Europe. The strongest import dependency is in dried fruit and edible nuts, where the share of domestic production in total consumption is less than 10%.

Table 3: Trade balance of the most produced processed fruit and vegetables and edible nuts in Europe, including intra-European trade, 2023

Product	Leading European producers	Import volume 2023, in thousand tonnes	Leading non-EU suppliers	Export volume 2023, in thousand tonnes	Trade balance
Extra virgin olive Oil	Spain, Italy, Greece	751	Tunisia, Morocco	987	236
Jams, jellies and marmalades	Italy, France	601	Türkiye, India, Serbia, Mexico	734	133
Concentrated apple juice	Poland	489	Moldova, Türkiye, China, Ukraine, Serbia	485	-4
Canned pears	Italy, Spain	68	China, South Africa, Argentina	43	-25
Tomato purée	Italy, Spain, Portugal	1,441	China, USA, Ukraine, Türkiye	1,430	-11
Tomatoes preserved whole or in pieces	Italy	1,156	Türkiye, USA	1,686	530
Canned peaches and nectarines	Greece	225	China, South Africa	342	117

Canned apricots	Greece, Spain	70	Morocco, South Africa, China	55	-15
Canned beans and pulses	Italy	708	Lebanon, Türkiye	836	128
Table olives	Spain, Greece, Italy	564	Morocco, Türkiye, Egypt, Albania	731	167
Frozen vegetables	Belgium	7,875	China, Egypt, Türkiye, Ecuador, Chile	10,652	2,777
Frozen berries	Poland	729	Serbia, Ukraine, Morocco, Egypt Bosnia and Herzegovina	371	-358
Prunes	France	67	Chile, USA, Argentina, Serbia	33	-34
Hazelnut kernels	Italy	198	Türkiye, Chile, Georgia, Azerbaijan	40	-158
Walnuts	France	206	USA, Chile, Ukraine, Moldova	73	-133

Source: Eurostat, ITC Trade Map and industry sources

As table 3 shows, most products are not produced in sufficient volumes in Europe to meet European demand. Volumes of European domestic fruit and vegetable processing also show no clear upward trend. Suppliers outside Europe are therefore needed to satisfy European market demand. This creates opportunities for producers of hazelnuts, walnuts, frozen berries, prunes, figs, apple juice and canned pears.

Developing-country suppliers should be aware that they face strong competition from traditional supplying countries. For example, apple juice is mainly imported in huge quantities from China, prunes from the USA, Chile and Argentina, frozen fruit from Serbia and Egypt, and walnuts from the USA and Chile.

Tips:

- Regularly check the European Juice Market Reports, INC Statistical Yearbook (available by subscription) and PROFEL statistics to keep informed about the latest market developments.
- Compare your products and company with competitors from other supplying countries. Use the ITC Trade Map to find exporters in different countries and to compare prices, market segments, quality and target countries.
- Explore opportunities for individual products by reading CBI product-specific studies.
- See examples of how to stand out in the CBI study on doing business with European buyers of processed fruit and vegetables.
- Increase the value of your offer by making it exclusive and distinctive.

European competition is limited

Processed fruit and vegetable production is limited in Europe, although a number of countries produce large amounts of certain products. The largest European fruit and vegetable processors are Spain, France, Italy, Portugal and Greece.

Spain is the leading supplier of olive oil and table olives in Europe. It also produces and exports other products, such as canned fruit, citrus fruits, frozen and canned vegetables, almonds, processed tomatoes, and jams and purées. Spain is also the leading producer of citrus fruit in Europe. Most citrus fruit is sold fresh, but around 20% is processed into juices.

Italy is the largest European producer and exporter of processed tomato products, including canned tomatoes, pastes, purées and juice. The country is a large producer of canned beans, hazelnuts, table olives, Mediterranean pine nuts and dried figs. Italy is also the world's second-largest exporter of olive oil. However, Italian domestic production does not cover this volume of exports, and the country therefore imports almost double the amount it exports. In addition, it is the world's largest exporter of not-from-concentrate grape juice.

France is the leading producer of canned vegetables in Europe, and home to Bonduelle, the French-owned leading supplier of European canned products. France is also a significant producer and exporter of, among other products, jams, walnuts, prunes and fruit juices. For example, it is the largest European processor of imported pineapple juice. It also has a strong frozen food offer. For example, Picard Surgelés, a producer and retail distributor of frozen products, has over 900 stores in France.

Greece is the world's leading supplier of canned peaches and apricots. It is also the second-largest European producer of dried figs and table olives, and a leading supplier of dried grapes (currants).

Poland is the leading supplier of frozen raspberries, strawberries and sour cherries in Europe. It is also a leading producer of processed apple juice and apples. Prices of Polish apple juice tend to be higher than of apple juice imported from China thanks to a more favourable balance of sugar and acidity.

Some other relevant suppliers are Belgium (frozen vegetables), Bulgaria (cherries preserved in alcohol), Portugal (tomato purée) and Hungary (frozen sweetcorn).

Tips:

Visit European trade fairs to find trading partners. The major European trade fairs are: SIAL in Paris, Anuga in Germany and Biofach for the organic market segment in Germany. FI Europe is another interesting trade fair for finding potential trade partners, as it is specifically dedicated to food ingredients.

Find opportunities by contacting large European food processors to learn if they import ingredients directly or are supplied through importers.

Look for opportunities in small to medium markets in Europe, specifically the growing markets in Central and Eastern Europe.

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

Germany and the Netherlands are Europe's main importers of processed fruit and vegetables, making them interesting focus markets. Both markets get large shares of imports from developing countries. The Netherlands re-exports most imported products. Germany is also a significant re-exporter, but also the largest consumer and processor of imported products. Italy, the United Kingdom, Spain and France are other promising markets, with large shares of imports supplied by developing countries.

Source: Eurostat COMEXT and Trade Map

Germany is the largest European market for processed fruit and vegetables and edible nuts

Germany is by far the largest importer of processed fruit and vegetables in Europe, with an import value of €9.2 billion in 2023, accounting for 21% of all European imports in this category. More than half of these imports are from other countries in Europe, while 32% of direct imports come from developing countries. In terms of value, edible nuts are the largest product group in German imports. In terms of volume, canned and preserved fruit and vegetables are the leading product category.

Source: ITC Trade Map

Germany is the leading market in Europe for edible nuts. Although it is not a significant edible nuts producer, Germany has good opportunities for suppliers from developing countries. Within the edible nuts category, cashew nut kernels offer especially good opportunities for suppliers from developing countries, as Germany is the largest European importer and market for this product. It is also one of the leading chocolate processing markets, creating good opportunities for hazelnut suppliers.

German imports of canned and prepared fruit and vegetables come mostly from other European countries. The best opportunities in this category for suppliers from developing countries are in tropical fruit purées (mango and avocado in particular), pickled cucumber, prepared soybeans, capsicums (sweet and chilli), table olives, canned asparagus and canned pineapples.

Germany is also Europe's leading fruit juice market, with a very strong and growing organic juice offer. Even more popular than tropical and citrus flavours is apple juice, mainly sourced from China and Poland. The tropical juice category has excellent opportunities for suppliers from developing countries, due to strong import growth. Not-from-concentrate and organic juices are other top-performing categories. Drinks ingredients such as purées and frozen fruit, curcumin and ginger also provide good opportunities for suppliers from developing countries.

Serbia, Türkiye, China, Brazil and Vietnam are the leading developing countries supplying processed fruit and vegetables to Germany. Türkiye is a very strong supplier of several products due to its large production and population and trade network with Germany. In this sector, dried grapes, hazelnuts, dried apricots and pickled vegetables are Türkiye’s main exports to Germany. Türkiye also supplies Germany with processed paprika products such as pepper-based condiments and spreads, as well as jarred peppers in vinegar solutions.

Dried goji berries, dried vegetables (including mushrooms), canned fruit (such as lychee) and frozen vegetables are the leading products in this sector imported to Germany from China. Orange juice is predominantly imported from Brazil while cashew kernels are imported largely from Vietnam.

According to the CBI trends study, German suppliers are actively searching for new sourcing origins in order to ensure sufficient supplies and be less impacted by climate-related changes. Some developing-country suppliers with the highest export growth rates to Germany in the 2019-2023 period included:

- China (dried and frozen vegetables)
- Egypt (frozen strawberries, in-shell groundnuts, dried onion)
- Vietnam (passion fruit juice, frozen tropical fruit, canned lychee)
- Ukraine (concentrated apple juice, tomato purée)
- South Africa (dried sultanas, pickled chillies)
- Tunisia (dates, dried tomatoes, olive oil)

Sustainability niche market segments in Germany

Germany strongly supports sustainability and is Europe's biggest market for organic products. It also has the highest rate of packaging waste recycling in Europe, at 160 kg per capita annually. The country’s The Green Dot (Der Grüne Punkt) labelling system is one of the most successful recycling initiatives globally, requiring producers and retailers that use more non-recyclable packaging to pay a higher fee for the ‘Green Dot’ label.

As Europe’s largest market for organic products, Germany offers good opportunities for organic processed fruit and vegetable suppliers. Germany imported 416 thousand tonnes of organic food in 2023, approximately 18% of which was organic processed fruit and vegetables. Germany’s top organic processed fruit and vegetable imports in 2023 included dried sultanas (5.6 thousand tonnes), crude palm oil (4.9 thousand tonnes), cashew nuts (4.6 thousand tonnes), dates (4 thousand tonnes), crude coconut oil (3.6 thousand tonnes) and frozen strawberries (2.7 thousand tonnes).

The Netherlands: the trade hub of Europe

The Netherlands is Europe’s second-largest importer of processed fruit and vegetables from developing countries. However, most of these imports are not consumed within the country but are re-exported to other markets in Europe. While it may seem attractive to sell directly to end-recipients instead of going through Dutch importers, many end-recipients import smaller quantities and refuse to import from anywhere but Europe. This makes the Netherlands a very attractive export destination.

Source: ITC Trade Map

Fruit juices is the largest processed fruit and vegetable category imported by the Netherlands. Within this category, the top import product is concentrated orange juice from Brazil. Other popular juices are lemon, grapefruit and tropical juices (passion fruit, pineapple and mango). The juice market is quite concentrated and major bottlers (such as Refresco) are supplied directly by large companies in Brazil and elsewhere. Nonetheless, some opportunities can be found in the supply of superfruit ingredients, frozen fruit and purées.

The Netherlands is Europe's leading importer of shelled groundnuts (peanuts) and the second-largest cashew nut market, offering excellent opportunities for suppliers from developing countries. It is important to note that the Netherlands is mainly a transit country for imported nuts, which are re-exported to other European countries. Pecan nuts are also interesting for export, as the Netherlands is the largest European market for pecan nuts, although the US dominates this market.

Some developing-country suppliers to the Netherlands in the 2019-2023 period included:

- Brazil (orange juice, groundnuts)
- Vietnam (passion fruit juice)
- Egypt (dried onions, frozen strawberries, in-shell groundnuts)
- South Africa (orange juice, grapefruit juice, pineapple juice, dried grapes)
- Nicaragua (peanuts)
- Lebanon (pickled cucumbers)

The sustainability market and other initiatives in the Netherlands

The Netherlands is also an important European market for retail sales of Fairtrade products. According to the International Trade Centre (ITC), in a survey of 550 European retailers, German and Dutch companies were the most committed to making corporate sustainable sourcing pledges. The Netherlands also has various sustainability initiatives, such as the Sustainable Trade Initiative, or IDH. IDH has developed several sustainability programmes for edible nuts and juices (in partnership with the European Fruit Juice Association).

The United Kingdom: the largest consumer of dried fruit

The United Kingdom (UK) is the second-largest European market for processed fruit and vegetables and third-largest importer in this sector from developing countries. The country is a leading European importer of dried fruit and canned and frozen vegetables. Leading suppliers from developing countries to the UK are Brazil (orange juice), China (groundnuts and frozen vegetables) and Türkiye (dried grapes, canned vegetables, pickled cucumbers and dried apricots).

In 2023, imports of processed fruit and vegetables to the United Kingdom reached 2.9 million tonnes and a value of €5.2 billion. Quantities were lower in 2023 compared to 2022 but the import value was higher, indicating price inflation. The leading import product by value was extra virgin olive oil (€257 million), followed by orange juice with less than 20 °Brix (€256 million), canned tomatoes (€247 million), frozen vegetables (€175 million) and canned vegetables (€160 million).

The UK is the largest importer of dried grapes (81 thousand tonnes in 2023). Tropical fruit and berries processed in various forms (frozen, juice, purée) provide good opportunities for suppliers from developing countries, as the UK is the largest market in Europe for smoothies and one of the largest for coconut water.

Some developing-country suppliers with the highest growth rates to the UK in the 2019-2023 period included:

- China (frozen vegetables)
- Vietnam (juice from passion fruit, frozen mango, coconut water)
- Brazil (groundnuts, orange juice)
- Philippines (coconut milk, coconut water)
- Nicaragua (groundnuts)
- Indonesia (canned pineapples)

Sustainability market and initiatives in the United Kingdom

The UK is the largest Fairtrade market in Europe, with more than 400 companies licensed to use the Fairtrade logo on their products. The UK's organic market is also growing steadily. The total organic market grew 2% in 2023, ending the year at €3.8 billion. Supermarket sales of organic products reached a value of €2.3 billion, up

2.7%, following a downturn in 2022.

France: the leading consumer of walnuts and dates

The French market for processed fruit, vegetables and edible nuts is almost as large as the UK market. Processed fruit and vegetable imports to France decreased slightly in 2019 due to price inflation. In 2023, France imported 3.1 million tonnes of these products, at a value of €5.9 billion. France's leading suppliers are other European countries: Belgium (frozen vegetables), Spain (orange juice, frozen vegetables), Germany (apple juice) and Italy (preserved tomatoes).

The leading developing countries exporting to France in this segment are Brazil, Türkiye, Morocco and China. Orange juice is mostly supplied by Brazil. The top export products from Morocco to France are canned apricots, table olives and frozen strawberries. Türkiye mainly supplies hazelnuts, dried apricots and grapes and pickled cucumbers. China supplies frozen vegetables, canned exotic fruit, dried mushrooms and canned bamboo shoots.

The fruit juice segment provides opportunities for pineapple juice suppliers, as France is a leading consumer of this product in Europe. The apparent consumption (disparity between imports and exports) of pineapple juice reached 39 thousand tonnes in 2023. In the category of edible nuts, France is Europe's largest consumer of walnuts, but a considerable share is produced domestically (more than 13 thousand tonnes in 2024). In the dried fruits category, there are specific opportunities in supplying dried apricots, dates and dried figs, as France is the leading importer and user of these products in Europe. France is also Europe's largest importer of table olives.

Some developing-country suppliers with the highest export growth rates to France in the 2019-2023 period included:

- Brazil (orange juice, peanuts)
- Türkiye (dried apricots, hazelnut paste)
- Egypt (frozen strawberries, table olives, preserved artichoke hearts)
- Algeria (dates, olive oil, table olives)
- Vietnam (frozen tropical fruit, canned tropical fruit)
- Cameroon (canned green beans)

Spain: a strong importer of North African products

Spain is the sixth-largest importer of processed fruit and vegetables in Europe and an important re-exporter to other European countries. Spain is also a strong producer of several product types in this sector, for example table olives, olive oil and almonds. In 2023, Spanish imports of processed fruit, vegetables and nuts reached 1.6 million tonnes and a value of €3.9 billion. Imports from developing countries account for 37% of this total.

Tunisia, Türkiye, Peru and Morocco are the leading suppliers in developing countries. Tunisia's main exports in this segment are dates and olive oil. Peru is a strong supplier of canned asparagus and artichokes. Türkiye is Spain's leading supplier of olive oil, hazelnuts and sultanas. Morocco supplies table olives, frozen strawberries and olive oil.

Some developing-country suppliers gaining a market share in Spain in the 2019-2023 period included:

- Peru (olive oil, pickled chillies)
- Türkiye (canned capers)
- Egypt (in-shell peanuts)
- Argentina (olive oil, peanuts, prunes)
- Tunisia (olive oil, dates)
- India (cashew nuts, dried onions)

Italy: both importer and producer

Italy is Europe's fifth-largest importer of processed fruit and vegetables, but differs from other top importers in that it is also a major producer and processor of fruit and vegetables. Besides producing the leading products in this sector itself, it imports them to ensure steady supplies. Leading suppliers to Italy are Spain, Türkiye, Greece and China.

The leading products exported from Spain to Italy are almonds and olive oil. The main products imported from Greece are table olives, olive oil and canned peaches. Türkiye's major export to Italy is hazelnuts, most of which is intended for international confectionary companies. An example is Ferrero, which uses hazelnuts as an ingredient in sweet spreads. Tomato purée is the major Chinese import, used to complement the Italian production of purées and tomato sauces (tomato passata).

Italy is the largest European market and processor of chestnuts, table olives, hazelnuts and processed tomatoes. It is also the second-largest producer and largest importer of olive oil in Europe. Within this sector there are specific opportunities in organic olive oil. Italy also uses sizable quantities of pine nuts for the production of pesto, though other comparatively cheaper nuts, such as cashews and almonds, are often substituted. Organic and vegan products have a very high market growth in Italy.

Some developing-country suppliers gaining a market share in Italy in the 2019-2023 period included:

- Egypt (frozen strawberries, table olives, canned artichokes)
- Iran (tomato purée)
- Vietnam (cashew nuts, tomato purée)
- Serbia (frozen sour cherries, frozen raspberries, hazelnuts)
- Ukraine (frozen raspberries, frozen mushrooms)
- Albania (olive oil, chestnuts)
- Ukraine (frozen wild blueberries)

Tips:

Study your options in the relatively large import markets in the Netherlands, Germany, the UK and France. These markets are particularly interesting due to their size and significant import volumes from developing countries. The best place to start are the CBI product studies for processed fruit and vegetables and edible nuts.

Study examples of developing countries that are gaining a market share in Europe. If you are a producer of any of the products mentioned here, compare your offer with that of your competitors and try to implement similar strategies to take your products to the European market.

Invest in more sustainable production processes to increase your opportunities in the European market. Read more about sustainability trends in the CBI trends report.

Other potentially promising markets

Poland and Belgium are the only two countries in Europe that can be considered medium-sized importers of fruit and vegetables. The major Belgian imports in this segment are orange juice, canned mushrooms and frozen vegetables. Poland is a strong importer of preserved tomatoes, groundnuts and frozen fruit. Both countries also produce many of the same products they import, using imports to supplement domestic production. For example, Belgium is both the largest producer of frozen vegetables in Europe and a large re-exporter of these products. Poland is also a significant frozen fruit producer.

Austria is another market with opportunities for suppliers in developing countries. Although the Austrian population is relatively small compared to other European markets, its fruit juice processing industry is well-developed and provides opportunities for developing countries to supply raw materials, such as purées, concentrated juices and frozen fruit. The Austrian Agrana group owns Austria Juice, the world's leading producer of fruit preparations.

Last and most importantly, Central and Eastern Europe have been showing the strongest growth in processed fruit and vegetable imports. Among the countries in this region, Slovakia, Romania and Croatia showed the strongest import increases, with an average annual growth rate of 12% between 2019 and 2023. The top import product in this segment in Romania is table olives, in Slovakia fruit purées, and in Croatia olive oil.

3. Which products from developing countries have the most potential in the European processed fruit and vegetable market?

The products from developing countries that have the most potential in the European market are frozen fruit (tropical fruit and berries), canned tropical fruit (especially pineapple), dates, tropical dried fruit (such as pineapple and mango), cashew nuts, coconut products (desiccated coconuts, coconut water, coconut milk and coconut oil) and olive products (olive oil and table olives). It is important to note that besides the selected six most promising product categories with the highest import values in Europe, there are many more products offering opportunities for developing-country suppliers.

Methodology:

These results are based on data about high-potential products from developing countries where CBI is active, providing calculations of export volumes of these products to markets in Europe. Also note that the European market is here defined as EU27 plus the UK plus the European Free Trade Association. The processed fruit, vegetable and edible nuts sector is large and complex (see figure 7). Suggested products have been selected from each sub-sector

Source: Eurostat COMEXT and Trade Map

Cashew nuts

European cashews nut imports are growing, thanks mostly to the consumer trend towards eating healthier food. Demand for cashew nuts in Europe is being driven by the popularity of healthy snacking, their pleasant taste and use of nuts as substitutes for animal proteins. The Netherlands, Germany, the UK, Italy, France and Spain are the largest European markets for cashews. Central and Eastern Europe are smaller but growing markets, also offering opportunities especially for new suppliers.

Table 4: European imports of cashew nuts, in € million

Imports from the world	Imports from developing countries	Imports from the 2024 CBI country list

Total value 2023	Annual growth rate 2019-2023	Total value 2022	Annual growth rate 2019-2023	Share from developing countries	Total value 2023	Annual growth rate 2019-2023	Share from CBI countries
1,417	-1%	1,131	-2%	80%	168	34%	12%

Source: Eurostat and ITC Trade Map

The volume of European cashew nut imports has increased at an average annual rate of 6% since 2019 to reach 15 thousand tonnes in 2023. Almost all imports from outside Europe are from developing countries. In 2023, European imports of cashew nuts increased by 3 thousand tonnes relative to 2022. In the next five years, the European market for cashew nuts will likely grow at an annual rate of 5-6%. Imports from developing countries dominate, accounting for around 80% of total European imports. Overall, most cashew nut imports came from Vietnam and India. Although African countries are the largest producers of raw in-shell cashew nuts, their processing capacities are still insufficient to directly supply Europe. Instead, they export their raw in-shell cashew nuts to India and Vietnam for further processing. This practice makes products imported into Europe less traceable, and more European importers are seeking to source cashew nuts directly from the countries of origin.

African countries have started investing in processing facilities and are gaining market share. Côte d'Ivoire, Nigeria, Tanzania, Benin, Burkina Faso, Ghana, Mozambique, Togo and Guinea-Bissau are emerging cashew kernel suppliers to Europe.

The sustainable production of cashew nuts is gaining importance in Europe. Several large traders have joined the Sustainable Nut Initiative to promote traceability and sustainability in the cashew nut supply chain. Also, several international organisations and projects are supporting the processing and export of cashew nuts from Africa. They include African Cashew Alliance (ACA), ComCashew and CBI projects in Côte d'Ivoire and Benin.

Tip:

- Learn more about the European market potential in the CBI cashew nuts study.

Canned and preserved tropical fruit and vegetables

Europe is the world's largest importer of canned and preserved fruit and vegetables, accounting for 46% of the world's imports. This product category is the only one with substantial growth in imports and consumption despite the negative influence of price inflation. This is because canned products are often considered 'crisis food' due to their long shelf life.

Germany, the Netherlands, the UK and France are strong consuming and importing countries and offer the best opportunities for suppliers from developing countries. Natural, low-sugar and organic products are the main market drivers. Canned and preserved fruit and vegetables offer unique opportunities for selling a retail-ready product in this segment that is rare due to the specific production process involving sterilisation. Most products in this product category are further processed after import.

Table 5: European imports of canned and preserved fruit and vegetables, in € million

Imports from the world		Imports from developing countries			Imports from the 2024 CBI country list		
Total value 2023	Annual growth rate 2019-2023	Total value 2023	Annual growth rate 2018-2022	Share from developing countries	Total value 2022	Annual growth rate 2018-2022	Share from CBI countries
14,287	9%	3,442	10%	24%	556	11%	4%

Source: Eurostat and ITC Trade Map

Within this group, canned pineapples is the largest product category imported from developing countries. Between 2019 and 2023, imports of canned pineapples grew by an annual rate of 4% in value but remained relatively stable in volume, which is an indication of higher import prices. Indonesia is the leading supplier to Europe, followed by Thailand, Kenya and the Philippines.

Table 6: European import of canned pineapples, in € million

Imports from the world		Imports from developing countries			Imports from the 2024 CBI country list		
Total value 2023	Annual growth rate 2019-2023	Total value 2023	Annual growth rate 2019-2023	Share from developing countries	Total value 2023	Annual growth rate 2019-2023	Share from CBI countries
370	4%	283	3%	76%	130	3%	5%

Source: Eurostat and ITC Trade Map

Countries that supply other tropical products in this category include:

- China – canned lychees, water chestnuts, sweet preserved ginger, bamboos shoots, asparagus
- Türkiye – canned paprika and chillies, pickled cucumber
- India – canned mangoes, canned mango purée, canned carry pastes
- Peru – canned artichokes
- Morocco – table olives, preserved tomatoes
- Egypt – table olives, preserved tomatoes

Canning processing lines require high investments. Small and medium suppliers can therefore find more opportunities by offering these products in bulk packaging, such as barrels, drums or bags in aseptic filling. The European market for canned tropical fruit is retail-oriented and dominated by a relatively small number of suppliers. The product range is also quite limited, with canned pineapples accounting for more than 90% of the whole product category.

Private label products and ethnic supermarkets are the best options for new suppliers. Examples of well-established ethnic Asian supermarket chains selling canned tropical fruit in Europe are Tang Frères (France), Wah Nam Hong (the Netherlands), Wing Yip (the United Kingdom), Go Asia (Germany) and Hoo Hing (UK).

Tip:

Read more about opportunities in the European market in the CBI canned fruit and vegetables report.

Frozen fruit (berries and tropical fruit)

The increasing popularity of smoothies as a healthy breakfast option, combined with large industrial demand, are the leading drivers of growing interest in frozen fruit in Europe. Demand for frozen berries, also considered 'superfruit', is growing due to the growing popularity of vegan diets, convenient and easy-to-prepare meals, and functional ingredients. Frozen tropical fruit and frozen berries are also used as ingredients in the production of jams, marmalades, fruit preparations, pastry fillings and more.

Table 7: European imports of frozen fruit, in € million

Imports from the world		Imports from developing countries			Imports from the 2024 CBI country list		
Total value 2023	Annual growth rate 2019-2023	Total value 2023	Annual growth rate 2019-2023	Share from developing countries	Total value 2023	Annual growth rate 2019-2023	Share from CBI countries
11,286	6%	3,585	10%	32%	1,383	13%	12%

Source: Eurostat and ITC Trade Map

Europe is the largest frozen food market in the world, making up one third of total global imports. Large importing and consuming countries such as the Netherlands, Germany, the UK, France and Belgium offer opportunities for exporters from developing countries. As Europe's leading organic market, Germany offers specific opportunities for organically certified frozen fruit. The Netherlands is Europe's largest importer of frozen tropical fruit.

Frozen berry imports and consumption are particularly significant in Europe. By volume, the most consumed products in this segment are strawberries, followed by blackberries, raspberries and blueberries. Frozen berries are also a popular superfruit and widely used in healthy drinks (smoothies). Other products that have grown significantly are frozen cubes and purées of tropical fruit such as papaya, mango and passion fruit.

Leading suppliers of frozen berries from developing countries to Europe are Serbia (sour cherries, raspberries and blackberries), Morocco (strawberries), Egypt (strawberries) and Ukraine (wild blueberries). The leading suppliers of frozen tropical fruit are Peru (papaya and mango), Vietnam (durian, mango, passion fruit), India (coconut meat, mango pulp), Mexico (pineapple, mango) and Ecuador (banana and banana purée).

Tip:

Read more about the European market potential in CBI studies on frozen berries and frozen tropical fruit.

Dates and tropical dried fruit

Europe is an attractive market for subtropical and tropical dried fruits, and is wholly dependent on imports as weather conditions do not allow for production in Europe. Dates are particularly popular in Europe and demand for them is increasing. They are mainly popular for their sweetness and as a natural source of energy, sugar substitute, fruit bar ingredient and cooking ingredient. There are opportunities for this product in Italy, Spain, France, the UK, Germany and the Netherlands.

Europe's share of global date imports increased in value from 24% in 2019 to 31% in 2023. This volume reached 193 thousand tonnes in 2023, with a value of €533 million. Industrial use of dates and date paste as a natural sweetener is driving stable growth of these imports.

Table 8: European imports of table dates, in € million

Imports from the world		Imports from developing countries			Imports from the 2024 CBI country list		
Total value 2023	Annual growth rate 2019-2023	Total value 2023	Annual growth rate 2019-2023	Share from developing countries	Total value 2023	Annual growth rate 2019-2023	Share from CBI countries
533	6%	274	6%	51%	214	4%	40%

Source: Eurostat and ITC Trade Map

European countries do not produce dates, therefore the majority of dates are imported from developing countries. Suppliers from emerging origins have to compete with Algeria and Tunisia, which are the leading European suppliers. The most popular date varieties in Europe are Deglet Nour and Medjool, though other varieties are increasingly being imported from Pakistan, Iran and Saudi Arabia.

Imports of natural dried tropical fruit (with no added sugar) are increasing, though there are no official data or trade statistics on this. The most popular product in this category is dried mango, followed by dried pineapple. Europe imports around 7,000 tonnes of natural dried mango, with Ghana, Burkina Faso, South Africa and Côte d'Ivoire as leading suppliers. Imports of natural dried pineapple are estimated to amount to around 2,000 tonnes, with Ghana as the leading supplier.

Other 'exotic' dried fruits are dried (fried) banana chips and coconut chips. Dried kaki (persimmon) has also been added to the offer, sourced mostly from West and Central Asian countries (Azerbaijan). Most imported tropical dried fruit is still imported as sugar-infused or candied, with Thailand as the leading supplier.

Desiccated coconut and other coconut products

Europe is the world's largest importer of desiccated coconut. Desiccated coconut is a popular bakery and confectionery ingredient in Europe. In 2023, European imports of desiccated coconut reached 114,000 tonnes, with a value of €207 million. In 2023, direct imports from coconut-producing countries (all developing countries) amounted to 70,329 tonnes. The leading suppliers to Europe are the Philippines and Indonesia, followed by Malaysia, Sri Lanka, Ghana and Vietnam.

Table 9: European imports of desiccated coconut, in € million

Imports from the world		Imports from developing countries			Imports from the 2024 CBI country list		
Total value 2023	Annual growth rate 2019-2023	Total value 2023	Annual growth rate 2019-2023	Share from developing countries	Total value 2023	Annual growth rate 2019-2023	Share from CBI countries
207	1%	158	0.3%	76%	57	0.4%	27%

Source: Eurostat and ITC Trade Map

Other coconut products are also becoming increasingly popular in Europe due to their health benefits and the growth of veganism. The most popular products in this segment are dried coconut chips, coconut milk and water and coconut oil. There are no official statistics on coconut water and coconut milk. The European coconut water market is estimated to be over 600 million litres. In 2023, European coconut oil imports amounted to 737 tonnes, 75% of which was crude coconut oil.

Table 10: European imports of coconut oil, in € million

Imports from the world		Imports from developing countries			Imports from the 2024 CBI country list		
Total value 2023	Annual growth rate 2019-2023	Total value 2023	Annual growth rate 2019-2023	Share from developing countries	Total value 2023	Annual growth rate 2019-2023	Share from CBI countries
1,281	11%	719	9%	56%	226	20%	18%

Tip:

Read more about the European market potential in the CBI desiccated coconut study and the CBI coconut water study.

Olive products (table olives and olive oil)

Despite being the largest olive producer, Europe is also importing growing volumes of olive oil and olives because domestic production cannot satisfy demand. Europe is the world's largest importer of table olives, accounting for around half of total global imports. Between 2019 and 2023, European imports of table olives grew at a steady rate despite price inflation. Almost all table olives imported from outside Europe come from developing countries.

Table 10: European imports of table olives, in € million

Imports from the world		Imports from developing countries			Imports from the 2024 CBI country list		
Total value 2023	Annual growth rate 2019-2023	Total value 2023	Annual growth rate 2019-2023	Share from developing countries	Total value 2023	Annual growth rate 2019-2023	Share from CBI countries
1,109	7%	259	8%	23%	132	6%	12%

Source: Eurostat and ITC Trade Map

The main competitors for emerging table olive suppliers are in Europe, namely in Spain and Greece. Over 70% of all European table olives are supplied by these two countries. Leading non-European suppliers are Türkiye, Morocco and Egypt. Though ranked as the sixth-largest exporter, Italy actually imports more than it exports. Besides the leading producers of table olives, there are also emerging suppliers to the European market such as Argentina, Tunisia, Syria, Algeria, Lebanon, Peru, Israel, Chile and Jordan.

Table 11: European imports of olive oil, in € million

Imports from the world		Imports from developing countries			Imports from the 2024 CBI country list		
Total value 2023	Annual growth rate 2019-2023	Total value 2023	Annual growth rate 2019-2023	Share from developing countries	Total value 2023	Annual growth rate 2019-2023	Share from CBI countries
6,641	16%	944	24%	14%	638	16%	10%

Source: Eurostat and ITC Trade Map

The European olive oil trade accounts for more than half of the global trade. In the short term, the European olive oil market is expected to experience a temporary decrease. One reason for the expected drop is very low production due to hot, dry weather. Another reason is ongoing price inflation due to the energy crisis caused by the Ukraine war. In the long term, the European olive oil market is expected to grow at an annual rate of 3-5%.

Tip:

Read more about the European market potential in the CBI table olives study and CBI olive oil study.

Other products

Other products that have contributed to growth in Europe’s processed fruit and vegetable imports include tomato purée, almonds, pistachios, pickled vegetables, citrus juices, dried vegetables, pine nuts, pecans and other exotic nuts. Despite not being among the top six most promising products, these products are worth exploring.

Table 12: Other promising products for export to Europe

Product	Import share from developing countries	Annual import growth rate in value (2019-2023)	Main suppliers	Main CBI country suppliers
Freeze-dried berries	50%	16%	China, USA, Chile, Serbia	Egypt
Tomato purée	19%	22%	Italy, Spain, China, Portugal, Türkiye	Egypt, Tunisia, Morocco
In-shell groundnuts	50%	3%	Egypt, USA, China, Israel	Egypt, Uganda
Pickled cucumbers and gherkins	46%	8%	Türkiye, Peru, Greece, Poland, Hungary, Mexico	Egypt, Lebanon, Sri Lanka
Preserved (jarred) paprika and chilli	75%	12%	Türkiye, South Africa, India, Mexico	Egypt, Morocco, Lebanon
Canned artichoke hearts	28%	4%	Italy, Spain, Egypt, Peru	Egypt
Pineapple juice	65%	16%	Costa Rica, Thailand, Indonesia, Philippines	Indonesia, Kenya, Côte d'Ivoire
Canned beans	71%	4%	Belgium, France, Spain	Kenya, Jordan, Egypt

Dried papayas	90%	0%	Thailand, Philippines, Vietnam, Pakistan	Sri Lanka, Uganda
Mango purée	70%	10%	India, Mexico, Colombia, Brazil	Mali
Tropical fruit juices	91%	11%	Vietnam, Ecuador, Peru	Sri Lanka, Ghana

Two products for which demand is increasing but with no official statistical codes in the European import nomenclature are banana pulp and avocado pulp. The European market for avocado pulp is estimated to be around 20 thousand tonnes, with Mexico as the leading supplier. The European market for banana pulp is estimated to be around 50 thousand tonnes, with Costa Rica, Guatemala and Ecuador as leading suppliers. A number of African countries, including Kenya and Uganda, are also starting to export both products to Europe.

Products with high demand in Europe but that are challenging for emerging suppliers

There are a number of products for which the European market is growing but that could be challenging for new exporters to supply due to strong competition. Products that are more challenging for new exporters to supply to Europe due to a high market concentration and domination by large suppliers are:

- Almonds, mostly from the USA
- Frozen vegetables, mostly produced in Europe and imported from China
- Canned vegetables, mostly produced in Europe
- Retail packed jams, mostly produced in Europe
- Tomato purée, mostly produced in Italy and imported from China
- Orange juices, mostly from Brazil
- Apple juices, mostly produced in Poland and imported from China
- Hazelnuts, dried grapes and dried apricots, mostly from Türkiye
- Pistachios, mostly from the USA and Iran
- Pine nuts, mostly from China

Frozen vegetables, fruit juice mixtures, canned vegetables and canned tomato products are mainly produced and traded within Europe, with limited opportunities for non-European suppliers.

Products promoted as ‘superfoods’ are a very interesting category, which includes products offered as food and as ingredients for the food supplement markets. There is a growing market in Europe for products with strong health benefits. Some examples are:

- Frozen berries – blackberries, raspberries, blueberries, currants
- Spray-dried and freeze-dried powders – acai berries, maca, acerola, ashwagandha, soursop, baobab
- Juices and purées – berries, aloe vera, turmeric, pomegranate, noni, acerola, acai berry, ginger
- Dried fruit – goji berries, aronia, cranberries
- Dried mushrooms – Ganoderma, reishi, chaga

Tips:

- Read CBI's trends report to learn more about several trends influencing demand for processed fruit and vegetables in Europe, including meta trends around growing consumer interest in healthier lifestyle habits and sustainable sourcing.
- Learn more about the market potential for individual products in CBI's product factsheets.

Autentika Global carried out this study on behalf of CBI.