

# Entering the European market for canned beans

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Food safety certification, combined with reliable and frequent laboratory testing, can help create a positive image for canned bean producers wishing to export to Europe. Sustainable production and corporate social responsibility measures will help give emerging suppliers a competitive advantage.

## Contents of this page

1. [What requirements must canned beans meet to be allowed into the European market?](#)
2. [Through what channels can you get canned beans on the European market?](#)
3. [What competition do you face in the European canned bean market?](#)
4. [What are the prices of canned beans?](#)

## 1. What requirements must canned beans meet to be allowed into the European market?

### What are the mandatory requirements?

To export canned beans to Europe, exporters must meet strict food safety standards and requirements. Canned beans are covered by the [General Food Law](#), which governs food safety in the European Union (EU). This law focuses on food safety and traceability. Noncompliance may result in temporary import restrictions or tougher inspections. Suppliers must follow the principles of the [Hazard Analysis and Critical Control Points \(HACCP\)](#).

### Contaminant control in canned beans

Under European regulations, contaminants such as aflatoxins and lead, as well as microorganisms such as *Salmonella*, *E. coli*, and *Listeria monocytogenes*, must be absent or fall below set limits. For example, the allowable limit of lead contamination in pulse crops is [0.20 mg/kg](#) wet weight.

### Pesticide residues

[Maximum residue levels \(MRLs\)](#) apply to pesticides that may be used on canned beans. Herbicides that are commonly used, such as glyphosate, are being evaluated by a group of EU member states. Glyphosate is currently allowed in the EU until 15 December 2022, with a maximum residue level (MRL) of [2.0 mg/kg](#) in dry beans. Glyphosate is the most commonly used insecticide in bean cultivation. The maximum glyphosate residue level in beans is 0.1 mg/kg.

MRLs for organic dry beans and other beans used in infant food are substantially stricter.

### Legal requirements

All products sold in the [European Union](#), including canned beans and pulses, must be safe. This also applies to imported goods. Ingredients must be authorised. Hazardous pollutants, such as pesticide residues and high amounts of mycotoxins or preservatives, are prohibited. Labels must also clearly state whether items [contain allergens](#). Cans and other packaging materials must be corrosion-resistant and free of pollutants such as

cadmium.

## Food safety

Microbiological contamination is not a frequent problem in the European market due to optimised processing lines and the sterilising used in canned beans. However, physical and chemical contamination still occur.

Calcium disodium EDTA (E385), an additive used in canned beans and pulses, is an approved food additive in the European Union at a maximum level of 250 mg/kg. It is now being re-evaluated as a food additive, as required by [Regulation \(EU\) No 257/2010](#).

BPA's possible toxicity has been raised by various European Union member states, including Sweden, Denmark and France. [France outlawed the use of BPA](#) in goods that come into contact with food for infants and young children, such as feeding bottles, as from 1 January 2010. On 1 January 2015, France implemented a new regulation prohibiting the use of BPA in all food packaging.

### Tips:

Read more about pesticides, contaminants and microorganisms on the [website](#) of the European Commission. See the EU [MRL database](#) for maximum residue levels of pesticides and active substances in common dry beans.

Reduce pesticide levels through [integrated pest management \(IPM\)](#) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.

Read our study about [buyer requirements for processed fruit and vegetables](#) for a general overview of buyer requirements in Europe.

See the website of the [European Commission](#) for legal requirements for canned food.

To learn more about payment, delivery and other practical issues, read the CBI study on [Organising Your Export to Europe](#).

## What other requirements may buyers have?

### Quality requirements

The overall quality of canned beans is assessed on the basis of [several factors](#). Some of the most important are:

- Colour, look, flavour and taste: these are some of the most important quality criteria for canned beans. Quality may be judged based on the number of defects in the beans, such as loose skin, colour differences, blemishes, the number of broken beans, and presence the of beans (in green beans) or pods (in other types of beans) in the can.
- Size: canned beans should all be the same size. Sizing is not required but it is common.
- Cut: for green beans, there are various cuts, including short pieces, sliced lengthwise or diagonal.
- Brine: the composition and flavour of the brine or added sauce are also assessed throughout the testing process.
- Weight: there is a defined minimum drained weight for green beans. For other types of canned beans, the minimum drained weight is not defined.

## Tip:

See the [Codex Alimentarius](#) for practical guidelines to help you meet European food safety legislation requirements. For canned fruit and vegetables, they include: 'Guidelines Procedures for the [Visual Inspection](#) of Lots of Canned Foods for Unacceptable Defects', 'Code of [Hygienic Practice](#) for Canned Fruit and Vegetable Products', 'Code of Hygienic Practice for Low and Acidified Low-Acid Canned Foods' and 'Code of Practice for the Prevention and Reduction of Inorganic Tin Contamination in Canned Foods'.

## Certifications as a guarantee

[Food Safety](#) is a priority in all European food industries and food suppliers should expect customers to ask for certifications as an added guarantee. [Global Food Safety Initiative \(GFSI\)](#)-recognised food management systems and certifications are widely accepted throughout Europe.

Exporters that process beans (cleaning, drying, packaging) and want to become European suppliers need a recognised food safety management system. A minimum of one HACCP-based food safety management system must be in place.

The following types of certification are accepted, depending on the supplier's position in the supply chain (production, distribution or processing):

- [GLOBALG.A.P.](#) (for agricultural production)
- [Food Safety System Certification](#) (FSSC 22000/ISO 22000)
- [BRCGS](#) for Food Safety (British Retail Consortium)
- [IFS Food Standard](#) (International Featured Standard)

## Labelling requirements

The European Union Regulation on food labelling protects consumers from misinformation. [Allergens must be identified on the ingredient list](#). Allergen labelling requirements now extend to foods sold in bulk, including those served in restaurants and cafés.

Canned lupin beans are also considered an allergen and must be labelled as such. Sulphites, used in the manufacture of canned beans, are also allergens. If sulphite levels are over 10 mg/kg or 10 mg/l, it must be labelled as a possible allergen.

Canned beans and pulses are often manufactured with sauces and seasonings. Some spices, such as celery and cumin, are possible allergens and must be labelled as such. Canned bean and pulse labels must also provide nutritional information.

## European Green Deal requires sustainable trade

The [European Green Deal](#) is a set of new EU sustainability policies to make Europe the first climate-neutral continent by 2050. It will impact how resources are used and greenhouse gas emissions are cut in the coming years.

The Farm to Fork Strategy is key to the European Green Deal. It aims to make food systems more equitable, healthy and ecologically friendly. It will ensure sustainable food production and address issues such as packaging and food waste. The new approach will prioritise crops with a low environmental impact. This will benefit pulses, which are known to fix nitrogen in the soil.

EU trade agreements already contain requirements for the sustainable development of economic, environmental and social elements of trade with the dry bean-supplying countries of Canada, Ukraine and Mexico. More countries are expected to follow. Canned food suppliers should be ready to meet higher standards and lead with technological advancements.

### Tips:

Check with buyers to learn which certification scheme applies to your target market.

Read about social programmes and initiatives in the CBI study about [buyer requirements for grains, pulses and oilseeds in Europe](#).

Read in-depth about several food certification schemes and the added value of products in specific target markets. If certification is needed, consult with your preferred buyers about their certification preferences and carefully select a certifying company.

## What are the requirements for niche markets?

### Organic certification

[Certified organic](#) canned beans are part of a growing niche sector. Pulses are becoming more popular as a healthy choice among vegan and health-conscious customers, who often prefer organic products for the same reason. Several specialised European purchasers, notably [Tradin Organic](#) and [Rapunzel Naturkost](#), target this growing ecologically and socially responsible organic industry.

[All organic goods imported into the European Union must be accompanied by an electronic certificate of inspection](#) (e-COI) issued by an EU-accredited inspection authority. Inspections of organic products are being tightened to combat fraud. Foreign manufacturers are subject to the same laws as those in the European Union.

### Tips:

Organic is nice to have, but not a must-have. Do trials in this niche market first to find out if your business can compete. Starting organic production and getting certification can be expensive. To market organic products, your company has to comply with the whole organic process. Read more about organic certification in the CBI study about [buyer requirements for grains and pulses in Europe](#).

Read about organic farming and the European guidelines on the [European Union website for organic farming](#).

Find specialised organic importers in the [International directory of organic food wholesale & supply companies](#).

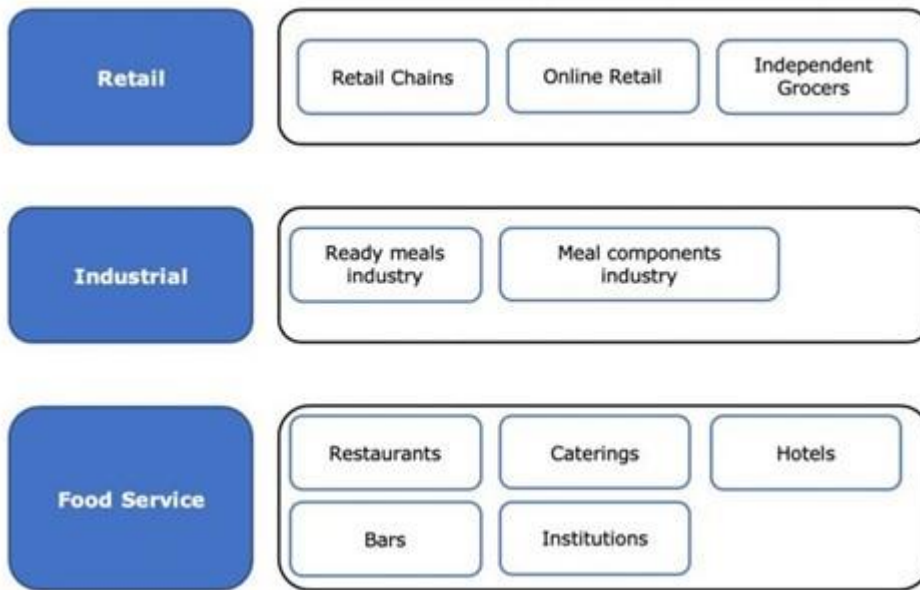
## 2. Through what channels can you get canned beans on the European market?

Compared to other areas of the fruit and vegetable processing market in Europe, canned beans are less widely used as ingredients.

## How is the end market segmented?

There are few exact figures for the volume of canned beans used in the food processing industry versus sold directly via retail.

Figure 1: End market segments for canned beans in Europe



Source: [CBI - Entering the European market for canned fruits and vegetables](#)

### Retail

Though some retailers purchase directly from exporters in developing countries, most transactions involve middlemen. The retail market has recently become more split between discounters and high-end segments. Key features defining the European retail food industry include [consolidation](#), market saturation, intense competition and low pricing.

European countries all have their own dominant retail chains. Based on turnover figures for the year [2020](#), those with the highest market shares are [Schwarz](#), [Aldi](#), [Carrefour](#), [Tesco](#), [Rewe](#), [Edeka](#), [E.Leclerc](#) and several other chains.

### Industry

Two of the main uses of canned beans in the food processing industry are:

- Ready meals: this segment is a large consumer of canned beans, mostly for [salads](#), soups and fresh and frozen meals.
- Meal components: a wide variety of canned beans are used as part of products manufactured by other food sectors.

### Food service

The hospitality and food service industry, which includes restaurants, hotels and catering companies, is typically supplied by specialised importers such as wholesalers. This industry usually requires customised packaging in the [1 to 5 kg](#) range, which is distinct from retail and bulk packaging.

## Tips:

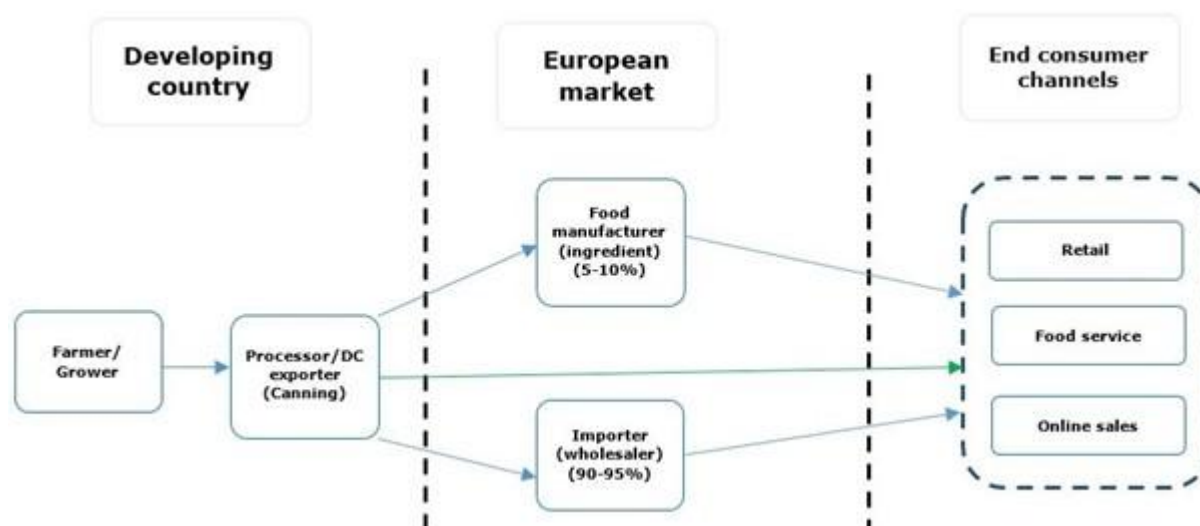
Follow developments in the European fruit and vegetable processing market on the news sections of the [European Association of Fruit and Vegetable Processors \(PROFEL\)](#) and [Legume Hub](#) websites.

Find potential buyers in the canned products segment in the lists of exhibitors at specialised trade fairs such as [Food and Drink Expo](#) and the [International Food & Drink Event](#).

## Through what channels do canned beans reach the end market?

The European food processing industry uses canned beans less than other vegetables in manufacturing food products. Large volumes of canned beans are either marketed directly in the retail market under importer brand names or private manufacturer labels, or sold directly to the food service segment. Importers are the single most important channel.

Figure 2: European market channels for canned beans



Source: [CBI - Exporting canned beans and pulses to Europe](#)

## Importers/wholesalers

The most important and thus recommended channel for entering this market is through specialised importers. In retail, canned beans and pulses are often sold in **400 g** cans. Exporters should get in touch with wholesalers that serve retail sectors directly to ensure consistent supply. The most popular distribution channels for suppliers from developing countries are specialised importers, such as for private labels or of ethnic products.

As consolidators and sourcing experts, importers and traders have a very strong position in specialised canned goods. Although in some situations suppliers can serve the retail market directly, without needing importers as middlemen, this is not common as the retail sector generally works with procurement procedures.

Canned bean importers in main European markets include [Natco Foods](#), [Gama](#), [Goodies Foods](#), [Indo European Foods](#), [S.O.P International](#), [Clama](#), [Kreyenhop & Kluge](#), [Henry Lamotte](#), [Opa Distribution](#) and [Agidra](#).

## Food manufacturers (ingredients)

Compared to other areas of the European food processing market, [canned](#) beans are less widely used as ingredients. Most canned goods are sold either directly in the retail sector under an importer's brand or private label, or to the food service sector. Both canned kidney beans and canned green beans are examples of types of canned beans used by the sector.

## Retail/food service

The European canned bean market is driven by the food service sector (restaurants, hotels and catering businesses), which makes up a sizeable share of the overall market. This market demands larger packaging, up to 5 litres, and standard grade rather than branded goods. In some circumstances, you can supply the food retail or food service markets directly, eliminating the need for an importer as a middleman.

The expanding European market for specific types of canned beans is an excellent business opportunity. [Ethnic](#) grocery stores sell a variety of foods from a range of countries, creating a growing customer base. Most of these retailers specialise in foods from a particular region, such as Asian, Arabic, Indian or Mediterranean.

The public sector is also a major food service customer and contracts suppliers through public procurements. Procedural constraints may make it difficult for suppliers to reach the food service sector directly. Instead, look for food service suppliers specialised in your specific market. In recent years, the food service industry has been negatively impacted by COVID-19-related travel restrictions, closures and declines in restaurant dining and hotel stays.

The leading food retail companies in Europe differ per country. The companies with the largest market shares are [Schwartz Gruppe](#) (Lidl and Kaufland brands), [Carrefour](#), [Tesco](#), [Aldi](#), [Edeka](#), [E.Leclerc](#), [Metro Group](#), [Rewe Group](#), [Auchan](#), [Intermarché](#) and [Ahold](#) (Delhaize, Albert Heijn and several other brands).

## What is the most interesting channel for you?

The most important channel for you are importers/wholesalers. They control up to 95% of the market and are the logical main point of entry, especially for new suppliers to the European market. Importers/wholesalers can give developing country suppliers information about market trends and practical guidance about exports. Supplying the retail market directly is highly challenging and requires large investments in quality, quantity and logistics. Bigger canned bean exporters can consider submitting tenders for major discount food retailer procurements.

### Tips:

Identify your product's main importers in large and fast-growing markets.

Check the website of [PROFEL](#), the European Association of Fruit and Vegetable Processors, for important information about the European processed fruit and vegetables market. The website provides links to the sites of its national member associations and local food processors and producers.

## 3. What competition do you face in the European canned bean market?

## Which countries are you competing with?

Italy, the Netherlands and France are the main competitors for emerging suppliers of canned beans to Europe. In 2021, these three countries supplied around 80% of all canned beans to Europe. The canned bean market is dominated by European producing countries. Italy, the Netherlands, France and Belgium are the key competitors in the main markets. Though small in comparison, Kenya and Madagascar are good examples of developing country competitors.

## Main competition is from Europe

### Italy: the leading supplier of canned beans to Europe

Italy alone accounts for more than half of all European canned bean exports and the market for these products is extremely concentrated in Europe. Both canned kidney beans and canned green beans are sourced mainly from Italy, making it the primary supplier in Europe and worldwide. Italy has a well-developed canning industry, but its primary focus is on processing tomatoes.

In 2021, Italy exported 155,942 tonnes of canned beans to the European market, compared to 131,120 tonnes in 2017. The top Italian export destinations for canned beans were Germany (38%), the Netherlands (16%) and Sweden (9%).

### The Netherlands: the fast-growing supplier

The Netherlands is one of the world's major exporters of [agricultural](#) products. It is the second-largest exporter of canned beans and also a major re-exporter of canned beans in Europe.

In 2021, the Netherlands exported 65,780 tonnes of canned beans to the European market, compared to 64,627 tonnes in 2017. The top Dutch export destinations for canned beans are Germany (38%), France (37%) and Belgium (14%).

### France: a canning hub for the local market

Canning is an important part of France's economy. This sector produces primarily for the domestic market, but for export as well. Canned peas account for a major share of these exports, followed by canned sweetcorn and [canned green beans](#). The majority of French canned goods are exported to neighbouring European markets, including Germany, Belgium and Italy.

One reason for France's enormous production is the French firm Bonduelle, which is a major player in this segment. Though based in France, Bonduelle also has canning operations in other European countries, including Hungary, Poland, Portugal and Spain.

In 2021, France exported 29,352 tonnes of canned beans to the European market, compared to 36,683 tonnes in 2017. The top French export destinations for canned beans are Germany (32%), Belgium (28%) and Italy (17%).

### Belgium: an emerging market

In 2021, Belgium exported 28,375 tonnes of canned beans to the European market, compared to 33,931 tonnes in 2017. The top Belgian export destinations for canned beans are Germany (50%), the Netherlands (34%) and France (8%).

## Supply from developing countries

Canned beans make up around [5%](#) of all canned products imported into Europe by developing country suppliers. In 2021, around 12% of all European canned bean imports came from developing countries. Kenya is

the leading developing country supplier to Europe, followed by Madagascar. Though small in comparison, Cameroon is a good example of an emerging competitor from developing countries.

### **Kenya: the leading developing country supplier of canned beans to Europe**

Kenya has an excellent reputation for the production and export of canned green beans, which is one of the country's specialisations. It is the major developing country supplier of canned beans and pulses to France. France is the top European importer of canned beans and pulses from developing countries.

In 2021, Kenya exported 26,564 tonnes of canned beans to the European market, compared to 28,045 tonnes in 2017. The top Kenyan export destinations for canned beans are France (67%), the Netherlands (17%), Belgium (12%) and Germany (4%).

### **Madagascar: an emerging developing nation**

In 2021, Madagascar exported 8,911 tonnes of canned beans to the European market, compared to 7,809 tonnes in 2017. The top Kenyan export destination for canned beans is France (89%), followed by Belgium (8%) and Germany (3%).

### **Cameroon: France-focused developing country supplier**

In 2021, Cameroon exported 2,296 tonnes of canned beans to the European market, compared to 3,127 tonnes in 2017. The main Cameroon export destination for canned beans is France, which accounted for almost all of its canned bean exports to Europe. Belgium also imported a very small amount, around 1 tonne.

### **China: an emerging competitor**

In 2021, China exported 1,447 tonnes of canned beans to the European market, compared to 2,083 tonnes in 2017. The main Chinese export destinations for canned beans are Germany (68%), the Netherlands (17%) and France (3%).

### **Lebanon: developing country supplier focused on the Netherlands**

In 2021, Lebanon exported 3,100 tonnes of canned beans to the European market, compared to 2,602 tonnes in 2017. The main export destination for Lebanese canned beans was the Netherlands (80%), followed by Germany (11%) and Sweden (6%).

#### **Tips:**

Find out which companies are main importers of your products in major or rapidly expanding markets.

If you export types of canned beans that are also cultivated in Europe, expect a lot of competition. Study how developing countries have brought other new products onto the European market to see what they did and what set them apart.

Consult sectoral groups and primary market information portals such as [IEGVu for in-depth knowledge about the canned bean business and the export strategies of rapidly developing countries](#).

Consider exporting canned goods that are not already produced in Europe.

Regularly attend major trade fairs in Europe, such as [ANUGA](#), [SIAL](#) and [Food Ingredients](#), to network with other businesses in your industry.

## Which companies are you competing with?

Major companies are often the best-known names in the global canning sector. Each has developed its own approach to exporting goods to the European market. The following are examples of companies that have been successful in supplying canned beans to the European market.

### European competitors

The main European competitors are [La Doria Group](#), [HAK](#) and [Bonduelle](#). Others include [Greenyard Group](#), [Gecom Export Srl](#), [Conserve Italia](#), [Riberebro](#), [Napolina](#), [Pancrazio](#), [La BIO IDEA](#), [G'woon](#), [Amaizin](#), [Cassegrain](#), [Raynal et Roquelaure](#), [D'Aucy](#) and [Reflets De France](#).

[La Doria](#) dominates the canned food industry in Italy, especially in tomato-based products, pasta sauces, preserved beans and other vegetables. It is a key supplier to mass-market stores in various overseas and global markets including the United Kingdom, Australia and Japan. Private label items account for around **95%** of La Doria's revenues, through established ties with various stores globally.

[HAK](#) is a branded business operating in the plant-based food industry throughout northwest Europe. It markets foods for use as meals or meal components, including a variety of vegetables and beans packaged in jars and stand-up pouches.

[Bonduelle](#) dominates the global market for ready-to-eat vegetables, retailing under the brands Bonduelle, Cassegrain, Globus, Del Monte, Ready Pac Foods and Arctic Gardens.

### Developing country competitors

Kenya's [Njoro Canning Factory](#) is an industry leader in the manufacture of a wide variety of high-quality foods and meal components, including canned, frozen and dried fruits and vegetables, herbs and spices, tomato paste, jams and marmalades, sauces, pickles and relishes, bakery ingredients, and drinks. The brand has become well known and is recognised for great taste, convenience and value for money. Thanks to skilled import, export and supply specialists, they supply canned green beans in a variety of product ranges. Other Kenyan canned bean companies include [Trufoods](#) and [Peptang](#).

Though headquartered in France, [Nodé Négoce](#) operates throughout West Africa and Madagascar. Specialised in buying and reselling various food products, the company offers canned vegetables and tomato concentrates under the brands MaVie, Lalla, Adoua and Etalon. Other canned beans companies in Madagascar include [Codal Madagascar](#).

### Leading canned bean companies in other supplying countries

- China: [Acroyali](#), [Polofood](#), [Kunyu](#), [Sichuan Meining](#)
- Lebanon: [Al Wadi](#), [Alfa Interfood](#), [SLPAA](#), [Cortas Food](#)
- Hungary: [Észak Üvért](#), [Foltin Globe](#), [EKO Konzervipari](#)
- Poland: [Gaston Group](#), [Dawtona](#), [Rolnik](#), [Pudliszki](#)
- Turkey: [Korhan Pazarlama Diş Ticaret](#), [Tamtad](#)

#### Tips:

Be prepared for strong competition in the European canned bean market. You can learn from developing country exporters that have found ways to enter the European market, such as from Kenya, Madagascar, Lebanon and Mexico.

You can find information about bean production and processing by developing country suppliers on the websites of the [Pan African Bean Research Alliance](#) and [Uludağ Fruit and Vegetable Products Exporters' Association](#).

## Which products are you competing with?

Your main competition is with the categories of dried, frozen and fresh beans. European consumers have access to many varieties of dried beans and can purchase them in most retail chains and ethnic stores. Dried beans contain less sodium than canned beans. They cost less than canned beans, but are also less convenient as they require soaking and boiling, adding to meal preparation time.

Another competitor is frozen beans, which are a relatively new trend from the past 5 to 10 years. Frozen beans offer convenience comparable to canned beans. Canned beans can be stored at room temperature, while frozen beans must be stored in the freezer. Once canned beans have been opened, they have to be used within a few days or will go bad. By contrast, frozen beans allow for use of smaller portion sizes, as the remaining beans can be kept in the freezer for later use. A drawback of frozen beans is that the product range is very limited in Europe. Green beans and soy beans are the main frozen bean products currently available. The range of fresh beans is also limited in the European market. Green beans and broad beans are the main bean varieties available fresh. They are quick to prepare but do not have the shelf life of canned beans.

### Tips:

Read the CBI [dried beans](#) and [frozen beans and vegetables](#) studies to learn more about these industries and promotional tools used by suppliers.

Join with your industry partners to promote canned bean and pulse consumption. Examples of such alliances include the [Global Pulse Confederation](#), [TRUE Project](#) and [Canned Food Alliance](#).

## 4. What are the prices of canned beans?

European retail prices of canned beans vary greatly depending on the production country, can type and size, bean variety and quality, and vendor. Compared to other products in the processed fruit and vegetable market, the packaging of canned foods makes them better suited to selling in retail facilities, which can speed entry into the retail segment.

Pre-cooking increases bean weight by around 2.5 times, which helps offset the costs of processing and canning beans. Private label prices tend to be lower than those of manufacturer brands.

Canned beans usually retail at [€1.5/kg to €5.6/kg](#). This price indication is not very useful to suppliers as final prices diverge widely from export prices. This is due to the addition of other expenses such as for transportation, packaging, sales and profit margins. Below is an approximate price breakdown for canned beans.

Table 1: Price breakdown for canned beans (for average 400 g package)

Steps in export process	Type of price	Average share of retail price
Processing and canning	Producer	30-40%

Handling and export packing	FOB or FCA	42-45%
Shipment	CIF	47-48%
Import, handling	Wholesale	50-60%
Retail packing, handling and selling (value added tax included)	Retail	100%

Source: [CBI - Exporting canned beans and pulses to Europe](#)

The export price of canned beans depends on the quality, variety and country of origin.

Margins and prices in the value chain depend on several factors, including:

- Origin (production country);
- Quality (varies from season to season and country to country);
- Global demand versus global supply;
- Type of product and retailer pricing strategy. Retailers prefer to keep end-consumer prices stable for some canned fruit and vegetable products even if import prices fluctuate.

### Tip:

The best way to understand pricing is to compare your offer with that of your largest competitors. Since price levels change over time and can vary across different stores, channels and countries, continue to monitor all of these factors.

This study was carried out on behalf of CBI by [M-Brain](#).

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