

The European market potential for coconut water

Last updated:
06 August 2025

In the long term, the European market for coconut water is expected to show stable growth. This growth is likely to be driven by changes in the consumption patterns of European consumers. This especially relates to the popularity of functional and plant-based drinks. Also, beverage industry users are coming up with new/innovative and healthier solutions with coconut water as one of the main ingredients. The United Kingdom, France, Spain, Germany, Italy and the Netherlands offer opportunities for developing country suppliers.

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1. Product description: coconut water

Coconut water is the juice found in the centre of coconuts, which are the fruits of the coconut palm (*Cocos nucifera*). Coconut water is officially recognised as a juice, according to the [European Fruit Juice Directive](#) from 2024. Coconut water should not be confused with coconut milk or coconut cream, which are made from the grated fresh kernel.

Although coconut water can be consumed directly from young green coconuts without any further processing, this kind of consumption remains insignificant in Europe, despite increasing imports of young, chilled coconuts. Most coconut water on the European market is processed and packed. On the contrary, consumption from young coconuts makes up the largest consumption share in the coconut growing countries.

Young coconuts, 6-9 months old, offer the highest quantity of water. In spite of this, processed coconut water intended for export is mostly obtained from the water (liquid endosperm) of more mature coconuts of 10-13 months old. Coconut water from matured coconuts often comes as a side product with the production of coconut milk, desiccated coconut and virgin coconut oil.

The meat/kernel from young coconuts has very limited processing applications, but the meat/kernel from matured coconuts can be used to produce various high-value coconut products. This means that coconut water can be used for additional income through integrated processing. The main income still comes from processing the coconut meat/kernel. However, in some countries (like Brazil and Thailand), a trend towards increasing production and export of coconut water from young coconuts can be observed.

Coconut water is mostly exported in a pasteurised or sterilised form. It is mainly traded in the following forms:

- Single-strength or not-from-concentrate (NFC) coconut water – this type of coconut water is obtained from green or mature coconuts. It represents the largest share of coconut water volumes imported into Europe.

Although young coconuts (6 months old) can yield up to 1 litre of water, most quantities imported to Europe come from mature coconuts (10-13 months old), where approximately 150 ml is collected per nut. The minimum Brix content (sugar content of a water solution) of NFC coconut water should be ≥ 4.5 . It is packed in aseptic retail or bulk packaging such as bags in drums;

- Concentrated coconut water – this type of coconut water is usually produced by [vacuum evaporation](#) and mostly concentrated to 60 degrees Brix, but it can be concentrated to lower Brix values too. In this way, transport costs for water and packaging can be saved. After import, the concentrated product is reconstituted with water and often used as a mixing ingredient in sports drinks;
- Frozen coconut water – this type of product is used in the same way as single-strength or concentrated coconut water, but it is frozen in order to prolong shelf life and slow down chemical and microbiological changes. When producers use lower-grade pasteurisation equipment, coconut water can be frozen and sterilised after import;
- Fresh coconuts – in producing countries, coconut water is commonly consumed directly from the fresh nuts. The green outer shell is often trimmed down to decrease weight and transport costs. The short shelf life of young coconuts makes them unsuitable for slow sea transport. Transporting coconuts by air significantly increases the price of the product. Because of that, sales of young coconuts in Europe are low. To prolong shelf life, some companies use plastic wrapping or wax coating.

To avoid microbiological contamination, it is of the utmost importance to pasteurise/sterilise coconut water as soon as possible after collection. The most recommended technology is currently [ultrahigh-temperature processing \(UHT\)](#), which minimally deteriorates the quality and taste of coconut water. Emerging technologies such as [high-pressure pulsed electric field processing](#) or [ohmic heating](#) should still be investigated. Microfiltration can also be used instead of thermal pasteurisation to prevent changes in the taste of coconut water, but it requires a chilled supply chain.

The name ‘coconut water’ is reserved for 100% coconut water. If sugar, acid or sweeteners are added to fruit juice which is diluted with water, the product must be called nectar, soft drink or fruit drink.

Coconut water is not officially defined in the [international harmonised statistical system](#). The European [TARIC](#) database defines coconut water under the code 2009 8999 96. However, this code is used only to determine the applied tariffs for imports. For international statistics, coconut water is classified under [combined nomenclature](#) code 20098999, which commonly includes many other products. Therefore, it is not possible to present exact international trade data, only estimations based on industry inputs.

This study covers general information on the coconut water market in Europe that is of interest to producers in developing countries. When the study refers to ‘Europe’, it includes the 27 member states of the European Union, plus the United Kingdom, Switzerland, Norway, Iceland and Liechtenstein. Developing countries are defined as the countries that are listed as [official development assistance recipients](#).

To find out more about other coconut products, read our studies on [desiccated coconuts in Europe](#), [coconut milk](#), and [coconut oil](#). These products have sales potential on the European market, but in much smaller quantities.

2. What makes Europe an interesting market for coconut water?

Consumption of coconut water in Europe is still relatively low compared to Asia and South America. However, the European market is growing at a fast rate, driven by health-conscious consumers. Coconut water is becoming popular as a drink used for rehydration, but also as an ingredient in low-calorie beverages and sports drinks. Leading beverage companies are further boosting demand by creating innovative products based on coconut water. Over the last five years, coconut water was the only type of juice with double-digit market growth in Europe.

Coconut water is perceived to be a healthy drink, fulfilling expectations of modern European consumers. It contains less natural sugar and therefore has a lower energy value compared to other types of juice. Coconut,

rich in potassium, is also considered to be an isotonic drink, meaning that it contains naturally occurring electrolytes that help rehydration, especially after sweating during exercise. As such, it is considered a more natural solution compared to artificially produced isotonic drinks.

Due to its low energy value, coconut water is increasingly used as an ingredient in juice-based beverages, because it improves the nutritional profile of the final product. Based on '[Nutri-Score](#)' labelling, the majority of fruit juices sold in Europe are labelled with the 'C' score, meaning they have an average nutritional value. However, when coconut water is mixed with juices, the nutritional value of the drink is improved and reaches 'B' score. Because of that, European beverage companies increasingly use coconut water for healthy drink mixtures.

There are no precise statistical data on the physical consumption of coconut water in Europe, as several different sources report different consumption statistics. However, all industry sources agree that consumption of coconut water has increased over the last several years. Over the last five years, consumption of coconut water in Europe increased by an average annual rate of 15-20%. It is likely that European consumption will continue to increase in the next five years too, but at a somewhat lower rate of around 10% annually.

3. Which European countries offer the most opportunities for coconut water?

Current global consumption of coconut water is estimated to be over 700 million litres annually. Estimations are based on coconut water retail sales. Actual world consumption is much higher, as estimations by analysts do not include direct consumption from young coconuts, which is significant in coconut production countries. European consumption is estimated to be roughly 10% of world sales. This means European consumers and the beverage industry currently use around 65 million litres per year.

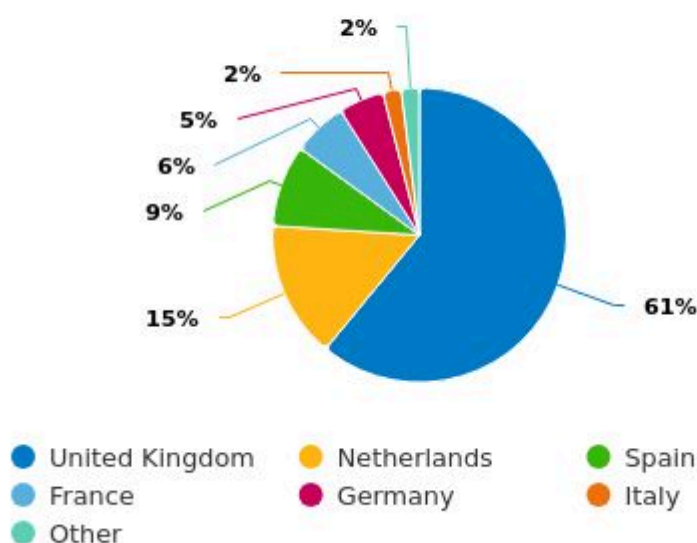
Physical import of coconut water in Europe is smaller compared to the consumed quantity. This is explained by the fact that some quantities are imported as concentrated coconut water, which is further reconstituted with water or used as an ingredient by the European beverage companies. However, import of pre-packed coconut water is increasing, as many companies have started to directly pack NFC coconut water in producing countries.

According to sources from major producing countries and the author's estimation, European imports are estimated to be over 50 million litres per year. Of this quantity, around 95% is imported as single-strength coconut water and 5% as concentrated coconut water. It is also estimated that less than 5% of imported single-strength coconut water is produced from young coconuts.

As Europe's main consumer of coconut water, the United Kingdom is an interesting focus market. Other large consuming countries include Spain, France, Germany and Italy. The Netherlands, as a trade hub and the second-largest importer in Europe after the UK, offers good opportunities for trade. Most of the quantities imported by the Netherlands are re-exported to other European destinations. Due to the popularity of healthy natural beverages, Scandinavian countries also offer good opportunities, especially Sweden and Norway.

Figure 1: European imports of coconut water by country, share of imported quantity, 2024

in %



Source: Autentika Global

The United Kingdom: Largest European coconut water market

The UK is the largest importer and consumer of coconut water in Europe. Coconut water consumption in the UK seems to still be on the increase, reaching over 33 million litres in 2024. This consumption estimate also includes coconut water used as an ingredient in beverages. Imports in 2024 were estimated at around 30 million litres. Most of the imported quantities were single-strength coconut water. Only around 1% of imports were concentrated coconut water.

The leading supplier of coconut water in the UK is the Philippines, with an estimated 90% share, followed by Thailand with a 7% share.

The British market is the largest in Europe, yet remains a challenging one. This is due to the very large share of the Vita Coco brand (owned by All Market Inc.). According to several sources, [Vita Coco](#) has more than a 70% share of the UK market. Vita Coco is based in the USA, where it holds nearly 50% of the coconut water market, but its success is even greater in the UK. When Vita Coco started to develop sales in Europe, its marketing activities were first focused on the United Kingdom.

Vita Coco coconut water products are packed through subcontracting in several origins such as Brazil, the Philippines, Indonesia and Sri Lanka. However, its strategic supplier is Filipino coconut processor [Century Pacific Agricultural Ventures](#) (CPAVI). In March 2024, the two companies entered into a long-term contract. This agreement includes the supply of approximately 90 million litres of coconut water over the next five years and involves a capital expenditure of around \$40 million by CNPF to expand its production capacity.

Other coconut water brands in the UK are [Innocent](#) by Coca-Cola, [Naked](#) (by PepsiCo), [Grace](#) (by Grace Foods), [Tropical Sun](#) (by Specialist Foods), [Chi](#) (by Chi Ventures) and [Coco Fina](#). Some packed coconut water is sold under the brands of exporting companies. Examples include brands packed by companies from Thailand, such as [UFC](#) (by Universal Food) and [Wonderfarm](#) (by Interfood Shareholding Company). The share of private labels (retail chain brands) is not high.

Imported concentrated coconut water is not often used for packing of retail products, but more as an ingredient

for soft drinks and other beverages. Among the main users of this ingredient is the Prime range of sports and energy drinks, where coconut water accounts for 10% of the ingredients. Bulk importers include ingredient traders and processors like [Kiril Mischeff](#), [Döhler UK](#) and [First Grade International](#).

The United Kingdom market offers specific opportunities for suppliers of Fairtrade-certified products, as it is the largest Fairtrade products market in Europe. Currently, there are around 5,000 Fairtrade-certified products on sale in the United Kingdom. Another opportunity lies in the usage of coconut water as the main ingredient of some functional drinks.

Figure 2: Vita Coco brand



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Figure 3: Innocent brand



Source: [kiliweb](#) per Open Food Facts, under the [Creative Commons Attribution-Share Alike 3.0 Unported](#) license

Spain: The Thai connection

In 2024, Spanish imports of coconut water from coconut-producing countries were estimated at around 5 million litres. In addition, an additional 4 million litres are imported from trading and bottling companies in Europe, making for a total consumption of around 9 million litres. Thailand is the leading supplier of coconut water to Spain. It supplies over 85% of total imports from coconut-producing countries. Other important suppliers are the Philippines, Sri Lanka and Vietnam.

The popularity of coconut water consumption is recognised by the Spanish retailer Mercadona, which created its own coconut brand in cooperation with the Thai company Theppadungporn Coconut (bottler of brand [Chaokoh](#)). The Mercadona private label is the leading coconut water brand in Spain.

Significant volumes of coconut water are packed in Thailand and imported in retail packaging to Spain. Sometimes Thai companies also pack coconut water imported from other Southeast Asian origins. An example of this type of subcontracted operations is the Elements brand. It is imported by [La Perla](#) but packed in Thailand with coconut water imported from Vietnam. Other Spanish coconut water brands include [Goya](#) (by Productos Goya Nativo), Vita Coco, [Eco Cesta](#) (by Biogran) and [Tesoro Natural](#) (by Merica Foods).

Coconut water is also used as a main component in innovative, functional and sports drinks. [Zü Premium coconut water](#) is an example of an innovative drink. The product includes added collagen and was created by the Spain-based [AMC Group](#).

Spanish companies were some of the first in Europe to introduce young coconuts in Europe as the best way to consume coconut water. The Spanish company World's Coconut Trading introduced easy-to-open [Genuine Coconuts](#) and won the innovation award at Fruit Logistica in 2016. Since then, the company has introduced this product to several retailers in Europe. Another example of young coconut trade is the specialised coconut

trading company Yanog Barcelona, which created a brand of fresh coconuts, [Coco Wilson](#). Aside from young coconuts, Coco Wilson sells fresh coconut pulp, concentrated coconut water and packed retail water.

Figure 4: Genuine Coconut brand



Source: [thaiagata](#) per Open Food Facts, under the [Creative Commons Attribution-Share Alike 3.0 Unported](#) license

France: Increasing import from Thailand and Sri Lanka

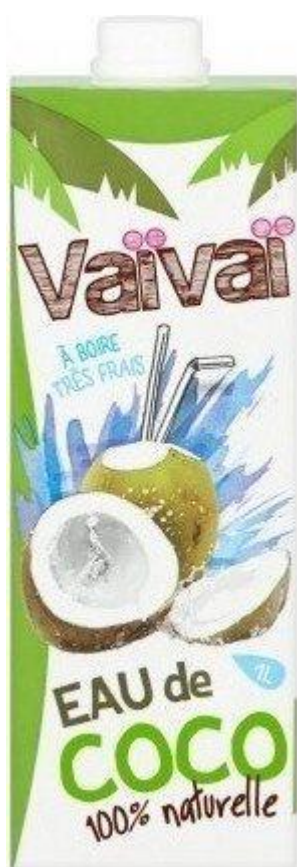
Imports of coconut water from coconut-producing countries to France in 2024 are estimated at around 3 million litres. In addition, 5 million litres are imported from European traders, especially the Netherlands and Germany. This means an estimated 8 million litres of coconut water were consumed in France in 2024.

Over the last 5 years, there has been a significant shift in leading suppliers. Since 2020, French imports of coconut water from the Philippines have been decreasing. At the same time, Sri Lanka and Thailand are gaining market share. In 2024, around 40% of coconut water imported from coconut-processing countries originated in Thailand, followed by the Philippines (30%), Sri Lanka (25%) and other origins like Vietnam and Brazil.

Currently, the leading brand in France is Vita Coco, followed by [Vaivai](#). Vita Coco is distributed in France by the Belgian distribution company [Chef Sam](#), while Vaivai is distributed by [Solinest](#). Other coconut brands in France include [Innocent](#) (by Coca-Cola), [Chi](#) (by Chi Ventures) and [Force Bio](#). Coconut water is also sold under private labels (retail chain brands), such as [Carrefour](#) (Carrefour Bio label), [Super U](#) (U Bio label) and [Intermarché](#) (Jafaden label).

Confronted with the decrease in juice consumption, some French juice and soft drinks processors started innovating and offering low-calorie solutions to French consumers. Fruit juice brand Joker (by Eckes Granini) introduced a line of new fruit juices containing **30% less natural sugar from fruit**. The major ingredient used to decrease the sugar content is coconut water. By mixing fruit juice with coconut water, the nutritional labelling (through the **Nutri-Score** system) improved from rank 'C' to rank 'B'.

Figure 5: Vaivai coconut water brand



Source: [kiliweb](#) per Open Food Facts, under the [Creative Commons Attribution-Share Alike 3.0 Unported](#) license

Germany: Leader in organic coconut water with a variety of opportunities

Germany was the first country to introduce coconut water on the market, as early as 2002. This was done by the company Green Coco. However, the market did not develop as fast as in the United Kingdom. In 2024, German imports from coconut water-producing countries accounted for around 3 million litres, with additional imports of 2 million litres through re-export, mostly from the Netherlands. It is therefore estimated that Germany consumed around 5 million litres of coconut water in 2024.

In direct imports from coconut-producing countries, Germany imports around 70% of its coconut water from Sri Lanka, 20% from Thailand, 3% from the Philippines, 2% from Brazil and 5% from other origins. Most of the coconut water imported to Germany from Sri Lanka is organic.

Germany has a few distinctive market characteristics related to coconut water consumption that provide opportunities for developing market suppliers:

1. The market is not dominated by the Vita Coco brand;
2. Most importers count on a large number of reliable suppliers instead of leading industrial processors from the Philippines;
3. Sri Lanka is the leading supplier, showing willingness to import from relatively smaller companies rather than large Philippine suppliers;
4. Most of the coconut water consumed is organic.

Green Coco Europe is the leading coconut water supplier in Germany, with the Dr. Antonio Martins brand. The company bottles coconut water in Germany and packs private labels for retail chains. It also sells bulk coconut water to the beverage industry in Europe. Aside from German sales, it is one of the leading suppliers of coconut water in several other central and northern European markets. Other German coconut water brands (many of them organic) are Solevita (private label by Lidl), **Morgenland** (by EgeSun), **Kulau**, **Bio Company**, **Dr. Goerg** and **Mal**.

Germany is a particularly attractive market for organic coconut water, as the country is the **largest European market for organic food**. Specialised organic retail chains sell their own brands of organic coconut water, like **Alnatura** and **DM**. Examples of organic labels of mainstream supermarkets include REWE (**REWE Bio** label) and EDEKA (**EDEKA Bio** label). New suppliers should be aware that Germany is a very price-competitive market, and many organic brands do not have significantly higher prices compared to conventional coconut water brands.

Some of the large German beverage companies, such as **Döhler**, **Carrière** and **Eckes Granini**, also trade coconut water or use it in their product and ingredient formulations.

Figure 6: Dr. Antonio Martins coconut water brand



Source: Dr. Antonio Martins

Italy: Variety of coconut water products

Direct Italian import of coconut water from coconut-processing countries is estimated to be more than 1 million litres in 2024. Still, three times as much coconut water is imported from other European countries, either as re-export or by bottling companies. Italian consumption of coconut water is estimated to be around 4 million litres. Among coconut-producing countries, Thailand is the leading supplier to Italy with more than 80% market share, followed by Sri Lanka (5%), Brazil (5%) and the Philippines (4%).

The Italian market is very dynamic, with new product developments and the presence of a wide variety of domestic and foreign brands. The leading brand in Italy is [Ococo](#), offering organic and Fairtrade coconut water. Other brands in Italy include [Santal](#) (by Lactalis) and [Yoga Tasky](#) (by Conserve Italia). Distribution company Union Trade supplies the market with the [Foco](#) and [Grace](#) brands. [Green Coco Europe](#) (Germany) and [Pfanner](#) (Austria) are also present on the Italian market.

Offering organic-certified coconut water to Italy provides opportunities for emerging suppliers, as significant quantities of coconut water in Italy are sold as organic. The leading company selling organic plant-based drinks in Italy is [Isola Bio](#), which also provides a range of different coconut water drinks. Other organic coconut water brands in Italy include [Ococo](#) (by Mew) and [Probios](#).

Coconut water is also used in coconut-flavoured drinks by Italian beverage producers such as [VitaSnella](#) (bottled by Ferrarelle), [Cocco Esotico](#) (by Zuegg), and [Derby Blue](#) (by Conserve Italia), as well as in several plant-based drinks by Isola Bio.

The Netherlands: The European trade hub

The Netherlands does not consume a lot of coconut water, but it imports and trades large quantities. Thanks to the network of trade connections established across Europe, the country can provide interesting opportunities for emerging suppliers. The Netherlands also provides logistical solutions for the beverage industry, including coconut water processing and defrosting, with specialised companies like [Lineage](#).

The Netherlands is Europe's second-largest importer of coconut water from coconut-processing countries. It imports about 15% of all coconut water imported to Europe. Most of the Dutch coconut water imports originate in the Philippines (around 40%), followed by Sri Lanka (30%), Thailand (20%), Brazil (3%) and Indonesia (2%). The Netherlands is the only European country that imports coconut water from Indonesia. The main reason for low imports from Indonesia to Europe is an import duty of 14.1%.

Although the import of coconut water to the Netherlands is estimated to be over 7 million litres, most of it is re-exported, leaving around 1 million litres for domestic consumption. Some Dutch companies offer bottling and blending services for large European retail chains. The leading provider of those services is Netherlands-based [Refresco](#), which has bottling operations in several countries.

Consumption of coconut water in the Netherlands is increasing fast, and many new brands are appearing on the market. But the private label of the leading retail chain, Albert Heijn (AH Kokoswater), tops domestic sales. Aside from international brands such as Vita Coco and Innocent, a notable coconut water brand is [Healthy People](#), acquired in 2020 by [Riedel](#), the juice blending and bottling company. Other coconut water brands on the market include [Grace](#) (by Grace Foods), [Mogu Mogu](#), [I Am Super Juice](#) and [Biologisch Kokoswater](#) (by Witsenburg Natural Products).

Coconut water is also traded from the Netherlands by specialised juice ingredient suppliers such as [Prodalim](#) (with processing facilities in Brazil, Vietnam, Mexico and Poland) and Santos Enterprise Food.

Tips:

Stay informed about developments on the market by visiting the [European Fruit Juice Association \(AIJN\) website](#);

Learn more about the fruit juices and soft drinks market in the United Kingdom by visiting the website of the [British Soft Drink Association](#).

4. Which trends offer opportunities or pose threats in the European coconut water market?

The increasing popularity of healthy functional drinks, a desired decrease of sugar and energy intake and new flavour launches are the leading drivers behind the growing interest in coconut water in Europe.

To find out more about general trends, read our study about [trends in the European processed fruit and vegetables market](#).

Popularity of natural hydration drinks

Due to a higher content of minerals such as potassium, and the presence of carbohydrates, coconut water can be classified in the group of isotonic drinks. Isotonic drinks have quantities of minerals and carbohydrates similar to those in the human body. This helps them get absorbed more quickly than water. Sports drinks (isotonic, hypotonic and hypertonic) are regularly used after exercising to replace fluids lost through sweating.

The advantage of coconut water is that it is a completely natural drink, while most other sports drinks are artificially created. Strictly speaking, not every coconut water is classified as an isotonic drink according to the [official scientific opinion](#) of the European Union. However, there is promising clinical research on coconut water indicating it has benefits as an [add-on therapy for ulcerative colitis](#).

According to several sources, the market for sports drinks in Europe is forecasted to [grow by an average yearly rate of 6%](#), and to reach US\$4.80 billion by 2033. Coconut water is marketed as a 'health booster' in many ways. Most often, it is marketed as a 'rehydrator' and 'anti-ageing' product that opens sports drinks, health and beauty channels for developing country suppliers. Other health claims include stressbuster, natural diuretic, digestive soother, detoxifier, stomach comforter and cholesterol-lowering product.

Coconut water does not have a flavour profile and sweetness like fruit juices. In order to make it more attractive to consumers, it is often mixed with small quantities of fruit juices or purees to create more fragrant coconut water drinks.

Coconut water reduces sugar in fruit juices

Sugar consumption in Europe has decreased in the last few years, as consumers choose healthier, low-sugar diets and food processors reformulate their products to lower sugar content. European consumers' concerns about sugar are negatively affecting the fruit juice and soft drinks industry. The European Soft Drink Association has influenced the soft drinks industry in Europe [to decrease sugar content by 10%](#) over the last five years. Juice producers have found a way to decrease calorie content by mixing juices with coconut water.

In terms of nutritional composition, coconut water can officially be labelled as 'low energy', because it contains 18 kcal per 100 ml. European Union legislation states that anything less than 20 kcal can claim to be [low energy](#). As most fruit juices contain more than 40 kcal, mixing with coconut water is a way to reduce calorie

intake.

Juice companies are experimenting with mixing juice with coconut water to reduce sugar levels in juices. There have been several product launches with fruit juices mixed with coconut water, but few were successful. A successful example mentioned previously is that of Eckes Granini, which introduced a line of fruit juices with coconut water containing [30% less natural sugar from fruit](#).

Demand for plant-based drinks

Plant-based diets are becoming increasingly popular in Europe. In order to support production and consumption of plant-based food, several European companies formed the [European Plant-based Food Association](#) (ENSA). Some replacements for dairy drinks that are most often used are cereal, nut and coconut-based drinks. These drinks often have a higher sugar content than dairy options, so ENSA members are committed to reducing the sugar content of their plant-based drinks. Similar to the fruit juice industry, they do this by adding coconut water.

Coconut water is also increasingly used as an ingredient in plant-based drinks, not only because of the reduction of sugar intake, but also because it improves the overall nutritional value of the final product. Coconut water also enhances the flavour profile of plant-based drinks. For coconut-based drinks, the ingredient used most is coconut milk, but coconut water is increasingly used in 'no-added-sugar' products to provide the necessary sweetness. Several plant-based drink manufacturers use coconut water in their products, such as [Alpro](#) and [Isola Bio](#).

Tips:

Read our study on the [demand for processed fruit and vegetables on the European market](#) to learn more about general trade trends and sizes of specific market segments;

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

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

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