# The European market potential for canned fruits and vegetables

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In the long term, the European market for canned fruits and vegetables is expected to grow around 1-2% per year. This growth remains limited, as there is a tendency for fresher products, and if not fresh, frozen products. A major trend in the market is the growing preference for canned fruits soaked in their own natural fruit juices instead of sugar syrup. Germany, the United Kingdom, France and the Netherlands offer opportunities for exporters from developing countries.

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## 1. Product description

Canned fruits and vegetables are products defined by the following criteria:

- Prepared from substantially sound, fresh or frozen fruits and vegetables. They can undergo operations such as washing, peeling, grading, cutting and so on, depending on the type of product;
- Packed with a suitable liquid packing medium. The packing medium can be different depending on the type of product (for example, dilution of sugar or other sweeteners, aromatic plants, spices, vinegar, fruit juices or nectars, oil and tomato purée);
- Packed with packing media (the liquid) that do not exceed 20% of the product's net weight;
- Processed using heat (pasteurised or sterilised) to prevent spoilage and to ensure a long shelf life of the product.

This study covers general information regarding the market for canned fruits and vegetables in Europe which is of interest to producers in developing countries. Please see Table 1 for the products and their product codes.

Table 1: Products in the product group of Canned Fruits and Vegetables

| Combined Nomenclature Number | Product |
|---|---|
| 200190 (and corresponding 10 digit codes) | Fruit and vegetables, corn, mushrooms preserved by vinegar or acetic acid |

| | |
|---|---|
| 2008 (and corresponding 8 and 10 digit codes) | Prepared or preserved pineapples, citrus fruit, pears, apricots, cherries, peaches, strawberries, palm hearts, cranberries, mixtures and other fruit |
| 2002 (and corresponding 6 digit codes) | Prepared or preserved tomatoes |
| 2003 (and corresponding 6 digit codes) | Mushrooms prepared or preserved otherwise than by vinegar or acetic acid |
| 2005 (and corresponding 6 digit codes) | Fruit and vegetables prepared or preserved otherwise than by vinegar or acetic acid |

Picture 1: Retail packaging of canned pears

Source: Wikimedia

Picture 2: Retail packaging of canned vegetables

Source: Flickr

## 2. What makes Europe an interesting market for canned fruits and vegetables?

Europe is by far the largest importing region of canned fruits and vegetables, accounting for a share of over 70% of the world's total imports. European imports of canned fruits and vegetables have increased in value by 2.4% on average per year over the period 2015-2019 (the volume showed a similar growth). Almost 90% of imports from outside Europe come from developing countries.

In the next five years, the European market for canned fruits and vegetables is likely to increase with an annual growth rate of 1-2%. The main reasons for the expected market growth are innovations that lead to improvement of canning technology. Increased expenditure in research and development relates to healthier food launches, better 'Nutri-score' labelling and more variety of convenience (ready-to-eat foods). Also, the expanding distribution network for canned food items in Europe will contribute to market growth. Think of online and offline shops dedicated to niche or specialty food markets, such as Asian stores, Halal stores, vegan stores, organic stores, etc. The long shelf life of canned fruits and vegetables remains an important factor supporting the canned fruits & vegetables market.

As Figure 1 reveals, internal European trade accounts for almost 75% of all imports of canned fruits and vegetables and predominantly involves the supply of canned tomatoes from Italy in the first place, but also canned products from other important European suppliers such as Spain, Germany, the Netherlands, France and China.

Regular fluctuations in imports for certain canned products are caused by the size of the harvested raw materials rather than by structural changes in the market. This means tight competition for new developing country suppliers if they are focused on the most traded goods such as canned tomatoes and canned mushrooms.

### Tips:

- Check the website of PROFEL, the European Association of Fruit and Vegetable Processing Industries, for information about ongoing issues on the European market for processed fruit and vegetables. The website provides links to the websites of the national member associations.
- You can find opportunities for export in cooperating with the European canneries. The largest producing companies often complement their offer with imported canned fruits and vegetables. They are therefore potential customers. An example is the increasing import of tomato products to Italian canneries from Egypt.

## 3. Which European countries offer most opportunities for canned fruits and vegetables?

As Europe’s largest food market, Germany is an interesting focus market. Germany also provides specific opportunities for organically certified canned fruits and vegetables, as it is the leading organic market in Europe. The United Kingdom and France are in second and third position, since these countries have relatively lower production output than Spain and Italy. The Netherlands and Belgium are smaller markets for canned fruits and vegetables but are in the top six because these countries also function as re-exporters for canned fruits and vegetables.

### Germany: an important ethnical canned food market for Turkish suppliers in the first place

Germany is by far Europe’s largest importer of canned fruits and vegetables. The German import value of canned fruits and vegetables was €2.1 billion in total in 2019, 20% of total EU imports. Imports varied from year to year and average growth was slightly positive at 0.8%.

The top three of products imported to Germany come from within Europe; in the first place are canned tomatoes (mostly from Italy), followed at a large distance by canned olives, canned mushrooms, canned green beans and canned sweet corn.

The top three of product flows imported from developing countries consists of:

1. Canned pickled vegetables, predominantly imported from Turkey, but also from India, South Africa, Peru, Mexico and Egypt.;
2. Canned olives, mostly from China and Turkey, followed by Peru and Morocco;
3. Canned pineapple, imported from Thailand, Indonesia, Kenya and the Philippines.

Canned pickled vegetables from Turkey find their way to the many ethnic retail outlets in Germany.

The German market is large but quite competitive. A considerable number of importers and traders import canned fruits and vegetables, but they are well aware of prices in the main supplying countries outside Europe, such as China and Turkey. German consumers are not very loyal to brands; instead, many prefer to buy the cheapest or best price/quality product. This is also reflected by the above-average number of discount retail formulas in Germany.

COVID-19 also meant a sharp rise in demand for canned fruits and vegetables in Germany. For the leading brand in German supermarkets, Bonduelle (from France), cans of gold corn, legumes and green vegetables were in especially high demand, particularly the 425-milliliter and 845-milliliter cans.

### Tip:

- As the German market for most common canned fruits and vegetables is rather saturated, exporters should offer unique products or concepts – for example, not only plain gherkins, but gherkins with e.g. mango, or other exotic combinations.

## France: the ultimate bean lovers

French imports of canned fruits and vegetables reach a firm second position in the European Union. With 1.4 million in 2019 (14% of European imports), the import value was only a bit ahead of the value of the United Kingdom's imports. On average, growth was positive at 1.3% per year.

The top three of products imported to France come from within Europe: in first place we find canned tomatoes, followed at a large distance by canned olives and mushrooms.

The top three of product flows imported from developing countries consists of:

1. Canned olives, imported mostly from Morocco, but also supplied by Peru and China;
2. Canned beans from Kenya (more than 50%), Madagascar and Cameroon. France is by far the largest destination of canned beans in Europe. Percentagewise, 65% of canned beans are imported by French companies. The difference with importers #2 and #3, the United Kingdom and the Netherlands, which both have a share between 10 and 12%, is considerable;
3. Canned tomatoes that mostly come from Ecuador, followed at quite some distance by Morocco. Guyana, Turkey and Peru supply small volumes as well.

French consumers mainly buy their canned fruits and vegetables in huge supermarkets (*hypermarché*). However, their share of the market (about one-third) has not grown in recent years, while discounters have only captured about 10% market share. The success of the so-called '*grand surface frais*' format in France is very interesting. These 'stores' only sell fresh produce and have emerged as strong competition to both hypermarkets and discount formulas.

While there are only a few formulas in the segment of huge supermarkets, and the largest one of them is Carrefour, the segment of organic retail is much more dynamic, with several formulas building the demand for organic products. Names of formulas are Biocoop, Naturalia, La Vie Claire, Les Comptoirs de la Bio, Bio C'Bon and NaturéO.

## The United Kingdom: large importer with best performance of developing countries

The United Kingdom (UK) imports considerably less than Germany, but the import value was enough to reach a third place in Europe in 2019 (with 13% of European imports). Imports of canned fruits and vegetables reached €1.3 billion in 2019, mainly as a result of a huge growth of 11% in 2019. Obviously, importers were preparing for a Brexit and therefore increasing their stock to maximum levels. On average, growth reached 0.6% per year. Of the six European countries under review, the UK was the market with the best performance for developing countries.

The top three of products imported to the UK come from within Europe. They are firstly canned tomatoes, followed at a large distance by canned beans, canned sweetcorn and canned pickled vegetables.

The top three of product flows imported from developing countries consists of:

1. Canned pineapple, in more or less equal values from Thailand, Kenya and the Philippines. Indonesia, Vietnam, Swaziland and China make up the balance;
2. Canned (unspecified, often mixed) vegetables, of which 60% come from Turkey, with further imports from India, Mexico and Peru. One of the popular items imported from Turkey is jarred roasted sweet peppers. Different types of mixed pickled mixes are also popular;
3. Canned citrus and mandarins that come mostly from Turkey and South Africa. Smaller volumes are imported from Swaziland, China and Peru.

British consumers typically buy more canned fruits and vegetables during the autumn and winter seasons. Especially the older generation relies on canned food products for at least three meals per week. The most popular product is canned baked beans, followed by canned tomatoes and canned sweetcorn. While the UK market is quite price-conscious, there is also a tendency to buy more healthy and organic products, which is also reflected by the presence of strong and growing organic retail formulas such as Planet Organic, Whole Foods and Sainsbury's (although the last one is not completely organic).

Leading brands of canned fruits and vegetables in the United Kingdom are Napolina (Italian canned tomatoes), Batchelors and Princes.

## Netherlands: important destination for pickled vegetables and canned mushrooms

The Netherlands is the largest importer of the remaining European countries. With an import value of €1.1 billion, the country ranks fourth and far behind France and the United Kingdom. Unlike the top three countries, Dutch imports experienced a considerable growth with 6.3% on average per year. This was mostly the result of strong growth (+12% and +8.3% respectively) in 2016 and 2019.

The top three of products imported to the Netherlands come from within Europe; in the first place are canned tomatoes, followed at a large distance by canned mushrooms and olives.

The top three of product flows imported from developing countries consists of:

1. Canned pickled vegetables, mostly from Turkey (70%). The rest comes from India and Peru. Although the Dutch import value is half of its neighbouring country Germany, the country takes a firm second place ahead of the United Kingdom and Spain;
2. Canned mushrooms, of which 65% come from Turkey and the rest from India. The Netherlands takes a strong second place in the list of canned mushrooms imports by European countries, after Germany. The country is an important producer of mushroom products, and as a result there is also a group of companies that acts as a global trader of mushrooms and mushroom products. This is also reflected by the fact that the #1 export product is canned mushrooms (€255 million in 2019);
3. Canned pineapple that comes mostly from Indonesia and Thailand (45% and 30% respectively), with lower volumes from Kenya, the Philippines and Costa Rica.

The Netherlands has developed into a major trade hub for different kinds of agricultural products. As a result, various types of fresh fruit are widely and relatively cheaply available in the Netherlands. These often substitute canned fruits in meals, as 'freshness' is appreciated. There is also a strong concentration in the food retail market, with Albert Heijn, Plus and Jumbo having relatively large market shares.

## Spain: strong supplies from China and Peru and #2 canned pineapple importer

Spain is an important exporter of canned fruits and vegetables within the European Union, but the country also depends on imports to a considerable extent. While Spanish imports grew considerably in 2016 and 2017, they went down by 3.6% and 3.3% in 2018 and 2019 respectively. On average, Spanish imports increased by 0.7%, and imports totalled €716 million in 2019.

The top three imports to Spain come from within Europe and are canned sweetcorn, canned strawberries and canned tomatoes, in that order.

The top three of product flows imported from developing countries consists of:

1. Canned olives, of which 90% come from China and Peru. Small volumes come from Egypt, Ethiopia and Morocco;
2. Canned asparagus, of which 95% comes from China and Peru. The rest is supplied by Ethiopia;
3. Canned pineapple that comes mostly from Indonesia (40-45%), with smaller and more or less equal volumes from the Philippines and Kenya. After Germany, Spain is the second-largest importer of canned pineapple, far ahead of the Netherlands and the United Kingdom.

### Belgium: relatively large importer of canned olives

Belgium imported €705 million of canned fruits and vegetables in 2019. Average growth was strong at 4.8% on average per year.

The top products imported to Belgium come from within Europe. They are, in the first place, canned mushrooms, then canned tomatoes and followed at a large distance by canned olives.

The top three of product flows imported from developing countries consists of:

1. Canned olives in more or less equal values from Turkey and Morocco. Belgium is the fourth-largest importer of canned olives. Spain and France are in first and second place, which is not surprising, as these countries have a large population and a Mediterranean cuisine in which olives are consumed a lot. Germany, as the largest market in Europe for canned fruits and vegetables, takes third place, and then comes Belgium;
2. Canned pineapples from Indonesia, Thailand, the Philippines and Kenya;
3. Canned tomatoes that come mostly from Turkey, with low volumes from Ecuador and Egypt.

**Tips:**

- See our study on Market Statistics & Outlook for Processed Fruit and Vegetables for more information about general trade developments within the European processed fruit and vegetables sector.
- Check trade statistics for products you are interested in with the tools of ITC TradeMap or Trade Helpdesk.

## 4. Which trends offer opportunities on the European canned fruits and vegetables market?

The growing demand for vegan and healthy food offers opportunities to exporters from developing countries. Also, consumers increasingly prefer convenience and easy-to-prepare food, and canned foods and vegetables offer such convenience.

To find out more about general trends, read our study about Trends on the European Processed Fruit and Vegetables Market.

### Veganism offers opportunities for protein-rich canned vegetables

Veganism has been a trend in Europe for the last few years. Reasons for a plant-based diet are ethical, ecological and health related. Vegans do not consume animal-based foods (eggs, milk, etc.), which means they consume plant-based foods like vegetables, mushrooms, seeds, grains and substitutes for meat. As vegans miss the animal proteins, they most likely will consume more vegetable proteins, such as soy products like edamame beans (one of the richest sources of protein in a plant-based diet), lentils and chickpeas.

Data from the United Kingdom provide an example of this fast growth, as a poll by the Vegan Society showed that the number of vegans in Britain has risen by more than 360% over the past decade, with over 500,000 people now adopting a vegan diet.

The European Vegetarian Union (EVU), as the umbrella organisation of vegan and vegetarian associations and societies throughout Europe, is the background organisation for the V-Label, a standardised voluntary European certification scheme with the aim of easy identification of vegetarian and vegan products and services.

Picture 3: The V-Label and an example of the V-label on a can of olives

## Consolidations are shaking up the industry

Mergers, acquisitions and centralisation of production are influencing the European canned fruits and vegetables industry. The decline in Europe's retail market for canned vegetables led to overcapacity, sparking a price war, especially among private label suppliers. European producers are therefore looking for ways to decrease the costs of production. Two examples are the merger of three companies into the Greenyard Foods Group, with the aim of centralising the global offering of the full range of fresh, frozen and canned products, and the acquisition of the Canadian canning and marketing activities of Delmonte by Bonduelle.

## Less added sugars

The term ‘free sugars’ refers to all monosaccharides and disaccharides added to foods by the manufacturer, cook or consumer, plus the sugars that are naturally present in honey, syrups and fruit juices. It does not include sugars present in whole fruits or vegetables. Today’s consumers are into low-sugar or sugar-free products. They are trying to reduce sugar consumption, as recommended by the World Health Organization, including in canned fruits, to which sugar-based syrup is often added. As an alternative, producers can pack the canned fruit into its own juice. Another frequently applied method is to use natural sweeteners (date syrup, honey) instead of sugar.

## Convenience remains an important aspect

Consumers increasingly choose products from the shelves that offer convenience. For canned products, this means that easy-to-open lids on cans are used more and more often in the trade of canned fruits and vegetables. Even though the prices of the exported products increase slightly, easy-to-open lids are requested by buyers. Comparable convenient types of packaging are smaller-sized cans and the stand-up pouch, which is also showing growing sales across Europe.

The increasing demand for flavour innovation and development of premixes for home cooking is also linked to convenience. Ready-mixes of frozen exotic fruit added with other ingredients fit in this trend.

## The search for nutrition-rich fruits and vegetables

’Superfruits’ have no official definition in the USA or Europe, but their advocates claim such fruits have superior health benefits, either because they are nutrient dense or because they contain antioxidants. As the general ’superfood’ trend grows, producers and retailers are introducing new superfruit and super vegetable products in the market, such as pomegranates, mangosteens, blueberries, blackcurrants and açaí berries. The consumption of superfruits and super vegetables is likely to increase, so the consumption of canned superfruits and super vegetables is likely to benefit from that trend as well. The only limitation here may be the fact that a premium positioning of superfruits does not perfectly match with the (mostly not premium) presentation in tins, but it does match with presentation in glass jars and stand-up pouches.

South America still produces the largest volume of superfruits. Think of açaí, acerola, camu camu and lucuma, amongst others. Many of these products come from Peru, and Peru is also a leader in terms of superfoods marketing. Asparagus is even promoted by the Peruvians as 'Super Asparagus', and three Peruvian companies (Viru, Green Peru and Danper) are exporting considerable volumes of canned asparagus to European markets. Their #1 market is Spain, followed at quite some distance by France and Germany.

Africa is mostly known for its two superfoods, dried baobab and moringa, while Asian producers will continue to have good opportunities in the European market with super tropical fruits including melons, cantaloupes, watermelons, mangoes, mangosteens, rambutans, jackfruits, pomelos, papayas, durians, grapefruits, pineapples and fruit mixes.

### Tips:

- Promote the nutritional properties of your canned vegetables, especially related to proteins, fibres and vitamins. However, avoid health or nutritional claims that are not substantiated by scientific evidence.
- Read the CBI Trends in Processed Fruit & Vegetables study to learn more about the general market trends and developments which are shaping European processed fruit and vegetables markets.
- Check the websites of European trade shows and exhibitions to discover the newest trends. The most important trade fairs in Europe relevant to frozen vegetables are SIAL (France, every even year in October), Anuga (Germany, every odd year in October) and BioFach (Germany, organic products, every year in February).