



CBI Product Factsheet: Frozen Berries in France

'Practical market insights for your product'

France is the second largest importer of frozen berries in Europe with the majority of imports stemming from Serbia. These frozen berries are mainly intended for domestic consumption, which is still increasing despite the economic crisis. This product factsheet provides information on product specifications, statistics, trends, market channels and segments, and competitiveness of frozen berries in the French market.

Product description

Product definition

Freezing is a method of long-term preservation for fruits and vegetables. Berries are very well suited to freezing. In this product factsheet the focus will be on frozen berries. They are defined as products prepared from fresh, clean, sound, ripe berries of firm texture according to the characteristics of the various species. Species that can be distinguished are: *raspberries, blackberries, mulberries, loganberries, black, white or red currants, gooseberries*. This product factsheet covers general information regarding frozen berries in France which is of interest to producers in developing countries¹. See Table 1 below for the corresponding product codes for frozen berries.

Table1: CN (Combined Nomenclature) codes for frozen berries

Number	Product
08112011	Raspberries, blackberries, mulberries, loganberries, black, white or red currants and gooseberries, uncooked or cooked by steaming or boiling in water, sweetened, with sugar content of > 13 %, frozen
08112019	Raspberries, blackberries, mulberries, loganberries, black, white or red currants and gooseberries, uncooked or cooked by steaming or boiling in water, sweetened, with sugar content of =< 13 %, frozen
08112031	Raspberries, uncooked or cooked by steaming or boiling in water, frozen, unsweetened
08112039	Black currants, uncooked or cooked by steaming or boiling in water, frozen, unsweetened
08112051	Red currants, uncooked or cooked by steaming or boiling in water, frozen, unsweetened
08112059	Blackberries and mulberries, uncooked or cooked by steaming or boiling in water, frozen, unsweetened
08112090	Loganberries, white currants and gooseberries, uncooked or cooked by steaming or boiling in water, frozen, unsweetened

¹ Developing countries are defined in this Product Factsheet as the countries mentioned on the OECD DAC list dated August 2009. For the list, see the OECD website: <http://www.oecd.org/investment/stats/43540882.pdf>

Product specification

Quality

Berries are known to freeze well and retain their integrity and shape, although differences can be found among different varieties. Frozen berries can be presented as free-flowing (i.e. as individual berries not adhering to one another) or non free-flowing (i.e. as a solid block). Optional ingredients that can be added are sugars or other (artificial) sweeteners such as saccharin, aspartame or sucralose. As such, frozen berries can be prepared with either dry sugars or syrup.



Source: www.freedigitalphotos.net.

More specifically, according to the [Codex Alimentarius](#) ('Food code' of WHO and FAO), quick frozen raspberries have to be:

- of good, reasonably uniform colour, characteristic of the variety;
- clean, sound and practically free from foreign matter;
- free from foreign flavour and odour;

and with respect to visual or other tolerable defects should be:

- practically free from sand and grit;
- when presented as free-flowing, berries should be practically free from adhering to one another and should be easily separated when in the frozen state;
- reasonably free from uncoloured berries;
- practically free from completely uncoloured berries;
- reasonably free from stalks (cap stems);
- practically free from extraneous vegetable matter;
- reasonably free from damage or blemish due to pathological injury or pests;
- normally developed;
- of similar varietal characteristics
- reasonably free from disintegrated berries or berries not intact.

More specific information on quality requirements for frozen berries can be found in the [Codex Alimentarius](#).

Labelling

Food must be labelled in accordance with regulations regarding the provision of food information to consumers. EU [Directive 2000/13/EC](#) lays down general rules on the labelling of pre-packaged food sold in the EU market. Note that this regulation will be replaced by [Regulation \(EU\) No. 1169/2011](#) on the provision of food information to consumers, as of 13 December 2014. In addition to these regulations, the [Codex Alimentarius](#) provides a voluntary standard and a reference for countries when they are



Source: [Innova database](#).

developing food law. Several basic requirements are recommended for labelling frozen berries:

- The name of the food as declared on the label shall include "raspberries" or one of the other berries as mentioned in the product definition.
- Either the words "quick frozen" or "frozen" should be mentioned on the label (use of terminology differs between countries and depends on which term is customarily used for describing the product).
- Liquid in which the berries are packaged must be listed near the name of the product. For example: "with (name of sweetener, and whether in its natural form or in the form of syrup)".

For frozen berries that are sold in bulk, the above mentioned information must either be placed on the container or be provided in the accompanying documents. The name of the food accompanied by the words "(quick) frozen", and the name and address of the manufacturer or packer must, however, appear on the container. Retail packs should bear clear directions regarding "use by" date, as well as directions for thawing.

Size and packaging:

Proper packaging of frozen berries is important to preserve the quality of the food and protect the product from contamination and damage during transportation. According to the [Codex Alimentarius](#), packaging used for quick frozen (rasp) berries must:

- protect the organoleptic and other quality characteristics of the product;
- protect the product against microbiological and other contamination;
- protect the product, as far as practicable, against dehydration, heat accumulation by radiation, and, where appropriate, leakage;
- not pass on to the product any odour, taste, colour or other foreign characteristic throughout the processing (where applicable) and distribution of the product up to the time of final sale.

Several types of (primary) packs can be used for frozen strawberries: 30% syrup pack (sugar with water), dry unsweetened pack or dry sugar (or sugar replacement) pack. The type of pack is usually selected according to the intended use for the strawberries. Syrup-packed fruits are generally used for cooking purposes, while dry-packed and tray-packed fruits are good for serving raw in salads and garnishes.

Marketing requirements for packaging differ widely among customers and market segments. Therefore, it is crucial that you discuss preferred packaging requirements with your customers.

Processing

The procedure for processing berries is as follows. First, full-flavoured, ripe berries of similar size preferably with tender skins are selected. The berries are sorted, washed, and drained. Subsequently, the berries are packed into containers and in some cases covered with cold 40



Source: Innova database and www.organicfinefood.com.au.

percent sugar syrup, with proper headspace. Finally, polyethylene freezer bags are sealed and frozen. This freezing operation is to be carried out in such a way that the maximum crystallisation temperature range is passed quickly. The quick freezing process should not be regarded as complete unless and until the product temperature has reached -18°C (0°F) at the thermal centre after thermal stabilisation. The recognised practice of repacking quick frozen products under controlled conditions is permitted. The processing requirements for different varieties of berries do not change significantly.

Buyer requirements

Buyer requirements can be divided into (1) *must* requirements, i.e. those you must meet in order to enter the market, such as legal requirements, (2) *common* requirements, those that most of your competitors have already implemented, i.e. you need to comply with these in order to keep up with the market, and (3) *niche market* requirements for specific segments.

A general overview of the [EU buyer requirements for processed fruits and vegetables](#) can be found on CBI's Market Intelligence Platform.



Requirements you must meet

Food safety: Traceability, hygiene and control

- Food safety is a key issue in EU food legislation. The [General Food Law](#) is the legislative framework regulation for food safety in the EU. To guarantee food safety and allow appropriate action in cases of unsafe food, food products must be traceable throughout the entire supply chain and risks of contamination must be limited. An important aspect to control food safety hazards is defining critical control points ([HACCP](#)) by implementing food management principles. Another important aspect is subjecting food products to official controls. Products that are not considered safe will be denied access to the EU.
- [Directive 89/108/EEC](#) lays down the specific requirements for quick-frozen foods intended for human consumption marketed in the EU.

Control of food imported to the EU

In the event of repeated non-compliance, specific products originating from particular countries can only be imported under [stricter conditions](#), e.g. accompanied by a health certificate and analytical test report. Products from countries that have shown repeated non-compliance are put on a list included in the Annex of [Regulation \(EC\) 669/2009](#).

Avoid contamination to ensure food safety

Contaminants are substances that may be present as a result of the various stages of growing, processing, packaging, transport or storage. The different forms of contamination are:

- Heavy metals: there are restrictions for lead and cadmium (see section 3 of Annex of Regulation (EC) No 1881/2006)
- Pesticides: the EU has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed will be withdrawn from the EU market.
- Foreign matter: contamination by foreign matter like plastic and insects are a threat when food safety procedures are not followed carefully.

More specifically, when tested by appropriate methods of sampling and examination, frozen berries:

- shall not exceed the maximum level of residues of pesticides;
- shall be free from microorganisms in amounts which may represent a hazard to health;

Considerations for action

- Search in the [EU's Rapid Alert System for Food and Feed \(RASFF\) database](#) to see examples of withdrawals from the market and the reasons behind them.
- EU buyers will often ask buyers to implement a food (safety) management system based on HACCP-principles (see under *Common requirements*).
- Read more about HACCP and health control in the [EU Export Helpdesk](#)
- To help you answer key questions about health control refer to the [guidance document](#) of the EU.
- Check if there are any increased levels of controls for your product and country. The list is updated regularly. Check the website of [EUR-Lex](#) for the most recent list (see under *Amended by*).
- Read more about [health control](#) in the EU Export Helpdesk.
- Check the European Commission's factsheet on food contaminants "[Managing food contaminants: how the EU ensures that our food is safe](#)"
- Read more about [contaminants in the EU Export Helpdesk](#)
- To find out the MRLs that are relevant for your products, you can use the EU [MRLdatabase](#) in which all harmonised MRLs can be found. You can search for your product or pesticide used and the database shows the list of the MRLs associated with your product or pesticide. Read more about [MRLs](#) in the EU Export Helpdesk.
- A good way to reduce the amount of pesticides, is applying integrated pest management (IPM) which is an agricultural pest control strategy that uses complementary strategies including growing practices and chemical management.

- shall be free from parasites which may represent a hazard to health; and
- shall not contain any substance originating from microorganisms in amounts which may represent a hazard to health.

Additives and flavourings

- Products can be rejected by buyers and EU customs authorities if they have undeclared, unauthorised or excessive levels of extraneous materials. There is specific legislation for [additives](#) (e.g. colours, thickeners) and [flavourings](#) that list which E-numbers and substances are permitted. If you want to add vitamins you will have to know which [vitamins](#) (see Annex I) and sources, vitamin formulations and mineral substances are allowed (see Annex II).
- No product specific legislation regarding composition applies to frozen berries.

Labelling

- If you are supplying consumer labelled product (in for example cans, jars or boxes) you will have to take into account labelling requirements laid down in [Directive 2000/13/EC](#). This should inform consumers about composition, manufacturer, storage methods and preparation.
- Specific labelling and quality requirements apply to [quick frozen](#) food.

Nutrition and health claims

Nutrition and health claims suggest or indicate that a food has a beneficial characteristic. They cannot be misleading. Therefore, only EU approved nutrition and health claims can be made. If new nutrition or health claims are made these have to be approved in advance by the [European Food Safety Agency](#) (EFSA).

Full overview of requirements for frozen berries:

For a list of requirements consult the [EU Export Helpdesk](#) where you can select your specific product code under chapter 08.

Common requirements

Food Safety Certification as a guarantee

As food safety is a top priority in all EU food sectors, you can expect many players to request extra guarantees from you in the form of certification. Many EU buyers (e.g. traders, food processors, retailers) require the implementation of a (HACCP-based) food safety

- Refer to the Buyer Requirement module on natural colour, thickeners and flavours for more information.
- E-numbers indicate approval by the EU. To obtain an E-number the additive must have been fully evaluated for safety by the competent food safety authorities in the EU (EFCH). For an overview of E-numbers refer to the Annex of [Regulation 1333/2008](#) (see under *Consolidated versions*).
- Read more about [legislation on authorised food additives and flavourings](#) under general conditions of preparation of foodstuffs

- In December 2014 [EU Regulation 1169/2011](#) will come into effect. This new labelling legislation will change current legislation considerably. For example, allergens will have to be highlighted in the list of ingredients and requirements on allergen information will also cover non pre-packed foods including those sold in restaurants and cafés. Read more on about the new labelling legislation on the EU [website](#).
- Read more about [food labelling](#) in the EU Export Helpdesk.

- For more information about [nutrition and health claims](#) refer to the website of the EU.

Considerations for action

- EU market entry preparation is likely to include implementing a food safety management system and it is therefore important to familiarise yourself with them.
- If you plan to target one or more markets, check which specific food safety

management system. The most important food safety management systems in France are [IFS](#), [FSSC22000](#) and [SQF](#). Different buyers may have different preferences for a certain management system, so before considering certification in line with one of these standards, you are advised to check which one is preferred. All of the aforementioned management systems are recognised by the [Global Food Safety Initiative \(GFSI\)](#), which means that they should be accepted by major retailers. However, in practice some buyers still have preferences for one specific management system.

Corporate responsibility

French buyers are paying increasing attention to their corporate responsibilities regarding the social and environmental impact of their business. This also affects you as a supplier. Common requirements include the signing of a suppliers' code of conduct which states that you conduct business in a responsible way, i.e. you (and your suppliers) respect local environmental and labour laws, avoid corruption etc. Furthermore, importers may also participate in initiatives such as the [Ethical Trading Initiative](#) or the [Business Social Compliance Initiative](#). These initiatives focus on improving social conditions in their members' supply chains. This implies that you, as a supplier, are also required to act in line with these principles.

Niche market requirements

Fairtrade Certification

- Fairtrade products are produced with extra focus on the social conditions in the producing areas. An example is [Fair Trade](#). Having your products certified is the most far-reaching way to prove your business performance with respect to social conditions in your supply chain. After certification by an independent third party, you may put the Fair Trade logo on your product. In general, premium prices are paid for fair trade products. Although growing, the market for Fair Trade certified products is still a niche market.

Organic, niche market

management systems are most commonly requested. In any case choose a management system that is GFSI approved.

- Read more on the different Food Safety Management Systems in the [Standards Map](#).
- When targeting France it might be interesting to assess your company's current performance by conducting a self-assessment, which you can find on the [BSCI website](#).
- Be aware that many of the environmental and social sustainability issues take place at farm level. To test to what extent your farmers are sustainable you could ask them to fill in the [Farmer Self Assessment](#) by the Sustainable Agriculture Initiative.
- Consider defining and implementing your own code of conduct. This is not required by buyers, but may be a good way to show potential buyers your views on corporate responsibility. Refer to the [code of conduct](#) of the Fruit Juice Association (AIJN) for inspiration. The AIJN represents a large share of the European fruit juice producers.
- Implementing a management system such as [ISO14000](#) (environmental aspects), OHSAS 18001 (occupational health and safety) or [SA 8000](#) (social conditions) is a way to address sustainability and possibly gain a competitive advantage. Research with your buyer whether this will be appreciated.

Considerations for action

- Check the Fair Trade Standards for [small producer organisations](#).
- Consult the [Standards Map database](#) for more information on the Fair Trade label.

- Organic berries are produced and processed by natural techniques (e.g. crop rotation, biological crop protection, green manure, compost). Although growing, the market is still relatively small. To market frozen berries in France as organic, they must be grown using organic production methods which are laid down in [EU legislation](#), and growing and processing facilities must be audited by an accredited certifier. Only then may you put the EU organic logo on your products.
- Although there is an EU-wide system for the regulation of organic farming, the [Agriculture Biologique](#) logo can continue to be used in France.

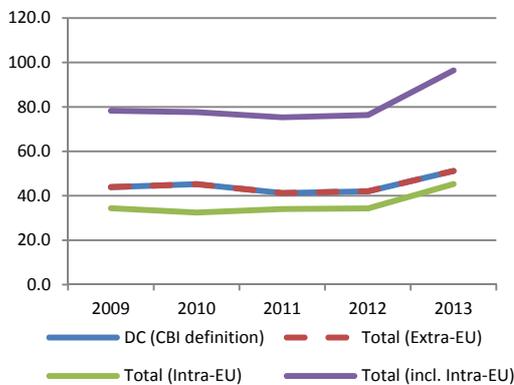
- Implementing organic production and becoming certified can be expensive. In the current market the return on investment may not be high. On the other hand it can increase yields and improve quality.
- Check the Soil Association standard for [Food and drink](#) to get an idea of the requirements of organic production.
- Consult the [Standards Map database](#) for the different organic labels and standards.
- Before applying for one of these certifications, we advise you to check your buyers' preferences for certain national labels.

Trade and Macro-Economic Statistics

General information and figures about production and trade developments for Processed Fruits and Vegetables in the EU market are provided in the [CBI Trade Watch](#). This section provides more detailed statistics on the trade, production and consumption of frozen berries in France.

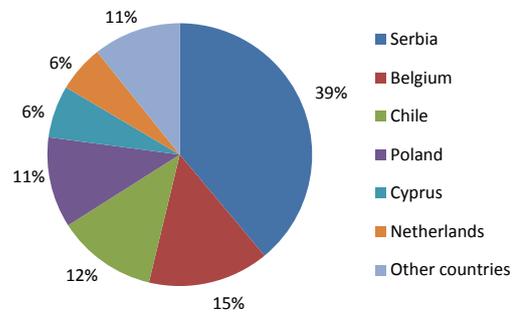
Imports and exports

Figure 1: French imports of frozen berries, in million euros



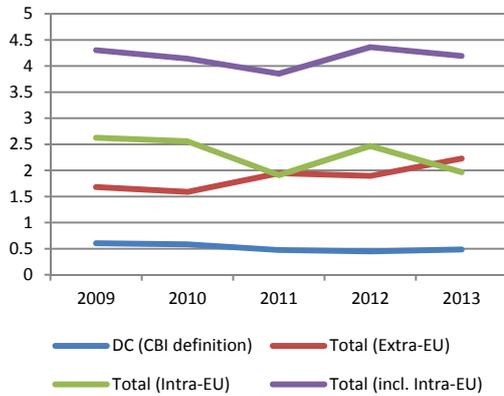
Data source: Eurostat database COMEXT. Figure compiled by LEI Wageningen UR.

Figure 2: French imports of frozen berries in 2013, by supplying country, in % of quantity



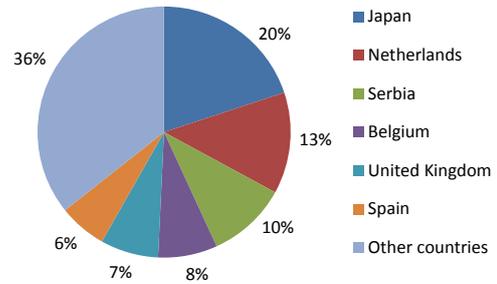
Data source: Eurostat database COMEXT. Figure compiled by LEI Wageningen UR.

Figure 3: French exports of frozen berries, in million euros



Data source: Eurostat database COMEXT. Figure compiled by LEI Wageningen UR.

Figure 4: French exports of frozen berries in 2013, by country, in % of quantity



Data source: Eurostat database COMEXT. Figure compiled by LEI Wageningen UR.

1 interpretation

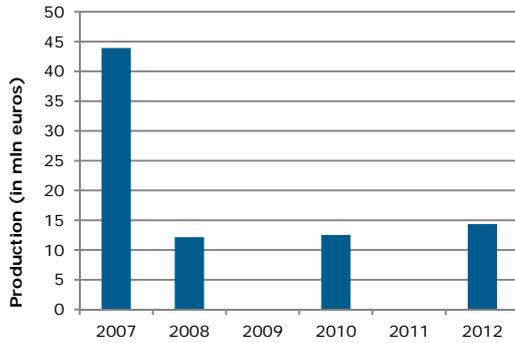
- In terms of value, total French imports of frozen berries grew from €78.3 million in 2009 to €96.4 million in 2013 (see Figure 1). In terms of quantity, growth was less pronounced, but still from 33,635 tonnes in 2009 to 43,481 tonnes in 2013.
- After Germany (€156 million in 2013), France is the second largest importer of frozen berries in Europe.
- About 45% of French imports are intra-EU imports. The main supply countries from Europe are Poland, Belgium, and to a lesser extent the Netherlands (see also Figure 2).
- The majority of imports are from outside the EU. The major extra-EU imports are from Serbia (39%), followed by Chile (12%) and Cyprus (6%). As such, almost all imports from countries outside Europe are imports from developing countries, as can be seen in Figure 1.
- Notice that Serbia grows about one-third of the world's raspberries and is a leading exporter of frozen fruit.
- Levels of exports of frozen berries from France are relatively low and remained relatively stable from €4.3 million in 2009 to €4.2 million in 2013 (see Figure 3). In terms of quantity, exports varied between 1,262 tonnes in 2009 and 1,241 tonnes in 2013.
- Figure 4 shows the main importing countries. Japan is the largest importing country of French berry exports. Interestingly, Serbia is also one of the main receiving countries of French exports, however it is also one of the main supplying countries of berries in France. Maybe these exports concern product returns.

Considerations for action

- Find a reliable intermediary or importer who can sell your products to the larger industries at a good price. In this context, it is worth exploring the possibilities of long term contracts to secure sales.
- The most important aspects to take into account when considering exporting to France are:
 - Professionalism: understand entrepreneurship in a European way; professional appearance and commercial insights are important.
 - Communication: French language skills are a must.
 - Logistics: timely delivery is important, but reliability of delivery is even more important (e.g., managing the risks of transport).
- Obtain information from your contact person in France about quality standards, delivery schedules and logistics requirements. Evaluate whether working capital, processing technology, logistics and the skill levels of your company employees are able to keep up with these requirements.
- French business culture typically involves formal interactions with a high degree of respect for authority. In business-to-business contacts, the communication is preferably in French.

Production and consumption

Figure 5: Production value of frozen fruits and nuts (including frozen berries)^{a)}, in France, 2007-2012, in million euros



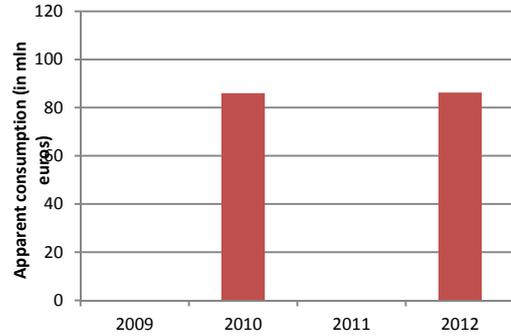
^{a)}The data is only available at this aggregate level (PRODCOM Rev. 2 NACE code 10392100). No data available for frozen berries only.

Data source: PRODCOM/Eurostat. Figure compiled by LEI Wageningen UR.

Analysis and interpretation

- Production data is only available at the aggregate level of frozen fruits and nuts (and not for all years). Looking at production, it is striking that production dropped after 2007 (and has remained relatively stable over the past four years).
- Production of frozen fruits and nuts in 2012 was about €14 million. Compared to countries like Poland and Italy, France is a relatively small producer of frozen fruits.
- Companies and traders who are active in the French market for frozen berries include [Ardo](#), [Rogers Descours Group](#), [Les Fruits Rouges de l'Aisne](#), [Pinguin Foods](#) and [Sabarot](#).
- Apparent consumption of frozen berries for 2012 in France was €86 million and has remained relatively stable over the past few years, although consumption has decreased compared to the years before 2009. No data is available for 2009 and 2011 (since production data is missing in these years). No clear explanation can be found for this decrease in consumption, although France is a saturated market when it comes to fruit consumption.
- In 2009, France consumed 14 thousand tonnes of berries. France is the 6th largest consumer in the EU, accounting for 3.7% of total EU consumption. Consumption increased by 9.7% per year between 2005 and 2009. In contrast, EU consumption increased by 4.0% per year. French consumption continued to grow during the economic crisis in 2008 (+35%) and 2009 (+3.5%).

Figure 6: Apparent consumption^{a)} of frozen fruits and nuts (including frozen berries)^{b)}, in France, 2007-2011, in million euros.



^{a)} Apparent consumption is the sum of imports and production reduced by exports. Variations are not taken into account. Domestic supply reflects direct usage by consumers and the industry.

^{b)} The data is only available at this aggregation level (PRODCOM Rev. 2 NACE code 10392100). No data available for frozen berries only.

Data source: PRODCOM/Eurostat. Figure compiled by LEI Wageningen UR.

Considerations for action

- More information on the production of frozen berries in France can be found on the website of [ADEPALE](#) (l'Association Des Entreprises de Produits Alimentaires Elaborés).

Market Trends

[CBI Trend Mapping](#) provides general trends in the European market for processed fruits and vegetables. This section provides more details about specific trends in the market for frozen berries in France.

Economic market drivers:

- Frozen fruits in France are benefitting from the economic recession, as consumers search for a more affordable alternative to fresh berries, as do consumers in other European regions. Generally, the market for frozen food products is currently expanding due to the fact that frozen products are cheaper than fresh produce.

Social market drivers:

- 'Super fruits' have become very popular as part of the trend among consumers in Europe towards healthier lifestyles. The word 'super' refers to supposed health benefits as a result of nutritional value and anti-oxidants. Berries that have been labelled as such are blueberries and raspberries; their popularity is expected to grow further as large companies jump on the 'super-fruit bandwagon'. Some popular berries like blackcurrants and blackberries are not commonly mentioned as super fruits despite their excellent nutritional properties, so there are still some marketing opportunities in this context.

Considerations for action

- The economic recession, which is still ongoing in France, offers opportunities for entering the country with exports as there is expected to be further room for frozen products in the coming years.
- Try to incorporate the health trend in product development. The trends of health and the ageing population offer strong potential for market segmentation. Targeted positioning and marketing and emphasising product 'health' and 'natural' characteristics or nutritional value, will add a premium.

Market Channels and Segments

With respect to frozen fruit and vegetables, a general market analysis of the European market is provided in [CBI Channels and Segments](#).

Market Competitiveness

With respect to processed fruit and vegetables, general information about market competitiveness in the EU market is provided in the [CBI Market Competitiveness](#).

Useful sources

Export and market entry support:

<http://www.cbi.eu/>

<http://exporthelp.europa.eu/thdapp/index.htm>

Certification schemes:

<http://www.isealalliance.org/>

<http://www.standardsmap.org/identify.aspx>

Marketing and trade standards:

<http://www.codexalimentarius.org/codex-home/en/>

Statistics and sector information:

<http://www.profel-europe.eu/>

<http://faostat.fao.org/>

<http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home/>

<http://comtrade.un.org/>

This survey was compiled for CBI by LEI Wageningen UR
in collaboration with CBI sector expert Freek Jan Koekoek

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