

Annex – Processed fruit and vegetables import trends in Europe

This annex to the CBI study on statistics and outlook on the European market of processed fruit and vegetables provides a deeper analysis of three large product groups separated by trade volume and their shares of the total European imports of processed fruit and vegetables as follows:

1. Large volumes – products whose imports account for more than 1% of all European processed fruit and vegetables imports, which is equivalent to approximately 390 thousand tonnes
2. Medium-sized volumes – between 0.5% and 1%
3. Small volumes – less than 0.5%

Although a 1% share may seem like a low cut-off and only 30 products exceed that, it is still equivalent to a relevant import volume. A product group with exactly 1% import share, for example, is frozen vegetable mixtures at close to 390 thousand tonnes, which is significant.

The tables show import volume, but the associated values place products in roughly similar positions, which is also true for individual supplying countries; the differences being negligible.

Large volumes: products with more than 1% import share

Table 1. European top imports of processed fruit and vegetables having above 1% import share

Product	Total import volume 2018, in tonnes	Import share from developing countries 2018	Total annual import growth rate 2014–2018	Annual growth rate of imports from developing countries 2014–2018
Shelled almonds	2,160,796	2%	1%	10%
Frozen vegetables	1,647,044	19%	4%	4%
Shelled cashew nuts	1,475,059	81%	17%	16%
Concentrated orange juice	1,468,510	66%	-4%	-4%
NFC orange juice	1,443,027	31%	5%	-2%
Frozen fruit	1,158,359	35%	7%	9%
Canned vegetables	1,066,564	24%	5%	7%
Canned tropical and other fruit	1,063,937	42%	8%	10%
Jams, jellies, marmalades, purees and pastes	1,057,781	13%	5%	4%
Shelled hazelnuts	1,041,421	72%	0%	-1%
Shelled groundnuts	987,150	75%	4%	7%
Fruit juice mixtures	985,138	2%	11%	13%
Tomato pastes and purees	954,072	10%	0%	-3%
Tropical and other fruit juices	852,650	30%	4%	5%
Shelled walnuts	847,469	36%	8%	7%
Concentrated apple juice	800,215	32%	5%	12%
Table olives	765,997	25%	7%	5%
Pistachios in shell	759,049	19%	5%	9%
Canned tomatoes	744,816	5%	0%	4%
Dried grapes	670,546	75%	-2%	1%

Other canned vegetables and vegetable mixtures	621,897	4%	12%	8%
Pickled vegetables	608,788	37%	5%	4%
Dried vegetables	597,457	36%	3%	5%
Frozen berries	578,423	48%	0%	3%
Frozen strawberries	555,479	41%	10%	12%
Pine nuts, pecans and other nuts	513,268	38%	8%	6%
Canned sweetcorn	444,951	6%	0%	-7%
Frozen orange juice	422,897	41%	-3%	-5%
NFC apple juice	399,325	2%	13%	-14%
Frozen vegetable mixtures	387,757	2%	3%	11%

Source: Trade Map

From analysing the table above, the six most promising products for exporters from developing countries are cashew nuts, frozen fruit, canned tropical fruit, peanuts, tropical juices and shelled walnuts.

In spite of not ranking among the five leading products in import share, the following products also contributed significantly to the growth in imports from developing countries: table olives, dried grapes, pickled vegetables, dried vegetables, pine nuts, pecans and other exotic nuts.

Medium-sized volumes: products with 0.5% to 1% import share

In the group of products whose import share falls between 0.5% and 1% (see table 2), the following products contributed the most to the growth in imports from developing countries; the leading developing countries of origin for each product group are also indicated:

1. Pickled cucumber and gherkins – Turkey, India, Serbia, Lebanon, Vietnam and North Macedonia;
2. Shelled pistachios – Iran, Turkey, Syria, Kyrgyzstan, Afghanistan and Tajikistan;
3. Dried peaches, pears, papayas, tamarinds and other edible fruits – China, South Africa, Thailand, Chile, Turkey and Ghana;
4. Concentrated single citrus fruit juice – Argentina, Brazil, South Africa, Pakistan, Mexico and Uruguay;
5. Desiccated coconuts – Philippines, Indonesia, Sri Lanka, Vietnam, Malaysia and Ghana;
6. Canned green beans – Kenya, Madagascar, India, Cameroon, China and Turkey;
7. Shelled Brazil nuts – Bolivia, Brazil, Chile and Peru;
8. Canned preserved citrus fruit – with Turkey, China, Eswatini, Peru, Morocco, Costa Rica and Mexico.

Other products that also contributed to the growth in imports of processed fruit and vegetables from developing countries include canned beans, dried cranberries, frozen peas and in-shell walnuts. Still, these products are not considered as having good export potential for most developing country suppliers for various reasons. For example, European companies, often large multinationals, control the supply of canned beans and frozen peas. In another example, only two or three countries supply in-shell walnuts and dried cranberries.

Table 2. European imports of processed fruit and vegetables having between 0,5% and 1% import share

Product	Total imported volume 2018, in tonnes	Import share from developing countries 2018	Total annual import growth rate 2014–2018	Annual import growth rate from developing countries 2014–2018
Canned preserved button mushrooms	340,132	2%	5%	-26%
Canned pineapples	335,961	76%	0%	-1%
Canned fruit mixtures (compotes)	328,715	15%	2%	0%
Pickled cucumbers and gherkins	308,122	36%	6%	4%
Shelled pistachios	287,703	42%	9%	16%
Dried peaches, pears, papayas, tamarinds and other edible fruits	263,587	44%	4%	1%

Concentrated single citrus fruit juice	261,790	43%	7%	10%
Mixtures of nuts or dried fruits	260,338	4%	6%	7%
Canned beans	259,981	4%	4%	23%
Desiccated coconuts	251,964	79%	5%	3%
Homogenised preparations of jams, fruit or nut purees and nut pastes	246,598	2%	13%	-20%
Canned green beans	225,595	38%	5%	11%
Canned peaches	221,889	4%	-4%	-16%
Dried cranberries	213,827	10%	9%	16%
Frozen peas	213,598	6%	-1%	6%
Walnuts in shell	211,968	21%	-6%	6%
Dried prunes	193,095	49%	-3%	1%
Canned preserved asparagus	186,000	88%	-6%	-6%
Canned preserved strawberries	184,639	5%	4%	-4%
Brazil nuts, shelled	179,956	71%	13%	12%
Canned preserved citrus fruit	175,482	40%	5%	6%

Source: Trade Map

Small volumes: products with less than 0.5% import share

Table 3 details the group of products with less than 0.5% share of European imports of processed fruit and vegetables. The product with the most potential for developing country exporters in this group is shelled macadamia nuts, which have experienced very strong recent import growth. Since 2014, European macadamia nut imports increased from 26 thousand tonnes to more than 32 thousand tonnes.

In the group of products with import share lower than 0.5% (see table 3), the following products contributed the most to the growth in imports from developing countries; the leading developing countries of origin for each product group are also indicated:

1. Shelled macadamia nuts – South Africa, Kenya, Malawi, Guatemala, Mozambique and China;
2. Not-from-concentrate pineapple juice – Costa Rica, Thailand, Benin, Madagascar, Brazil and India;
3. In-shell groundnuts – Egypt, China, Togo, Argentina, India and Cameroon;
4. Dried apples – China, Chile, Turkey, Moldova, Kyrgyzstan and Argentina;
5. Concentrated grapefruit juice – South Africa, Mexico, Paraguay, Turkey, Cuba and Egypt;
6. Not-from-concentrate grapefruit juice – Mexico, South Africa, Cuba, Brazil, Turkey and India;
7. Canned mushrooms – China, Serbia, Russia, North Macedonia, Malaysia and Turkey;
8. Fresh and dried kola nuts – India, Ivory Coast, Jamaica, Nigeria, Cameroon, Togo and Guinea.

Table 3: European imports of processed fruit and vegetables having between 0,5% and 1% import share

Product	Total imported volume 2018, in tonnes	Import share from developing countries 2018	Total annual import growth rate 2014–2018	Annual import growth rate from developing countries 2014–2018
Frozen green beans	171,949	7%	2%	10%
Preserved and canned cherries	161,869	9%	-1%	-1%
In-shell chestnuts	160,536	26%	0%	0%
Shelled macadamia nuts	152,995	59%	12%	19%
Dried onion	146,696	45%	-3%	-5%

Concentrated grape juice	145,117	9%	-1%	11%
NFS pineapple juice	134,442	51%	5%	8%
Concentrated pineapple juice	133,933	62%	-7%	-5%
Frozen spinach	132,137	2%	1%	5%
Frozen sweetcorn	129,830	9%	-1%	8%
NFC grape juice	128,197	1%	0%	3%
Dried apricots	127,955	79%	-6%	-8%
Canned peas	124,547	3%	-2%	3%
In-shell groundnuts	123,160	65%	2%	5%
Candied fruit and vegetables	115,705	23%	-1%	1%
Other dried mushrooms	114,534	63%	-5%	-7%
Dried apples	110,349	33%	8%	4%
Cranberry juice	97,843	11%	-3%	9%
Canned apricots	96,088	28%	-1%	-7%
Canned pears	91,168	27%	-1%	-4%
Concentrated grapefruit juice	87,717	45%	3%	6%
NFC grapefruit juice	79,712	40%	4%	7%
Citrus fruit marmalades	49,458	4%	4%	4%
Canned mushrooms	49,132	26%	2%	1%
In-shell almonds	48,249	5%	2%	19%
Baby food vegetable purees	45,831	6%	1%	28%
Tomato juices	41,434	3%	4%	8%
Frozen lentils, chickpeas and other beans	39,240	25%	5%	-2%
Canned bamboo shoots	35,098	62%	-1%	0%
Shelled chestnuts	34,882	5%	12%	2%
Canned palm hearts	34,303	87%	-4%	-2%
Dried Agaricus mushrooms	27,195	20%	-2%	-20%
In-shell hazelnuts	19,685	4%	-21%	-56%
In-shell cashew nuts	10,129	24%	6%	-3%
Dried wood ear mushrooms	6,068	91%	-2%	0%
In-shell brazil nuts	5,846	21%	-11%	-14%
In-shell macadamia nuts	3,623	11%	-14%	-35%
Fresh and dried kola nuts	1,388	59%	3%	7%
Dried jelly fungi	707	67%	-14%	-6%

Source: Trade Map