

Entering the European market for canned fruits and vegetables

Last updated:

06 October 2020

Food safety certification such as BRCGS and IFS certification certainly helps to get access to Western European markets. The strongest existing competitors to new suppliers of many canned fruits and vegetables are European countries, and China and Turkey from outside Europe. If you focus on finding a specialised importer and on products that are not yet available in Europe, you will have the best chance of a successful market entry.

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1. What requirements must canned fruits and vegetables comply with to be allowed on the European market?

What are mandatory requirements?

All foods including canned fruits and vegetables sold in the European Union must be safe. This applies to imported products as well. Additives must be approved. Harmful contaminants such as pesticide residues above the MRL, or excessive levels of mycotoxins or preservatives, are banned. It should also be readily obvious from the labelling whether food contains allergens. Cans and other materials used for packaging must be corrosion-resistant and free from contaminants such as cadmium or bisphenol A (BPA).

Due to the optimisation of processing lines and sterilisation used in canned beans, microbiological contamination is not a frequent issue on the European market. However, physical and chemical contamination still is.

Contaminants control in canned food

The [European Commission Regulation](#) sets maximum levels for certain contaminants in food products. This regulation is frequently updated. Apart from the limits set for general foodstuffs, there are also a number of specific contaminant limits for specific products. For canned products, there is one important limit on inorganic tin (maximum 200 mg/kg).

Pesticides Residues

EU legislation has been laid down to regulate the presence of [pesticide residues \(MRLs\) in food products](#). Therefore, alternatives should be considered, including the use of non-chemical methods and implementing Integrated Pest Management (IPM). Actually, food canning operations, in particular washing, blanching, peeling and cooking processes, lead to a gradual decrease in residue levels. More than 50% of pesticide residues can be removed by washing and blanching, except in peaches. For example, through hot water blanching,

ethylenebisdithiocarbamates (EBDCs) are completely removed from spinach and tomatoes. Overall, food canning operations can remove 90-100% of pesticides in most products.

Other contaminants

Reasons for border rejections or market withdrawals of canned foods from the European market often relate to foreign bodies in the can, or defective packaging sometimes caused by corrosion.

In reality, the most frequent problems are corrosion of packaging, excessive content of preservatives and colouring, as well as migration of materials from the packaging into the fruit such as tin or cadmium. These rejections and other food safety issues are handled directly by the trade without the government intervening.

Tips:

To be prepared for potential new changes in the MRLs, read the Ongoing Reviews of MRLs in the Rapid Alert System for Food and Feed, which has reported several alert notifications for canned fruit and vegetable products imported to Europe. Check the [list of notifications on canned fruits and vegetables](#).

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

What additional requirements do buyers often have?

Quality requirements

The most common quality requirements for canned fruits and vegetables are the following:

- Normal colour, flavour and odour of canned fruits and vegetables;
- Uniform size;
- Specific composition of the packing medium;
- Minimum fill of 90% of the volume of the packaging.

[Codex Alimentarius Standards](#) for quality requirements for specific canned fruits and vegetables are listed in Table 2 below.

Table 1: Codex Alimentarius standards for canned fruits and vegetables

Type of product	Codex Alimentarius standard
Fruit	Canned applesauce Canned pineapple Canned raspberries Canned strawberries Canned fruit cocktail Canned tropical fruit salad Canned chestnuts and canned chestnut purée Canned stone fruit (apricots, peaches, plums, cherries) Certain canned citrus fruits (grapefruit, mandarin oranges, sweet orange and pumelo) Certain canned fruits (mangoes and pears)
Baby foods	Canned baby foods
Vegetables	Canned bamboo shoots Pickled fruits and vegetables Certain canned vegetables (asparagus, carrots, wax beans, green peas, palm hearts, processed peas, sweet corn, baby corn, mushrooms)
Vegetable preparations	Regional Standard for Canned Humus with Tehena Regional Standard for Canned Foul Medames Regional Standard for Tehena

Tip:

Refer to the [Codex Alimentarius](#) for practical guidelines that can support you in fulfilling the requirements of European food safety legislation. Specifically for canned fruits and vegetables, those guidelines include: Guideline Procedures for the Visual Inspection of Lots of Canned Foods for Unacceptable Defects; Code of Hygienic Practice for Canned Fruit and Vegetable Products; Code of Hygienic Practice for Low and Acidified Low-Acid Canned Foods; Code of Practice for the Prevention and Reduction of Inorganic Tin Contamination in Canned Foods.

Food safety certification

Although food safety certification is not obligatory under European legislation, there are legal guidelines for producers regarding food hygiene safety and traceability. Most established European importers will not work with you if you cannot provide some type of food safety certification.

The majority of European buyers will ask for certification recognised by the [Global Food Safety Initiative](#) (GFSI). For canned fruits and vegetables, the most popular certification programmes, all recognised by GFSI, are:

- [International Featured Standards \(IFS\)](#);
- [British Retail Consortium Global Standards \(BRCGS\)](#);
- [Food Safety System Certification \(FSSC 22000\)](#).

Please note that this list is not exhaustive and that food certification systems are constantly developing.

Although different food safety certification systems are based on similar principles, some buyers may prefer one specific management system. For example, British buyers often require BRCGS, while IFS is more common for German retailers. Also, note that food safety certification is only a basis to start exporting to Europe. Most buyers will usually visit/audit your production facilities within one or a few years (or before even starting to do business with you).

Corporate Social Responsibility

Companies have different requirements for corporate social responsibility. Some companies will require adherence to their code of conduct or the following common standards including the Supplier Ethical Data Exchange ([SEDEX](#)), Ethical Trading Initiative ([ETI](#)) or Business Social Compliance Initiative code of conduct ([BSCI](#)). If canned fruits and vegetables are aimed at the retail segments, suppliers will be asked to follow the specific code of conduct developed by the retailers. Many retailers have their own code of conduct in place. Examples are [Lidl](#), [Rewe](#), [Carrefour](#), [Tesco](#) and [Ahold Delhaize](#).

Packaging requirements

Packaging used for canned fruits and vegetables must:

- Protect the taste, colour and other quality characteristics of the product;
- Protect the product from bacteriological and other contamination (including contamination from the Packaging material itself);
- Not pass on any odour, taste, colour or other foreign characteristics to the product;
- Be corrosion-resistant (in case of tin cans).

It must be ensured that there is no migration of unsafe levels of chemical substances from the packaging material to the food. In Europe, the use of the inside lining material bisphenol A is banned in baby bottles. Canned fruit and vegetable purées are very common ingredients in baby food.

Consumer packaging varies between aluminium cans, plastic containers, glass jars and plastic pouches. Products in B2B consumer packaging are packed in trays and cartons in various sizes depending on the product and the requirements of the buyer.

There is no general rule for the export size of the packaging, so the packaging varies from retail sizes of around 400 g (for retail sale) to around 3 kg (for the food service sector). Most packaging in the retail sector contains 400 g of weight. Retail packaging contains around 0.05 l to 2.0 l. In some cases, cans are not labelled with retail labels but exported to European buyers which put labels on retail packaging.

Labelling requirements

The following labelling is used in the trade of canned fruits and vegetables:

- Type of product, including style (whole, halves, quarters, slices, pieces, diced and so on) and declaration whether the fruits are 'peeled' or 'unpeeled';
- Defined minimum drained weight;
- Shelf life;
- Composition of the product (packing medium, additives);
- For non-retailer packaging, specifications including crop year and variety.

Information for non-retail packaging must be given either on the container or in accompanying documents.

Packaging labelling must contain the following information:

- Name of the product;
- Lot identification;
- Name and address of the manufacturer, packer, distributor or importer;
- Storage instructions.

However, the lot identification as well as the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark.

In the case of retail packaging, product labelling must comply with the European Union Regulation on the [provision of food information to consumers](#). This regulation defines nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information) more clearly.

From 1 April 2020, new EU rules took effect requiring food businesses to label foods with the country of origin or place of provenance of primary ingredients. These requirements are set out in [Commission Implementing Regulation \(EU\) 2018/775](#) and apply alongside existing rules in the EU Food Information Regulation (No. 1169/2011). If a product is made from several ingredients, the indication of origin must be placed for the ingredients that represent more than 50% of the product. For example, if canned lychees are labelled with 'Made in the Netherlands', the origin of fruit must also be indicated. This can be done by indicating a country (e.g. Vietnam) or by indicating 'non-EU' or declaring 'lychees do not originate from the Netherlands'.

Picture 1: Shipping label example



Source: Integrated Business Communications Alliance

For more information on technical guidance of food allergen labelling and information requirements under the EU Food Information for Consumers, check this [Food Allergen Labelling Guide](#).

Picture 2: Example of allergen advice on the retail packaging



Source: health direct

Canned lupin beans are also considered an allergen and must be indicated on the packaging. Allergens also include sulphites, which are used in the production of canned beans. Sulphites need to be indicated as a potential allergen if levels exceed 10 mg/kg or 10 mg/l.

Canned vegetables are sometimes produced together with sauces and spices. Some spices, such as celery, mustard and cumin, are also potential allergens and must be indicated on the packaging.

Tip:

Dig into several food certification schemes and reflect on the added value for your products in your target markets. If you consider certification as necessary, carefully select a certifying company and consult with your preferred buyers about their certification preferences.

What are the requirements for niche markets?

Organic canned vegetables

To market canned vegetables (or canned fruits, although that market is relatively small) as organic in Europe, the raw material must be grown using organic production methods according to [European legislation](#). Growing and processing facilities must be audited by an accredited certifier before you may put the European Union's organic logo on your products, as well as the logo of the standard holder (for example, [Soil Association](#) in the United Kingdom or [Naturland](#) in Germany).

Note that importing organic products to Europe is only possible with an [electronic certificate](#) of inspection (e-COI). Each batch of organic products imported into the EU has to be accompanied by an electronic certificate of inspection as defined in Annex V of the Regulation [defining imports of organic products from third countries](#). This electronic certificate of inspection has to be generated via the [Trade Control and Expert System](#) (TRACES).

Sustainability certification

For an overview of the developments of the sustainability initiatives in the European market, read our study on [Trends on the European Processed Fruit and Vegetables Market](#).

Sustainability is a broad term with many aspects, and there is still no world-wide recognised sustainability certification covering all aspects. One of the aspects increasingly used is to publish CO2 emission rates on products, but it is very difficult to have reliable measuring for those claims. However, some private certification schemes are in development. Currently, the most famous certification schemes focus on environmental impact and ethical aspects.

[Fair Trade](#) certification schemes are not very frequently used for certification of canned fruits and vegetables, but they are applied to canned pineapple, canned mango and also some canned vegetables. Fairtrade International has developed a specific standard for [prepared and preserved fruit and vegetables](#) for small-scale producer organisations.

Ethnic certification

The Islamic dietary laws (Halal) and the Jewish dietary laws (Kosher) propose specific restrictions in diets. If you want to focus on Jewish or Islamic ethnic niche markets, you should consider the implementation of [Halal](#) or [Kosher](#) certification schemes.

Tips:

Consult the [Sustainability Map database](#) for information on a wide range of sustainability labels and standards.

Check the [guidelines for imports of organic products into the European Union](#) to familiarise yourself with the requirements of the European organic market.

Refer to the [best corporate social responsibility \(CSR\) practices of Bonduelle](#) for an example of independent certification programmes aimed at environmental protection and corporate social responsibility. As part of its partnership with the [Réseau Alliances](#), Bonduelle formalises 20 best practices in all areas of corporate social responsibility each year.

2. Through what channels can you get canned fruits and vegetables on the European market?

Compared to other processed fruit and vegetables segments in Europe, canned fruits and vegetables are not used as often as ingredients in the food processing industry. Large quantities are sold directly in the retail segment under importers' or private label brands, or in the food service segment.

How is the end market segmented?

Figure 1: End-market segments for canned fruits and vegetables in Europe



It is difficult to indicate the amount of canned fruits and vegetables sold directly through retail and the amount used by the food processing industry. There are large differences amongst the different types of products. For instance, the retail sector is responsible for approximately 50% of sales of canned pineapple, while the other 50% is divided between food service and the food industry.

Retail

Retailers sometimes buy directly from developing country exporters, but in the majority of cases, intermediaries are involved. A recent development is the polarisation of the retail sector into discounters and high-level segments. Consolidation, market saturation, strong competition and low prices are key characteristics of the European retail food market.

Leading retail chains in Europe differ per country. The companies that hold the largest market shares are Schwartz Gruppe (Lidl and Kaufland brands), Carrefour, Tesco, Aldi, Edeka, Leclerc, Metro Group, Rewe Group, Auchan, Intermarché and Ahold (Delhaize, Albert Heijn and several other brands).

Industrial

Canned fruits and vegetables are also used as ingredients by the food processing industry in two ways:

- The ready-meals industry: this is a significant user of canned vegetables (mainly for pizzas, pastas, soups and fresh and frozen meals);
- The meal components industry: this industry is an important user of canned vegetables. Other food sectors, such as the baby and infant food industries, use a variety of preserved fruit and vegetables.

Food Service

The food service segment (hotels, restaurants, and catering) is usually supplied by specialised importers (wholesalers). Food service often requires specific packaging in the range of 1-5 kg, which is different from bulk or retail packaging packs.

Through what channels do canned fruits and vegetables end up on the end-market?

Large quantities of canned fruits and vegetables are sold in the retail segment under importers' or private label brands, or in the food service segment. The most important channel is importers.

Figure 2: European and EFTA market channels for canned fruits and vegetables



Importer/Wholesalers

Specialised importers are the preferred channel for market entry in this sector. As canned beans and pulses are usually traded in retail can format of 400 g, exporters should contact wholesalers that are able to supply retail segments directly. The specialised importers in practice are private label suppliers or ethnic products importers. The position of importers is particularly strong for specialised canned products, as importers/traders continue to play a role as consolidators and sourcing specialists.

Food manufacturers (ingredients)

Compared to other fruit and vegetables processing industry segments in Europe, canned fruits and vegetables are used as ingredients much less often. Most canned products are sold directly in the retail segment under the importer's or private label brands, or in the food service segment. Examples of canned products used by the industry are mushrooms, garlic and tomato paste.

Direct supply to food retail or food service

In some cases, you can supply the food retail or food service segment directly, without an importer as intermediary. However, this does not happen often, as these segments are often supplied via a tender procedure. Some ethnic shops (such as Asian or Mediterranean stores) or chains may import canned fruits and vegetables directly too.

The food service segment has a significant share in the European market for canned fruits and vegetables. This segment requires bigger packaging (up to 5 litres) and non-branded products of a standard quality. Reaching the food service segment directly is difficult due to procedural requirements, so you should search for specialised food service suppliers.

Examples of importers of canned fruits and vegetables in the leading European importing countries include [OttoFranck](#) (Germany), [Victor-Konserven](#) (Germany), [Clama](#) (Germany), [Kreyenhop & Kluge](#) (Germany), [Henry Lamotte](#) (Germany), [Natco Foods](#) (UK), [Gama](#) (UK), [Goodies Foods](#) (UK), [Indo European Foods](#) (UK), [S.O.P International](#) (UK), [Opa Distribution](#) (France), [Samgab](#) (France), and [Agidra](#) (France).

For more information, read our tips for [Doing business](#) and [Finding buyers](#) on the European market for processed fruit and vegetables.

What is the most interesting channel for you?

Specialised canned fruits and vegetables importers are the best contacts for exporting to the European market. This is specifically relevant for new suppliers, as supplying the retail segment directly is very demanding and requires a lot of quality and logistical investments. Importers usually have a good knowledge of the European market. Therefore, they are your preferred contact, as they can inform you in good time about market developments and provide practical advice for your exports.

For the larger exporters of canned fruits and vegetables, submitting an offer through a purchasing tender by large discount food retailers such as Aldi and Lidl can be an option.

The growing European demand for certain exotic fruits and vegetables is definitely a good opportunity. Ethnic grocery stores have a steady and growing customer base because they offer different food products from their own home country and from other countries of their region. Most of these exotic retailers are specialised in certain countries' food products (Asian, Arabic, Indian, Russian, etc.).

3. What competition do you face on the European canned fruits and vegetables market?

Which countries are you competing with?

The canned fruits and vegetables market is dominated by European producing countries. Italy, Spain, Germany, the Netherlands and France are your key competitors in the main markets, followed by China. Though small in comparison, Egypt and Morocco are good examples of competitors from developing countries.

Main competition comes from Europe

Italy

Italy is by far the largest supplier to the European market. Canned tomatoes are the #1 canned export product of Italy. With an export value of €1.7 billion (2.2 million tonnes), canned tomatoes represent almost 70% of Italy's export value of canned fruits and vegetables. The balance is left for canned beans (11%, €274 million) and miscellaneous products (6%, including products such as artichokes). Two-thirds of exports go to other European countries. The main destinations are Germany, the United Kingdom and France. Other important markets are the United States, the Netherlands, Australia and Japan.

Italy's canning activities are centred in and around Naples (south-central Italy), while a small share comes from the city and surroundings of Bologna in the north of the country. Most of the tomatoes are grown in the Foggia area and other parts of the Apulia province, which is almost 200 km away from Naples. The region of Tuscany is home to large-scale production of tomatoes as well.

Tomatoes are the main ingredient for adding acidity to food, and in the world of global cuisines, this especially applies to the authentic Italian pasta dishes. The most popular tomato is the plum-shaped tomato, and a large number of varieties are being used for canned tomatoes, from early varieties to late varieties. [Examples of varieties used in the Tuscany regions](#) are listed in Italian by an Italian blogger.

In recent years, the production of Italian tomatoes has been criticised for exploitation of migrant workers under questionable conditions, along with the use of cheap imported Chinese tomato paste. Brands/companies that were associated with such practices were Mutti and Conserve Italia; both are large private companies from the north.

Spain

Spain's good location in the Mediterranean area allows it to produce almost ten million tonnes of fruit annually. Approximately 5-10% of this is processed, mainly as preserves, making Spain one of Europe's main producers and exporters of canned fruits. Production of canned fruits mostly takes place in the region of Murcia, mainly of peaches, followed by mandarins, apricots and pears. Spain is one of the two largest producers of canned peaches in the European Union. Together with Greece, the country accounted for more than 90% of the total European production. Some subtropical fruits such as mango and papaya are also produced in canned form.

For vegetables, most growing and production takes place in the regions of Murcia and Valencia. Other well-known areas are Navarre and La Rioja, the latter mainly because of preserved asparagus, peppers and artichokes. Growing and canning activities also take place in Extremadura, Aragón, the two Castiles, Andalusia and Catalonia.

The largest export product of Spain is canned olives. With an export value of €700 million, canned olives represent 40% of total export value. Canned tomatoes are the second product, with €403 million (22% share). Export values of the other products are much smaller; miscellaneous products (including asparagus, pepper, artichokes) represent 8% of the export value, canned mushrooms 4% and peaches and mandarins each also 4%. 60% of Spanish exports go to other European countries. Spain's leading export markets are France and the USA. Other important destinations are the United Kingdom, Germany and Italy.

Germany

Germany's number one single export product is canned mushrooms, with an export value of €127 million in 2019. Canned mushrooms are followed by canned mixtures (€116 million), canned gherkins (€114 million) and canned pickled fruits (€61 million). Almost 90% of exports go to other European countries. France is the largest export market (€128 million export value), followed by the Netherlands (€94 million), Austria (€88 million) and Poland (€73 million).

The Netherlands

The Netherlands is one of the world's largest exporters of agricultural products, including food products. The main export product is canned green and miscellaneous vegetables (spinach, green beans, asparagus); with an export value of €276 million, this product is good for 20% of total canned fruits and vegetables exports. Other top export products are canned mushrooms (19%), blends (17%), cranberries (9%) and beans (6%). More than 90% of exports go to other European countries, predominantly to Germany, while Belgium, France and the UK also receive Dutch canned vegetables in substantial values.

Most of the fruit and vegetable raw materials used for the processing are grown in the Netherlands on contract basis. This includes, for example, the group of outdoor crops such as spinach, peas, carrots, (green) beans, beetroot and white and red cabbage. The most important raw material that needs to be imported is beans. An important brand and producer in the Netherlands is the company Hak.

France

France is one of the largest agricultural production countries in the world and is home to a large production of fruits and vegetables. As a logical result, there is also an important canning industry in the country that produces for the local market in the first place, but also for exports. The largest export product is canned peas (no exact value known, but at least more than €120 million), followed by canned sweetcorn (€128 million) and canned green beans (no exact value known). Cauliflower is an important vegetable for France's domestic fresh market and its exports, but during production peaks, a large quantity ends up being processed (a small part of it is canned as well, but the lion share goes to frozen). France exports most of the canned products to neighbouring countries Germany, Spain, the United Kingdom and Belgium.

French production is dominated by Bonduelle, while the other players are predominantly small and medium-sized enterprises that produce private label products and a lot for discount retailers, for which they compete strongly on price because of overcapacity in the country.

Supply from developing countries

One quarter of European imports from developing countries are canned fruits, followed by canned asparagus and a variety of vegetables (each 10%), pineapple (9%), olives (7%), tomatoes (6%) and beans (5%). China is the largest country in this group, followed at quite some distance by Peru and India.

China - main competitor from outside Europe

China is the leading supplier of canned fruits and vegetables from developing countries, predominantly with exports of canned olives and canned asparagus (both €98 million). Other large export products for the European market are canned tomatoes and canned mandarins. China's main destination in Europe is Germany (123 million), followed by Spain (96 million), the Netherlands (€55 million), Italy (€53 million), France (€44 million) and the United Kingdom (€38 million).

In particular, China has become one of the largest producers of and markets for canned mushrooms. The mushrooms from China are usually packed in briny water and not only canned in retail packaging sizes, but often also in drums. The same applies to garlic, which China exports in canned products as well. China dominates the world market for garlic.

The Maghreb region

European imports from the Maghreb region totalled €142 million, and two-thirds of that value is canned olives. The balance is left for canned tomatoes, canned apricots and miscellaneous vegetables. 95% of canned fruits and vegetables from this region come from Morocco.

Egypt

European imports from Egypt totalled €55 million, and 42% of that value is canned olives, 16% canned tomatoes, 20% a range of vegetables, 9% canned strawberries and 7% canned miscellaneous fruits. Canned strawberries have shown the highest growth in recent years, but exports remain few compared with the huge exports of frozen strawberries.

Tips:

Identify who the biggest importers of your product are in selected large or fast-growing markets.

Be prepared to face strong competition if you are an exporter of types of canned fruits and vegetables that are also grown in Europe. However, you can learn from developing countries which have found ways to enter the European market with new products. Good examples are South Africa with the export of canned apricots, the Philippines with fruit cocktails, China with fruit cocktails, peaches, pears, beans and mandarins and Thailand with sweetcorn.

Get information about the canned fruits and vegetables industry and export strategies of fast-growing countries from sectoral associations, as well as on main market information portals such as [IEGVu](#).

Consider exporting canned products which are not produced in Europe, such as tropical fruits and vegetables.

Regularly visit leading European trade fairs such as [ANUGA](#), [SIAL](#) or [Food Ingredients](#) to meet your competitors.

Which companies are you competing with?

Worldwide, the best-known companies in the canning industry are the large companies, of which several are publicly listed. In the canned fruits segment, think of companies like Del Monte Fresh Produce, LBO France (French equity fund, owner of MOM Group/Materne fruit compotes brand), Andros, Conserve Italia and Dole. Del Monte is the leading trader of canned pineapples in Europe and the world. In the canned vegetables segment, some of the largest players are Bonduelle, General Mills, CECAB Group, Orkla, Grupo di Luca and HAK. Several of these companies also, or mainly, operate in Europe, such as Bonduelle and HAK. While these companies have large shares in certain countries and segments, your products will often not compete with these products, as their range is huge and the relationships with customers strong. Instead, you will more likely compete with smaller companies, namely the small and medium-sized enterprises. Examples of such companies are mentioned below.

There are many producing, processing and export companies of canned fruits and vegetables supplying the European markets. It is not easy to select only one company in each of the supplying countries in order to demonstrate specific characteristics of the leading suppliers. Each company has its own strategies for exports to the European market. Therefore, the examples listed below are just illustrations of some of the leading exporters of canned fruits and vegetables in the main supplying countries.

Italian companies

The canned tomato industry in Italy consists of over 600 producers, exporters and brokers. This number has declined over the years, as consolidation has taken place and large factories increase their output by 10% every year. There is a sharp contrast between the north and the south of Italy. In the south, the canneries are second-generation family businesses with their own label. In the north, the private companies are large conglomerates with well-known brands such as Mutti, or with a range of private labels. In the north, these companies buy 200-litre barrels of tomato products and repack them into pasta sauces, crushed tomatoes or industrial paste. In the mid-north, there are also cooperatives of farmers. The processing of these cooperatives is not the traditional canning but tetra pack packaging and is not only used for tomatoes but also for fruit processing.

To give an idea of the companies from the north versus the south, two examples are shortly profiled here. Conserve Italia Group, from the north, is a huge Italian co-operative that brings together over 14,500 farmers and represents one of Europe's largest agri-food companies. Every year, Conserve Italia processes over 650,000 tonnes of produce: fruit, vegetables and tomatoes, which are cultivated by its farmer members spanning an area of over 25,000 hectares.

Picture 3: Italian leading brands of canned foods



[Napolina](#) is a company from Naples, established more than 60 years ago. Napolina's product range has over 140 products, such as tomatoes, tomato purées, beans and pulses. The brand is the #1 Italian cooking brand in the United Kingdom.

Picture 4: The Napolina brand



Spanish companies

When technology progressed in the previous century, small-scale, family-run businesses developed in-house canned food production. These companies have grown and have become large vegetable processing companies. They are still mostly located in the areas where the products are grown. Two examples of such companies are Ferba Preserved Food and Mensajero.

[Ferba Conservas](#) was founded in 1950 and was a pioneer in manufacturing preserved food. While it originally focused on asparagus, mushrooms and artichokes, the company nowadays processes all fruits and vegetables that can be sourced in its own region. Almost 80% of the production is exported all over the world.

Picture 5: The Ferba brand



[Mensajero](#) was founded in 2000 as an initiative to concentrate the manufacture of canned vegetables from several family-owned canneries in the town of Bullas (Murcia) in one place and in a single entity. The company produces canned pears, peaches, apricots, tomatoes and artichokes.

Picture 6: The Mensajero brand



Not all companies are medium-sized family companies. This is shown by the example of [Riberebro](#), which is a venture capital & private equity company. At the same time, the origin of this entity comes from three family businesses in the La Rioja region. It was created from three canned food brands: Gvtarra, Ja'e and Ayecue.

Picture 7: The Riberebro brand



German companies

Germany is a large country and has canned vegetable facilities spread across the country. Most of them are second-generation family business and predominantly process raw material from the region. Their product range at least includes products that are popular in Germany, such as gherkins, beetroot, capsicum and celery.

Most production facilities are located in the south of Germany. More specifically, in the area of Lower Bavaria. Examples of companies in that region are:

- [Eggerstorfer](#), a small family company with 50 employees and IFS certification;
- [Straubinger Konserven](#), a small IFS-certified family company with a focus on gherkins and cabbage ('sauerkraut');
- [Meiko](#), a small family company with production of canned pickles, pickled vegetables and fruits.

Picture 8: The Eggerstorfer brand



There are also companies in other regions in Germany, as proven by the following companies:

- [Stollenwerk](#), a medium-sized cannery in the province of North Rhine-Westphalia (middle-west of the country). This company uses raw material from its own farmland and also from private contracted farms. Its range is larger than that of most other canneries and includes fruit in jars, pickled gherkins in jars, pickled salads in jars/tins and vegetables in jars;
- [Aldim – Bio Schorfheider Produkte](#), a small organic and IFS-certified cannery north-east of Berlin, close to the Polish border. The company has a small range of the most popular German pickled vegetables;
- [Hainich Konserven](#), a small to medium-sized cannery in Thuringia with production of pickles, fruit preserves, sweet spreads, cabbage and other vegetables and salads.

The largest companies that represent the largest share of production in Germany are producers of fruit jams and of gherkins:

- [Zentis](#), located in Aachen, in the west of Germany, with more than 1,000 workers and an international profile with locations in Poland, Hungary, Russia and the USA;
- [Schwartauer Werke](#), with 800 employees, located in the north of Germany and specialised in jams;
- [Carl Kuhne KG](#), producer of gherkins with a well-known brand (Kuhne) in many European countries. The company has several facilities in several regions and more than 1,000 employees in total;
- [Hengstenberg](#), with 500 workers and 3 production facilities in several regions.

Note that Zentis and Schwartauer produce not only fruit jams but most importantly fruit fillings for industrial customers.

Dutch companies

The country is home to several fruit and vegetable canneries. While canned mushrooms are produced by a few dedicated mushroom processors such as [ProChamp](#), all other canned vegetables are produced by a group of five canneries. Each of the canneries has a unique business strategy, varying from a focus on the organic

market or a location in the Betuwe fruit area to production of canned fruit products like jams, or private label production.

The Dutch company [Hak](#) is the largest cannery in the Netherlands and is also the #1 brand of canned vegetables in the Netherlands. This company is strong in marketing and product innovation, which can be seen from its introduction of stand-up pouches for preserved vegetables, vegetable dishes, salad enrichers and one-portion packages.

[Baltussen](#) is a medium-sized cannery with production of a wide range of preserved vegetables in glass under its own brand and also private label production. Baltussen has specialised in production of organic conserves, which represent 30-40% of its production output. It has developed particular expertise in the development of organic production chains along with farmers and retailers.

Other canneries are [Coroos](#) (strong representation of private label production) and [Geurts](#), which is the only canned fruit producer in the Netherlands.

French companies

French production of processed vegetables is dominated by one well-known, publicly listed company: [Bonduelle](#). It is a family-run company and is the world leader in ready-to-use vegetables, in all their forms. Bonduelle provides over 100 countries with vegetables that are preserved using natural processes, in line with the fundamental values at the base of the company's creation and development. Bonduelle canning activities are concentrated within three facilities in France: Estrées Mons, Vaulx Vraucourt and Renescure.

Picture 9: The Bonduelle brand



Another well-known brand in France, but less active on the international market than Bonduelle, is [d'Aucy](#).

Chinese companies

China's fruit and vegetable canning industry has developed rather quickly in recent decades. It has led to the development of several medium-sized manufacturers that produce a range of processed fruit and vegetables with a very strong focus on exports. Typically, their range is larger than that of European manufacturers, while their locations are strategically chosen from a raw-material perspective. A few examples are given below:

- [Acroyali](#) – production and export of canned fruits, fruit fillings and toppings, fruit jams, canned vegetables, canned beans and nuts and peanut butter. With up to more than 300 people in the peak season, they pack products in metal tins, glass jars and pouches, all available from retail to food-service size;
- [Ovisen](#) – production and export of canned mushrooms, fruits and compotes, vegetables, seafood and raw material, mostly beans, for canning;
- [Fresh Food Co.,LTD](#) – Fresh Food has 5 production lines and capacity of 10 thousand tonnes per year for production of canned mushrooms, corn, lychees, longan fruits, water chestnuts and fish;
- [Zhangzhou Trading](#) – production of canned mushrooms, garlic and other products, and it also sells a lot of mushrooms and garlic in drums to industrial customers worldwide;
- [Shandong Lixing Tin Food](#) – a young and dynamic company (since 2003) with a lot of certificates (IFS, kosher, etc) and private label production for exports all over the world.

Developing countries

Because of the relatively capital-intensive nature of canning, there is not much canning capacity in developing countries. However, there are some examples that show that companies in these countries can become successful. One of these examples is the company [Hagimex](#) from Vietnam. Hagimex is specialised in pickled gherkins. Hagimex is BRC and IFS-certified and has managed to contract Aldi for the supply of canned pickled

gherkins to Germany.

Egyptian companies

In Egypt, there are a few companies exporting canned fruits and vegetables. Most of them focus on olives, but several are able to can other products as well:

- [Americana](#) – part of the Americana Group with 25 food production sites in the Middle East. Production in Egypt entails olives in tin cans and jars and olive oil in bottles;
- [SFI-Egypt](#) – focusses on canned olives, but also offers peppers, sun-dried tomatoes, pickled vegetables and artichokes. Canning only takes place in drums for B2B sales;
- [Almekka](#) – focusses on olives, but also offers cucumbers, onions, lemons, pickles, peppers, grape leaves and sorted vegetables;
- [Natura](#) – canning of artichokes, strawberries, peaches, grapes, apricots, vine leaves, pomegranates, peppers and olives;
- [Harvest Foods](#) – canning of beans, green peas, okra, chickpeas and pastes, tomato paste, sweet corn. Production is mostly for Egypt and the surrounding countries.

Which products are you competing with?

Traditionally, the main competition came from the product category of fresh fruits and vegetables. A well-known example is canned pineapple rings and pieces. Until the 1980s, people hardly knew fresh pineapple. They were used to eating canned pineapple. With the mainstream introduction of fresh pineapple, however, canned pineapple lost quite some market volume in the European Union.

Another product category that is in competition with canned fruits and vegetables is frozen fruits and vegetables. This is a more recent development of the last 5 to 10 years. Taking canned pineapple as an example again, canned pineapple has secured a good market position in the last 20 years because of its ready-to-eat, ready-to-use and shelf-stable characteristics, but the segment of frozen pineapple has grown considerably in the past decade. Frozen pineapple is on par in terms of user-friendliness, for example. While canned pineapple can be kept at ambient temperatures, frozen pineapple needs to be kept in a freezer. On the other hand, a can of pineapple, once opened, needs to be consumed within a few days. On the contrary, frozen pineapple can be taken from the package in the necessary portion size, and the remainder can be put back in the freezer.

- Read CBI studies on [the demand for fresh fruit and vegetables on the European market](#) to understand fresh products competition.
- Read [CBI studies](#) on frozen fruits or vegetables (e.g. frozen vegetables, frozen berries, tropical frozen fruits) to understand competition from these products.

4. What are the prices for canned fruits and vegetables?

The range of canned fruits and vegetables is wide, and for that reason, indications of margins are rather rough. Additionally, comparisons between competing countries are not easy, as different countries produce different types, packaging sizes, fruit or vegetable varieties and qualities.

As a rough estimation, the Cost, Insurance and Freight (CIF) price represents between 25-50% of the retail price. The lower the number of chains between exporter and retailer, the higher this share will be. At the same time, in comparison with other processed fruit and vegetables, canned products are relatively finished products and need less extra processing and packaging in Europe. For that reason, the difference between the CIF price and the shelf price for canned products is lower than for many other processed fruit and vegetables.

A rough indication of margins in the value chain is shown in Table 2. The table also shows what this means in absolute terms for a pot of sliced pickles and a can of mango slices sold in a European supermarket.

Table 2: Canned fruits and vegetables retail price breakdown

Steps in the export process	Type of price	Margin %	Example - sliced pickles in pot of 530 grammes	Example - mango slices in can of		
			Absolute margin in €	Price/kg in € (drained)	Absolute margin in €	Price/kg in € (drained)
Production of fruits or vegetables	Raw material price (farmers' price)	5-15%	-	€0.60	-	€2.40
Handling, processing and selling canned products	FOB or FCA price	30-40%	€1.20	€1.80	€0.90	€3.30
Shipment	CIF price	5%	€0.20	€2.00	€0.15	€3.45
Import, handling, distribution	Wholesale price (value added tax included)	10-15%	€0.40	€2.40	€0.45	€3.90
Retail	Shelf price	40-50%	€1.60	€4.00	€1.95	€5.85

Source: Market researcher compilation based on industry sources

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

- Origin (which production country);
- Quality (varying from season to season and from country to country);
- Global demand versus global supply;
- Conventional or certified canned products: Fairtrade mango slices are more expensive than conventional; organic mango slices are more expensive than Fairtrade mango slices;
- Price of raw material versus contract prices. In the case of - for example - canned pineapple from Thailand, there is a raw material price that fluctuates from week to week and depends on the world pineapple prices. At the same time, canned pineapple processors and exporters have contracts (for a year/half year) with their international customers. The FOB prices in such contracts follow prices of the raw material. This means that

the FOB prices follow the trend of raw material prices with a delay. In the case of canned pineapple rings and pieces from Thailand, this delay is about half a year;

- Type of product and retailer's pricing strategy. For several products in the canned fruits and vegetables range, retailers prefer to keep stable prices for final consumers even in cases of fluctuating import prices.

Tip:

The best option to monitor prices is to compare your offer with the offer from the largest competitors for your products. This is not a one-time operation. Price levels should be monitored over time and also over different stores/channels and countries.

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