

# Entering the European market for pickled cucumbers and gherkins

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Food safety certification, combined with reliable and frequent laboratory testing, can help create a positive image for suppliers wishing to export to Europe. Sustainable production and corporate social responsibility measures will help give emerging suppliers a competitive advantage. The toughest existing competitors for new suppliers of pickled cucumbers and gherkins are companies in EU member states such as Germany and the Netherlands. Companies from Turkey and India are the toughest competitors outside Europe.

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## 1. What requirements must pickled cucumbers and gherkins comply with to be allowed on the European market?

All foods sold in Europe must comply with EU Commission regulations. Additives must be within approved and permitted levels. Harmful contaminants such as bacteria, viruses, pesticide residues and excessive levels of heavy metals are prohibited. Labelling must also clearly state if a food contains allergens and preservatives, and what the nutrition content is.

### What are mandatory requirements?

#### Food safety standards

Food safety is a critical part of EU food legislation. The European Commission has developed a food safety strategy covering every step, from farm to fork, as set out in [The General Food Law](#). This gives food safety the highest priority and ensures unsafe food does not enter the market. Under the law, foods must be completely traceable throughout the supply chain. To achieve this, all food business operators have to implement the [Hazard Analysis of Critical Control Points \(HACCP\)](#) system in their day-to-day operations. Action is taken against suppliers of unsafe foods and food products, including possible denial of access to the EU.

#### Tip:

The General Food Law created the European Food Safety Authority (EFSA), which is responsible for developing specific food safety legislation and a framework for official food inspection. See the [EFSA website](#) and [newsletters](#) for updates on European food safety developments.

#### Border control

A portion of import shipments are subject to inspection at the border. Failure to provide necessary

documentation or comply with regulations results in stricter controls, and repeated non-compliance may even lead to suspension. Goods imported from countries that are repeatedly non-compliant are listed in the Regulation on the [increase of official controls](#). Individual cases are also reported through the [Rapid Alert System for Food and Feed \(RASFF\)](#), which is accessible for the general public.

## Contaminant control

Contaminants are unwanted substances in food products that affect food constitution, purity and nutrition. The [European Commission Regulation](#) has set maximum levels for certain contaminants in food products. This regulation is stringent and frequently updated. There are also extensive measures in place to avoid food-related contaminants. Products in violation of these limits are banned from entering the European market.

### Tips:

See [Regulation \(EC\) No 1881/2006](#) for the maximum levels of permitted contaminants in foodstuffs.

Read about border rejection cases in the [European Rapid Alert System for Food and Feed annual reports](#).

The EU regularly publishes and updates a [list of pesticides](#) approved for use.

Get updates on recent notifications for Israeli traders with [SI 58 rules](#).

Read more about maximum residue levels on the European Commission's [website on MRLs](#). To be prepared for any new changes in MRLs, read the [ongoing reviews of MRLs in the European Union](#).

Find MRL levels for your products in the EU [MRL database](#) and download the list of permitted pesticide levels.

## Food additives

Food additives are substances that are not normally consumed as food itself, but added for preservation. Rules for food additives are set out in the European Commission [Regulation 1333/2008](#). [Codex Alimentarius](#) standards published by the Food and Agriculture Organization (FAO) and World Health Organization (WHO) specify permissible food additives, maximum levels and conditions for use. Food additives must be approved and may not be misleading about product freshness, quality, quantity or origin.

## Heavy metals and metalloids

Restrictions apply to the use of lead, tin and cadmium in processed fruits and vegetables. These metals, which accumulate on green vegetables, can come from the natural environment, such as soil or growing pots. Canned pickles have a risk of high tin concentrations, depending on the type of can used (according to a 2022 EU regulation amendment, new tin cans have a safe coating on the inside to prevent contamination) ([see section 3 of Annex of Regulation \(EC\) No 1881/2006](#)).

Table 1: Maximum limits of contaminants under the Codex Alimentarius

Heavy metals and metalloids	Contamination limit
Tin (Sn)	250 mg/kg, calculated as Sn
Lead (Pb)	1 mg/kg

## Unwanted foreign particles

The presence of any foreign matter such as insects, plastic pieces, stones, metals or glass make the product unsuitable for clearance. Products must be thoroughly checked and carefully reviewed prior to export to Europe.

## What additional requirements do buyers often have?

### Quality requirements

Pickled cucumbers and gherkins must meet the following quality requirements as set out in the [Codex Alimentarius](#):

- Colour: cucumbers should have normal colour characteristics typical of the variety, type of packaging and style.
- Texture: cucumbers should be reasonably firm, crisp and practically free from shrivelled, soft and flabby parts and reasonably free from very large seeds.
- Flavour: cucumbers should have a good flavour typical of the type of product and taking account of any flavouring or special ingredients used.
- Size descriptions.
- Mineral impurities: all styles and types of cucumbers, except peeled, no more than 0.08% m/m.
- The code specifies allowable defects in cucumbers used.

Permitted optional ingredients in pickled cucumbers are water, vinegar, salt (sodium chloride), vegetable oils, nutritive carbohydrate sweeteners, paprika, herbs, spices, condiments, vegetables (not exceeding 5% of the total weight of a product, except in the sub-type mustard, which may be less than 30%).

Table 2: [Acid and salt allowances per pickle type](#)

Sub-type	Total acidity (as acetic acid)	Salt (NaCl)	Salt-free soluble solids
(a) Dill	0.4% to 2.0%	1.0% to 4.5%	-
(b) Sour	0.7% to 3.5%	1.0% to 5.0%	-
(c) Sweet sour	0.5% to 2.0%	0.5% to 3.0%	1.5% to less than 14%
(d) Sweet	0.5% to 2.5%	0.5% to 3.0%	14.0% minimum
(e) Mustard	0.5% to 3.0%	1.0% to 3.0%	-
(f) Salt sour	0.5% to 3.5%	5.0% to 10%	-
(g) Mild	0.4% to 0.7%	1.0% to 3.5%	-
(h) Hot	0.5% to 3.0%	1.0% to 3.0%	-

### Food safety certification

Food safety certification is a must for almost all European food importers. The majority of buyers in Europe ask for a certification recognised by the [Global Food Safety Initiative](#) (GFSI). Some of the most popular certifications are:

- [International Featured Standards](#) (IFS)
- [British Retail Consortium Global Standards](#) (BRCGS)

- [Food Safety System Certification \(FSSC 22000\)](#)

Other voluntary certifications

- **EurepGAP:** compliance with market standards set by EurepGAP2 can help smallholders obtain and maintain international market access, particularly to the European Union. The standards cover agricultural production processes for the certified product from pre-planting to harvest. The EurepGAP certification scheme is based on a supply-chain partnership of retailers, produce suppliers/growers and associate members from the agricultural input and service sectors (for more information, see [www.eurep.org](http://www.eurep.org) (login required)).
- **Safe Quality Food 2000:** SQF 2000 is a retailer-driven initiative founded by the Food Business Forum and run by the US-based Food Marketing Institute, and is recognised by the GFSI. It works with food safety codes and quality system requirements for the food industry, with the aim to supply food that is safe and meets quality and legislative requirements. SQF 2000 applies the concepts and principles of HACCP, good manufacturing practice (GMP), good hygiene practice (GHP) and GAP.

Note that this is only a partial list and that food certification systems are constantly under development. Most food safety certification schemes are based on existing ISO standards, such as [ISO 22000](#).

Although different food safety certification systems are based on similar principles, some buyers prefer a particular system. For example, British buyers often require BRC, while IFS is more common for German retailers. Also note that food safety certification is only a basis from which to start exporting to Europe, and serious buyers usually also visit the production facilities.

## Packaging requirements

Packaging requirements are crucial for entering the EU market:

- Minimum fill (pickles plus packing medium): containers should be well-filled with cucumbers and the product (including packing medium) should not be less than 90% of the water capacity of a container.
- Minimum volume fill for whole and whole curved styles: cucumber ingredients should occupy no less than 55% (cured type) or 53% (fresh-pack type) of the total container capacity (volume).
- Minimum volume fill for all styles except whole: of the total capacity (volume) of a container, fruit and vegetable ingredients should occupy:

(a) no less than 55% in the case of fresh pack; and

(b) no less than 57% in the case of cured.

Packaging must protect the product from contamination and leakage. The [Codex Alimentarius](#) provides information about packaging for individual fruits and vegetables, such as different styles, sizes and hygiene requirements for product packing. Marketing requirements for packaging differ widely among customers and market segments.

## Labelling requirements

The [General Standard for Labelling of Pre-Packaged foods](#) applies to pickled cucumber and gherkin labelling.

Labels must state:

- Name under which the product is sold;
- List of ingredients;
- Allergen information (mandatory);
- Net weight of pre-packaged products;
- Minimum shelf life;
- Country of origin;
- Special conditions for storage or use;
- Business name and address of the manufacturer, packager or seller based in the EU;
- Lot marking on pre-packaged products;

- Food packed in a liquid medium must display the drained weight of the food alongside the net contents in the metric system;
- Nutrition information (the European Commission is working on various proposals, including harmonised regulations for the display of nutrient content on the front of product packaging, as part of the Green Deal's Farm to Fork Strategy);
- Information about the origin of primary ingredients, if different from the stated place of origin (mandatory requirement as from 1 April 2020).

Specific rules for information to be displayed on pickled cucumber and gherkin labels:

1. Product name: Pickled Cucumbers, Cucumber Pickles, Pickles or Gherkins;
2. Pack type: fresh or cured;
3. Pack style and sub-type, including names of herbs;
4. Dill sub-type: natural dill or genuine dill for cucumbers fermented naturally in a low salt concentration brine;
5. Approximate count range for containers larger than 4 litres in whole style.

The EU requires the label text to be written in one of the official languages of an EU member state and be easy for consumers to understand. Specifications for nutrition labelling, net quantity, use-by date, date of freezing, process undergone, origin, allergens and legibility (minimum font size for mandatory information) apply to pickled cucumbers and gherkins.

### Tip:

Get food safety certification. Consult with preferred buyers about their certification preferences and carefully select a certifying company.

## Green Deal

In 2019, the European Commission presented the Green Deal, containing measures for sustainable agriculture, consumption and the economy. This is expected to bring major changes to the European fruit and vegetable industry, impacting suppliers in the EU and worldwide. Overall, the aim is a climate-neutral society by 2050. As an intermediate step, by 2030 CO<sub>2</sub> emissions must be lowered 55% (compared to 1990), the use of pesticides reduced by 50%, and 25% of farming must be organic. The Green Deal's Farm to Fork Strategy sets out specific measures for the food industry, including to encourage vegetable consumption.

The Green Deal may require major changes to the manufacturing processes and cost structures of developing country suppliers.

## Corporate Social Responsibility (CSR)

EU companies have more, though varying, CSR requirements. Some companies require suppliers to sign a code of conduct stating they conduct business in a responsible manner and in line with local, environmental and labour laws. Some also require adherence to common standards such as the Supplier Ethical Data Exchange ([SEDEX](#)), Ethical Trading Initiative ([ETI](#)) or Business Social Compliance Initiative Code of Conduct ([BSCI](#)). Suppliers of pickled cucumbers and gherkins to retail segments will be asked to follow the specific code of conduct developed by retailers themselves. Many environmental sustainability and social responsibility issues are taken up at the farm level. Farmer sustainability is tested using the Sustainable Agriculture Initiative's [Farmer Self-Assessment](#) form.

## What are the requirements for niche markets?

### Organic and artificial preservative-free

Increasing awareness of the dangers of GMO products, chemical preservatives, artificial colours and additives is leading to higher demand for organic pickles in Europe. Global demand for organic pickled cucumbers and gherkins is also rising, with Europe making up a large share. [EU Regulations](#) set out requirements for marketing

organic food in Europe.

All food producers, processors or traders wishing to market their goods as organic must be registered with an inspection authority. Farms that want to produce organically have to undergo a conversion process. EU governments offer various forms of support to help organic producers get started. Growing and processing facilities must be audited by an accredited certifier before the EU's organic logo can be placed on products. The [Agricultural European Innovation Partnership \(EIP-AGRI\)](#) works to foster competitive and sustainable organic farming in Europe.

### **Tips:**

To read more about payment, delivery and other practical issues, see the CBI study on [Organising Your Export to Europe](#).

Learn about organisations and legal guidelines for organic farming on the [EcoEurope Quality and Traditions](#) website.

Note that to import organic products into Europe you need to have an [electronic certificate](#) of inspection (e-COI). Each batch of organic products imported into the EU has to be accompanied by an e-COI, as defined in the [EU Regulation](#). This certificate has to be generated via the [Trade Control and Expert System \(TRACES\)](#).

Many manufacturers/suppliers that produce or distribute organic products require additional certifications from private eco-associations to label products as organic. Some private organic farming associations are [Natureland](#), [Bioland](#) and [Demeter](#).

### **Sustainability certification**

Sustainability is a broad term including environmental, social and economic aspects. There is no one internationally recognised sustainability certification covering all of them. The most important aspects currently are carbon neutrality, climate change, environmental and social governance policies and using recyclable packaging materials. Many companies make their CO2 emission rates public, but such claims are hard to verify. However, private certification schemes are under development. The best-known certification schemes focus on environmental protection and ethical trade. Implementing a management system such as ISO14000 (environmental aspects), OHSAS 18001 (occupational health and safety) or SA 8000 (social conditions) is one way to address sustainability and possibly gain a competitive advantage.

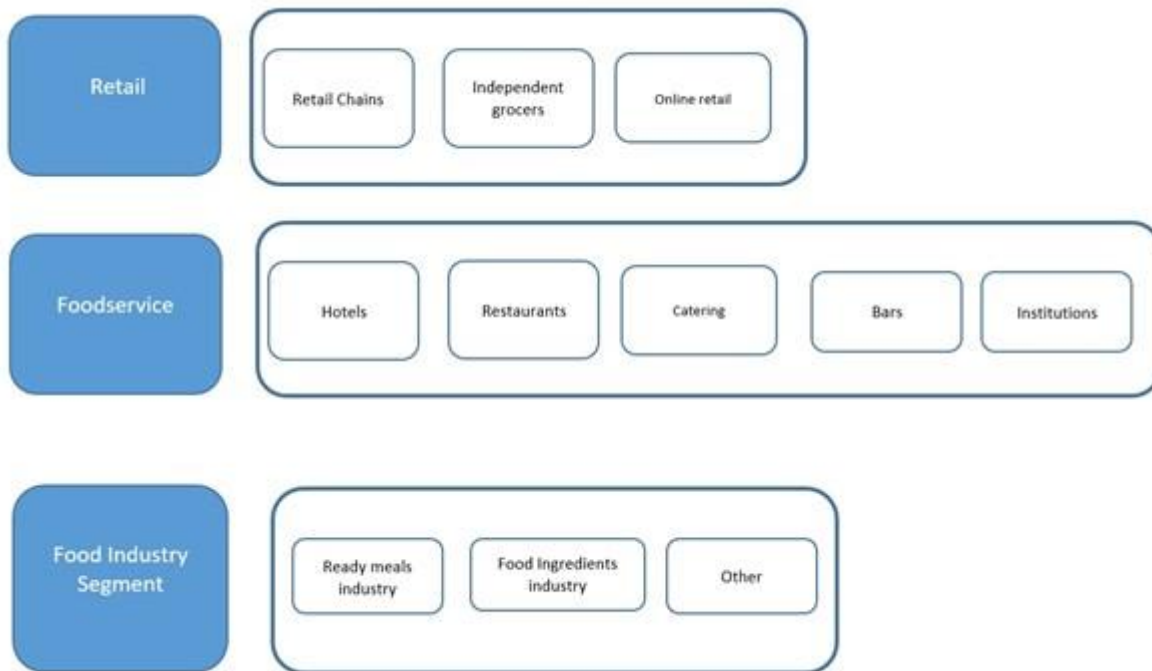
## **2. Through what channels can you get pickled cucumbers and gherkins on the European market?**

Manufacturers and processors are working with local farmers in their respective countries or those from which cucumbers/gherkins are sourced and processed for fermentation. Most other suppliers of pickled cucumbers and gherkins import the end products and re-pack them for sale under private labels to retailers or the food service sector.

### **How is the end market segmented?**

The retail, food service and food industry segments are the largest users of pickled cucumbers and gherkins. Households are also major consumers of pickles, including pickled cucumbers and gherkins, onions, red cabbage, beetroot, carrots, olives, jalapenos and varied mixtures.

Figure 1: End market segments for pickled cucumbers and gherkins in Europe



Source: CBI Market Intelligence

## Retail segment

Large retail chains tend to import pickled cucumbers and gherkins from developing countries through intermediaries or source them from neighbouring EU countries. Usually, large-scale retail chains source cucumbers from local farms and process them (sorting, grading, washing, chopping, fermentation) in-house to sell under their private labels. They ensure specifications and quality requirements are met. As well as selling plain pickled cucumbers and gherkins, retailers also have in-house kitchens to season and re-pack them for end customers based on quantity specifications.

Many leading retail companies in Europe are active in more than one country. Some private label manufacturers selling to retail chains are Ahold (Delhaize) and [Van Der Kroon Food Products](#).

Figure 2: Branded products on shelves of retail supermarkets in Europe



Source: Pixabay

Figure 3: Traditional, family-owned pickles sold across retail shops



Source: [Pixabay](#)

## Food service segment

The food service segment (hotels, restaurants and catering businesses) has different requirements for pickled cucumbers and gherkins as compared to retailers. These businesses usually source their supplies from large manufacturers or distributors. They prefer to have contracts with suppliers to sustain the quality of output. Larger companies tend to source in bulk rather than small packs. Restaurants worldwide have long used pickle-based sauces with different spice mixes and condiments such as mustard seed paste and vinegar-based products to enhance dishes. Pickles are also gaining popularity as a cocktail ingredient among consumers seeking interesting and offbeat flavours, especially the younger generation.

Some wholesale companies catering to the food service segment are [Kesbeke](#) and [N.W. van Ruiten B.V.](#) (the Netherlands), [SpreewaldRabe](#) and [Paulsen](#) (Germany), [Hugo Reitzel](#) (Switzerland/France).

[Hugo Reitzel](#) is a company with extensive experience supplying the food service sector, offering a wide range of convenient solutions for food service professionals.

## Food processing segment (food ingredient industry)

Compared to the retail and food service industries, demand for pickled cucumbers and gherkins is low in the food processing industry. They are used mainly as ingredients in salad dressings, relishes, sauces and in the seasoning processing industry. Pickled olives and jalapenos are mainly used in frozen pizza, but the use of frozen gherkins is limited. [N.W. van Ruiten B.V.](#) is one company that supplies to the food processing segment.



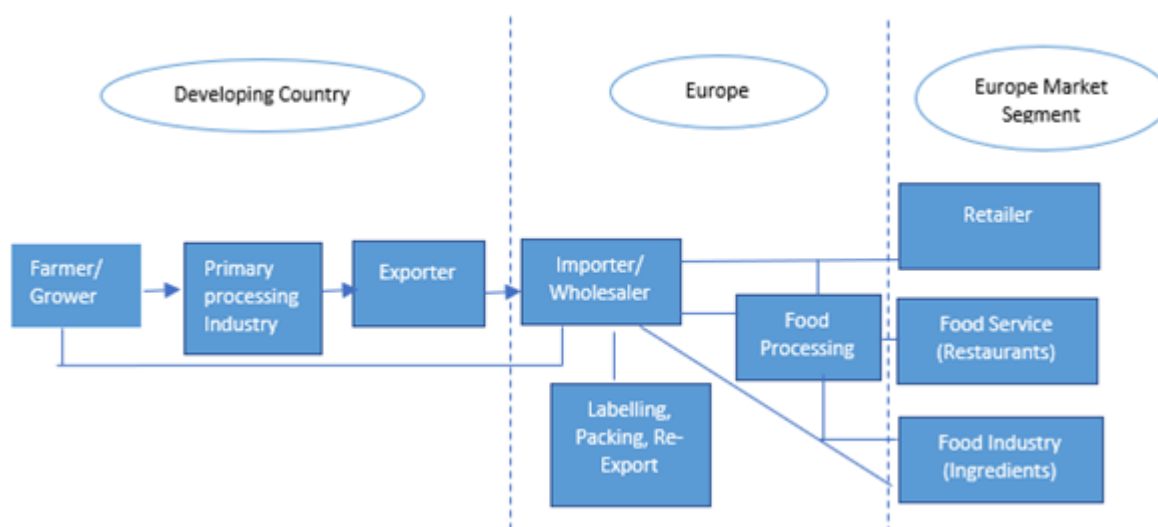
## Tips:

End customers for canned or jarred pickled cucumbers and gherkins are largely the retail, wholesale and food service sectors.

Building long-term relationships (and signing contracts) with large established European buyers can help you gain a stronger market position.

## Through what channels do pickled cucumbers and gherkins reach the end market?

Figure 4: European market channels for pickled cucumbers and gherkins



Source: CBI

In Europe, importers choose a preferred channel based on their core strength.

Some importers source cucumbers and gherkins from bulk producers based on specialities such as:

1. Unique taste
2. Fewer seeds
3. Higher water content
4. Voluminous or slender product
5. Organically farmed
6. Genetically blended

These importers work with long-term contracts, maintain a unique identity and follow Europe's stringent food industry regulations.

Bulk suppliers of cucumbers and gherkins pickled in vinegar are the second category of importers. They import in large plastic drums or metal barrels that are suitable for food grade supplies. This category is driven by major private label players who re-pack pickles in market-specific package sizes and add their own labels. It also includes food processors using pickled cucumbers and gherkins in ready-to-eat preparations and gourmet cuisines.

The third category of importers directly import straight-to-shelf pack sizes. They are primarily distributors and

have cold storage warehouses and in-house packing/labelling facilities for bulk sales to retailers or re-exporters.

For new suppliers, the challenge is to build lasting relationships with established importers, as they usually work with a select few suppliers. Regulations are in place to ensure a smooth flow of goods into European countries. Established importers may perform audits on quality and other aspects to ensure that safety protocols and strict contract terms are being followed. Due to current stiff competition for imports from developing countries, offering discounts and lower prices may be challenging for new exporters.

Local cucumber and gherkin brands have their own farms, legacy and branding and often have established relationships with retailers and end consumers. They also remove the need for middlemen, giving them a price advantage. This may put more pressure on new entrants.

## **What is the most interesting channel for you?**

For new suppliers, the most interesting channel depends on your specialisation. Product differentiation, cost-efficient supply and compliance with European regulations is key to building long-term relationships with importers and wholesalers in the region.

Specialised importers/wholesalers continue to be the most useful contact for marketing pickled cucumbers in Europe. Most importers are knowledgeable about the European market and closely watch developments in countries engaged in pickle production. This makes them well informed about market developments and able to provide practical advice about exports. Creative digital marketing initiatives can help new players attract brand-conscious importers and build a strong market position.

A strong social media presence is equally important as e-retailers such as Amazon and local European retailers have online platforms that are attracting a new set of consumers. This, coupled with creative digital marketing initiatives, will attract brand-conscious importers and help new players build a strong position.

As an end user of the cucumber and gherkin industry, the retail channel is becoming more powerful compared to the food service and food industry segments. Retailers have benefitted from private labels, which are no longer seen as low-quality, but fresh and natural. However, the segment is too demanding for new suppliers, as preferences keep changing. Nevertheless, by focusing on unique selling points, consumer demand and innovative launches in response to consumer trends, new players can carve out a niche for themselves.

### **Tips:**

- Identify your export market and do extra market research on private labelling for specific products.

- Learn about dietary preferences related to pickled cucumbers and gherkins in Europe.

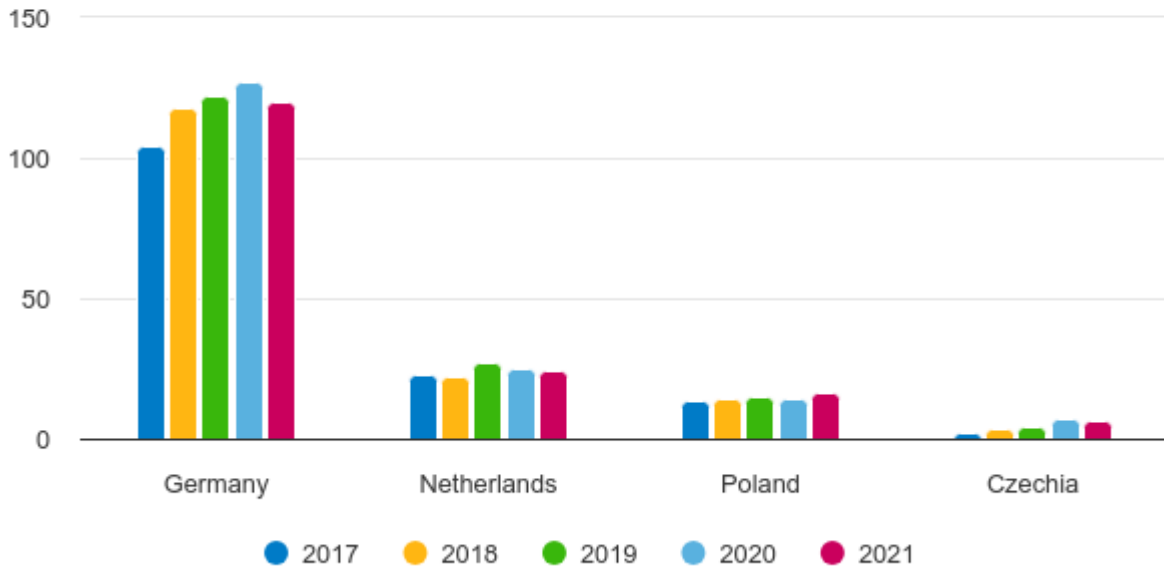
- Learn about fresh produce and pickled cucumber and gherkin traders in the region.

## **3. What competition do you face on the European pickled cucumber and gherkin market?**

### **Which countries are you competing with?**

Competition is high in European countries. Many import pickled cucumbers and gherkins for re-export. In Europe, Germany is the leading supplier of pickled cucumbers. Among developing countries, Turkey accounts for a major share, followed by India, Serbia and Egypt.

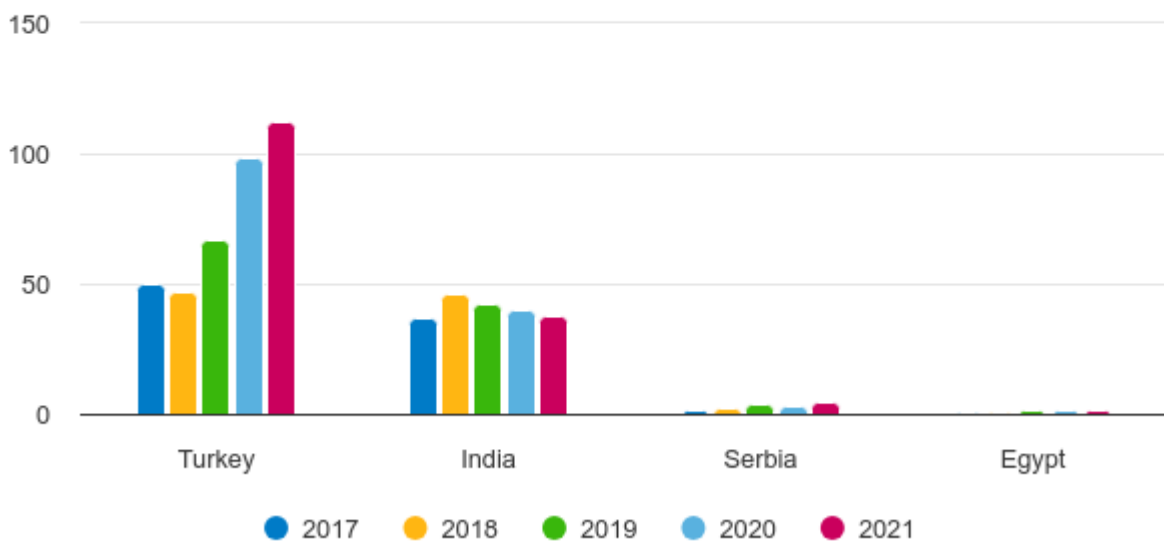
**Figure 5: Leading Intra-European suppliers of pickled cucumbers and gherkins (in tonnes)**



Eurostat

**Figure 6: Leading non-EU suppliers of pickled cucumbers and gherkins**

in tonnes



Eurostat

### Germany: leading supplier of pickled cucumbers and gherkins in Europe

Germany is the leading supplier of pickled cucumbers and gherkins, accounting for almost 33% of European imports. In the past five years, the country's export volume grew by 3.6% per year on average. According to the Observatory of Economic Complexity (OEC), it was the second-largest exporter of pickled cucumbers and gherkins globally in 2020. The Spreewald region in the state of Brandenburg (southeast of Berlin) is known for its pickles. Spreewald gherkins have a protected geographical indication (PGI) in the EU and are one of Brandenburg's biggest exports.

In 2021, exports from Germany to other European countries fell by 7 thousand tonnes compared to 2020. The Netherlands, France, Poland and Austria are the leading export destinations for German pickled cucumbers and gherkins. Primary export destinations outside Europe are Russia, China and the US.

## **The Netherlands: hub for re-exports**

The Netherlands is the fourth-largest supplier of pickled cucumbers in Europe (second-largest intra-European supplier). The Netherlands does not produce many cucumbers itself but is a major trade hub for imports from different parts of the world which it then re-exports (31% of total imports) to neighbouring countries. In the past five years, Dutch exports of pickled cucumbers and gherkins rose 2%, from 23 thousand tonnes in 2017 to 24.5 thousand tonnes in 2021. The leading export destination in 2021 was Germany (25%), followed by Belgium (11%), France (11%) and Poland (4%).

## **Poland: fifth-largest supplier**

Poland is the fifth-largest exporter of pickled cucumbers and gherkins in the world, after Germany, Turkey, India and the Netherlands. It is the third-largest intra-European supplier (after Germany and the Netherlands). Poland's exports account for 4% of all regional exports. Over the past five years, the country's exports to other European countries increased by more than 2,524 tonnes (4%), from 13.66 thousand tonnes in 2017 to 16.1 thousand tonnes in 2021. Leading export destinations were the UK (18%), Germany (15%) and Mongolia (11%).

## **Czech Republic: growing supplier in Europe**

The Czech Republic is the sixth-largest exporter of pickled cucumbers and gherkins in Europe (after Poland) and the fourth-largest intra-European supplier. Over the past five years, its exports to other European countries grew by more than 4,233 tonnes, or 30%, going from 2,283 tonnes in 2017 to 6,516 tonnes in 2021. Leading export destinations are the Slovak Republic (41%), Finland (32%) and Austria (20%).

## **Non-EU country suppliers**

Turkey is the largest non-EU exporter of pickled cucumbers to Europe. Turkish growers produce 100,000 tonnes of cucumbers and 75,000 tonnes of gherkins per year, of which 83% is exported to the EU. According to the [World Integrated Trade Solution \(WITS\)](#), Turkey exported 150 thousand tonnes of pickled cucumbers in 2021. Germany was the leading export destination (25%), followed by the Netherlands (23%) and the UK (6%). Other top export destinations are Ukraine, Bulgaria, Georgia and Israel.

India is one of the world's largest exporters of pickled cucumbers and gherkins. Domestic consumption is negligible and almost all production is exported. India's Agricultural and Processed Food Products Export Development Authority (APEDA) has taken measures to develop infrastructure, boost quality and promote processed gherkins in international markets and has implemented food safety management systems in processing plants. Nearly 15% of the world's gherkins are supplied by India, where many regions have ideal soils and temperatures. Gherkins are currently exported to more than 20 countries, with major destinations including the US, France, Germany, Australia, Spain, South Korea, Canada, Japan, Belgium, Russia, China, Sri Lanka and Israel. According to data from [APEDA](#), India exported 223 thousand tonnes of cucumbers and gherkins worldwide, valued at €196 million, in 2020-2021. Before 2001, processed gherkins were exported in bulk packing, but now they are exported ready-to-eat in jars. Gherkin exports from India largely fall into two categories:

a) Provisionally Preserved (preserved in vinegar/acetic acid and brine)

Gherkins exports in bulk (220 litres) are packed in food-grade drums (high-density polyethylene or HDPE). They are then repacked by importers into smaller, ready-to-eat consumer packs.

b) Preserved in Vinegar

Ready-to-eat gherkins are packed in smaller jars and cans. Farming and manufacturing processes have meticulous quality assurance systems. The whole value chain is organised to ensure food safety and production to customer specifications. The industry proactively maintains quality standards to meet importing countries'

requirements. The majority of processing plants have implemented quality systems such as HACCP, ISO or BRC.

Serbia has a highly developed vegetable processing industry and much of this capacity is also used to produce pickled cucumbers and gherkins. Serbian exports amounted to 6,247 tonnes in 2021, with major export destinations being Germany (46%), Montenegro (14%), Hungary (9%), Bosnia and Herzegovina (8%) and the Slovak Republic (6%). Exports to Europe amounted to 4,783 tonnes (around 1% of total European pickled cucumber exports). In the past five years, Serbia's export volumes to Europe rose 36%, from 1,397 tonnes in 2017 to 4,783 tonnes in 2021.

Egypt is one of the largest producers of cucumbers and gherkins in the world (more than India). It exports mainly to Gulf countries, with Europe accounting for 1,908 tonnes. In fact, Egypt supplies only 1% of European demand for pickled cucumbers, though these exports grew 32% in the past five years.

North Macedonia is an important supplier of pickled cucumbers and gherkins to Europe, with the largest share going to Germany.

## Which companies are you competing with?

The supply of pickled cucumbers and gherkins is very concentrated in Europe as big processing companies have production subsidiaries in multiple countries in the region.

### European companies

Germany is the leading supplier of pickled cucumbers and gherkins in Europe. The main German pickled cucumber suppliers include SpreewaldRabe, Kuehne, Hengstenberg, Hainich and Paulsen.

[SpreewaldRabe](#) is a family business in Lübbenau that has been making gherkins for more than 120 years and produces over 2,000 tonnes of cucumbers each year. The company offers a wide variety of pickled gherkins, including mustard, garlic and salted dill, as well as cucumber onion dips, etc. It also pickles a speciality gherkin from Brandenburg which has a PGI in the EU. It supplies B2B customers with private label products in various packaging sizes. Prices are 25% higher than for conventional gherkins thanks to their specialities and brand name.

[Kuehne](#) is another leading pickled cucumber and gherkin supplier in Europe, with an 18% share on the German pickled cucumber market. It was the first to launch pickled gherkins in Germany in 1903 and currently offers more than 20 different varieties. Recently, the company launched a line of organic vegan gherkins that are free from gluten, lactose, artificial colours, flavours and preservatives. Kuehne is working to make its production 100% CO2-neutral and use 100% recyclable packaging materials.

### Non-European companies

Indian and Turkish companies are the biggest non-European suppliers of pickled cucumbers. Indian pickle suppliers include [Reitzel India](#) and [Raj International](#). Turkish pickled cucumber suppliers include [Anatolian Pickles](#), [Cenkci Salamura](#) and [Kostur](#).

[Reitzel India](#) is a subsidiary of the Swiss Reitzel Group. Established in 2004, it has its own farms in India and exports worldwide from its production facility in Kunigal. The company has Clean Label Project certification and had its first fair-trade gherkin crop in 2019. In 2020, it started conducting organic trials for gherkins. The company has complete supply chain traceability, from seeds to final products.

[Anatolian Pickles](#) was founded in the 1890s and has a factory in the Bursa district, where it produces pickles with no preservatives or colorants. Its traditional fermentation method uses less salt. The company sources all of its pickles from contracted growers and farmers in Turkey. It offers a variety of packaging options including jars, daypacks, vacuum packages, PET jars, pails and barrels.

## Which products are you competing with?

Pickled cucumbers compete with other varieties of pickled vegetables such as onions, radishes, carrots, olives, cauliflowers, peppers, capers, cabbage and beetroot. These vegetables are typically pickled using similar processes and can be preserved with a variety of seasonings. Some are known for having many more nutritional benefits and probiotic and gut-health promoting qualities similar to pickled cucumbers.

### Tip:

Use the unique characteristics of pickled cucumbers and gherkins to position them against alternatives. For example: range of seasonings, vegetable mixtures, sustainable production and harvesting, no artificial preservatives and organic.

## 4. What are the prices for pickled cucumbers and gherkins on the European market?

The prices of pickled cucumbers and gherkins vary depending on the country of origin, production cost, grade and quality, retail chain brand, climatic factors and other global economic factors.

In Europe, bulk packages of good quality pickled cucumbers and gherkins are sold in high volumes at lower profit margins, and usually range from €0.35 to €0.80. Prices for premium organic pickled cucumbers and gherkins range from €4.25 to €8 per kg. These are indicative prices and vary by country of origin and other factors.

According to Hugo [Reitzel](#), a top supplier to the Netherlands, it pays Indian suppliers €1 per kg for gherkins and French suppliers €5-6 per kg.

Below are prices ranges for different pickle package sizes, based on Dutch wholesale price data.

Cucumbers and cornichons	\$1.10 / kg	10-100 kg
Cucumbers and cornichons	\$1.10 / kg	100-1,000 kg
Cucumbers	\$0.80 / kg	1000-10,000 kg
Cucumbers	\$526 per MT	above 10MT

Efficiency savings in operating, transportation or distribution costs can give suppliers a competitive advantage. Government support and partnerships can also boost productivity and reduce costs. Quality and origin influence price as well.

### Tip:

Subscribe to [IHS Markit](#), one of the most respected market information service providers for the food sector.

This study was carried out on behalf of CBI by [M-Brain](#).

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