

# The European market potential for pickled cucumbers and gherkins

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Europe represents one of the largest markets for pickles, especially fermented cucumbers, which is the highest retailing fermented vegetable in the region. This is primarily driven by an increase in health awareness in the general population, especially the younger generation. Pickles do more than add a crunchy, tangy bite to sandwiches and burgers. In terms of health benefits, they are loaded with antioxidants and minerals that protect against free radicals. Pickles not only add flavour to meals but are a cost-effective option across various cuisines. In particular, Germany, the Netherlands, France, Belgium and the Czech Republic offer opportunities for developing country suppliers.

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## 1. Product description

Fresh cucumbers are brined or fermented in vinegar and salt with various spices to give them a characteristic flavour. The term 'gherkin' generally refers to a savoury pickled cucumber, and belongs to the same species (*Cucumis sativus*), but different cultivar group. In France, they are called cornichons. Gherkins are usually pickled at 4-8 cm (1-3 inches) in length and stored in jars or cans with vinegar (often flavoured with herbs).

Their main nutritional values are:

- High in vitamins K, A, B9 and C
- Sodium-rich
- High in water and fibre

Gherkins are considered a healthy snack as they are low in calories. They are eaten as appetisers and in salads, sauces, hamburgers, rolls and sandwiches. Gherkins are marketed both whole and in slices and are generally available in two variants with a range of flavourings and seasonings:

- Pickled whole gherkins
- Pickled sliced gherkins

Figure 1: Pickled whole gherkins



Source: [Pixabay](#)

Figure 2: Pickled sliced gherkins



Source: [Pixabay](#)

Wherever this study refers to pickled cucumbers and gherkins, this includes the range of products specified in Table 1, unless otherwise stated.

Table 1: Pickled cucumbers and gherkins product group

HS Code	Description
200110	Cucumbers and gherkins, prepared or preserved in vinegar or acetic acid

## 2. What makes Europe an interesting market for pickled cucumbers and gherkins?

According to [Dataintelo](#), the global pickled cucumber market is projected to expand at a compound annual growth rate (CAGR) of 4.5% between 2022 and 2030. Factors such as increasing demand for healthy food products and preference for convenience foods worldwide will aid growth.

Europe has a long history of pickle consumption and each country has its own specialities. Germany is both the biggest consumer and supplier in the region.

In 2021, the value of imports in Europe totalled €334 million, with a volume of 360 thousand tonnes. In the past five years, the value and volume increased by 7.2% and 6%, respectively. Since cucumbers need a warm climate to grow, they are not cultivated on a large scale in Europe. In the period since COVID-19 there has been a global rise in vegetable prices, resulting in higher tariffs on imports. Local produce was also impacted by poor weather conditions in some parts of Europe.

Intra-European trade accounts for 54% of the total import volume, while 46% is from developing countries. Imports from the latter increased by 11% in volume over the past five years, to 166 thousand tonnes in 2021. Germany accounts for the highest share of this market (22%), followed by the Netherlands (17%) and France (10%).

### Tip:

See the CBI [Exporting to Europe Guide](#) to learn about exporting to Europe.

### 3. Which European countries offer the most opportunities for pickled cucumbers and gherkins?

As Europe's main importers of pickled cucumbers and gherkins, Germany and the Netherlands are interesting focus markets. Both are major trade hubs for re-exports of imported pickled cucumbers to other European countries. Germany is the largest consumer and a sizeable exporter of pickled cucumbers and gherkins. Other leading importers of pickled cucumbers in Europe are France, Belgium, the Czech Republic and Poland.

#### Germany: leader in pickled cucumbers and gherkins imports

Germany is famed for pickled vegetables. It is both the largest producer and importer of pickled cucumbers and gherkins in Europe. The aggregated import value was €74 million in 2021, representing 22% of total imports. In the past five years, German imports increased annually by 11% (in volume and value), reaching 75 thousand tonnes in 2021. Compared to the pre-pandemic period, import prices do not appear to have changed significantly.

The growing population and shift towards healthier lifestyles are driving demand for pickled cucumbers and gherkins. Around 6.9% of the population in Germany suffer from diabetes. Vegetables pickled in vinegar, when consumed in moderation, can help maintain haemoglobin and blood sugar levels and regulate diabetes. The perceived nutritional and health benefits of pickles in general have increased demand for good-quality, organic pickled vegetables in recent years.

The German import market is highly concentrated. Turkey, India and the Netherlands together account for 83% of its total imports.

In 2021, 76% of imports came from developing countries, of which 51% were from Turkey and 19% from India. Other developing country suppliers are Serbia, Egypt and Iran. Intra-European imports account for 24%, with the Netherlands (14%) and Poland (8%) being the leading suppliers, followed by Lithuania, Denmark and Austria.

Germany is also the largest exporter of pickled cucumbers and gherkins in Europe. It exported 120 thousand tonnes (€102 million) in 2021 (1.6 times its import volume). The largest export partners were Russia (15%) and the Netherlands (15%), followed by France (7%) and Poland (5%). The Netherlands acts as an entry point for imports in the region. As a result, Germany imports and exports to the country.

The name 'Spreewald gherkins' (German: *Spreewälder Gurken* or *Spreewaldgurken*) refers to a specialty of Brandenburg, Germany. These gherkins fall under an EU [protected geographical indication](#). Spreewald gherkins account for the highest exports from Brandenburg, Germany. [Rabe](#), a family business in Lübbenau, has been cultivating gherkins for more than 100 years. Their specialities include Rabe's dill pickles (made with sugar, vinegar and herbs including fennel and thyme), salty-sour pickle (lacto-fermented, pickled in brine with no sugar and vinegar) and mustard gherkins. Rabe recently launched new flavours including sweet chilli and curry.

Top suppliers of pickled cucumbers and gherkins on the German market are [Carl Kuehne](#), [Spreewaldrabe](#), [Hengstenberg](#), [Hainich](#), [Nowka](#) and [Paulsen](#). Products include barrel pickles, crunchy gherkins, crunchy smaller gherkins, cornichons, sandwich gherkins and burger gherkin slices with a variety of added herbs and flavours. Carl Kühne KG (GmbH & Co.), one of the leading pickle manufacturers, has continued launching new pickled gherkin varieties by changing flavour characteristics (mild, hot, herbal) and selling them in more attractive packaging.

#### Tips:

The German pickled cucumber and gherkin market is highly competitive due to large-scale production. Production costs are rising in Germany. Explore the potential of effective pricing to gain market share.

Explore possibilities for exporting niche market varieties of pickled cucumbers and gherkins such as organic, with unique seasonings and different flavours.

See the [Pickle Industry Directory](#) to learn more about international pickles associations and their members.

## The Netherlands: major hub and import leader

The Netherlands imports the largest quantity of pickled cucumbers and gherkins in Europe (more than Germany). It is an entry point for imports in Europe, which are then re-exported to other European countries. The Netherlands does not produce many cucumbers itself and relies on imports. In 2021, it was the second-largest importer in value (after Germany), at €58 million (78 thousand tonnes). In the past five years, Dutch imports grew significantly, by 7% in volume and 6% in value. Germany (49%) is the largest supplier to the Netherlands, followed by Turkey (41%) and India (4%). These three countries jointly account for 94% of total imports. Hungary (2%), Belgium (1%) and Poland (1%) are relatively smaller suppliers to the Netherlands.

The Netherlands ranks second in exports of pickled cucumbers, after Germany, with an export volume of 25 thousand tonnes in 2021. It is the fourth-largest exporter globally.

Some top brands in the Netherlands are [Kesbeke](#), [Kuehne](#), [Delhaize](#) and Jumbo.

[Crop Alliance](#) is an established Dutch company that grows, preserves, processes and exports silverskin onions, gherkins and other vegetables in a variety of shapes and sizes. The company specialises in vinegar and brine preservation. Another leading manufacturer is [N.W. van Ruiten B.V.](#), which has its own brand, NVR, and also produces a small variety of private labels for large buyers.

Some private label brands, such as [Van Der Kroon Food Products](#), offer customised private label pickled products to retail and wholesale/food service outlets, including customised packaging (size, shape, materials). Several family-owned businesses have long traditions of pickling the best cucumbers and selling them at farmers markets. Some have been in the business for more than 150 years and dominate the Dutch market with their secret recipes.

### Tip:

See the Dutch Chamber of Commerce's [basic checklist](#) for exporting to the Netherlands to learn more about the market.

## France: emerging European market for pickled cucumbers and gherkins

In France, pickled cucumbers go by the name of cornichons, which are made from mini gherkin cucumbers (2.5-5 cm (1-2 inches) in length and harvested before reaching full maturity for an extra-tart crunchiness). Cucumbers are mainly cultivated in Pays du Loire, Provence-Alpes Côte-d'Azur and Centre de France.

France is the third-largest importer of pickled cucumbers and gherkins in Europe. French import value totalled €32 million in 2021, constituting nearly 10% of total European imports. Germany (31%) is the leading supplier, followed by the Netherlands (23%), Belgium (7%) and Italy (2%). Among non-European countries, India is the leading supplier (16%), followed by Turkey (9%). The cost of producing cornichons is high in France, with only one harvest per year due to the cold climate. Market forces have led to a decrease in production and greater

reliance on imports from South Asia and Eastern Europe.

It has been [reported](#) that 80% of the 60 million jars of cornichons sold annually in France come from India and around 20% from Eastern Europe.

The French customarily eat pickles as a side dish or use them as an ingredient in traditional dishes. According to data from Statista, consumption of pickled cucumbers and gherkins is high in the country. In 2020, around 73% of French households used them as a side dish and 30% as an ingredient in dishes.

[Nutri-Score](#) labelling is used in France to indicate the nutritional value of products. One of the leading pickled cucumber and gherkin brands in France is [Groupe Reitzel](#).

## **Czech Republic: rising as an importer**

The Czech Republic is the fourth-largest importer in Europe (by volume). In 2021, the region imported 18 thousand tonnes of pickled cucumbers, mainly for domestic consumption. In the past five years, imports increased by 13% and 20% in volume and value, respectively. Intra-European imports accounted for 67%, with Germany (45%) and Slovakia (10%) jointly contributing 55% to total imports. Turkey (33%) is another leading supplier of pickled cucumbers and gherkins.

## **Belgium: stable importer**

Belgium is the fifth-largest importer by value of pickled cucumbers and gherkins in Europe. It accounts for 5% of total imports in the region. In 2021, the total value of imports added up to €16 million, or 14.2 thousand tonnes by volume. Over the past five years, the volume of pickled cucumber and gherkin imports decreased at a CAGR (compound annual growth rate) of 3.5%. Suppliers are mainly from the Netherlands and Germany, which together account for almost 86% of total imports. Non-European countries account for a very small share of imports (5%), with Turkey, Egypt and India being the main suppliers.

Major export partners for pickled cucumbers and gherkins are France (50%), the UK (26%) and South Africa (10%).

Devos&Lemmens [Belgian Pickles](#) is one of the leading manufacturers of pickled cucumbers and gherkins and sells under its own brand name.

## **4. Which trends offer opportunities or pose threats on the European pickled cucumber and gherkin market?**

### **Awareness of health benefits**

There is a growing awareness among Europeans about healthy living. This is especially true in the younger population and compared to other developed regions. Consequently, overall demand for healthy food and drinks has increased. Pickled cucumbers not only enhance the taste of food but are also a rich source of beta-carotene, an antioxidant that turns into vitamin A when consumed in limited quantities. Pickles are a [source](#) of vitamins and minerals including iron, potassium and calcium and contain probiotics that aid digestion. Some [athletes](#) claim pickle juice helps quickly replace lost electrolytes after exercise. According to the [INC](#), a recent survey by IRI International found that two-thirds (70%) of people across Europe buy healthy foods, especially those labelled 'free from', 'organic' and 'vegetarian'. Penetration levels of each category are already significant, with organic (53%) and vegetarian food (39%) accounting for the largest shares of food purchases by Europeans.

### **Sustainability**

Pickles are relatively sustainable. Cucumber and pickle production is not associated with significant damage to air, water, land or soil. Pickling in itself is a sustainable practice that helps reduce food waste and the greenhouse gas emissions that come with it. Pickled cucumber manufacturers are starting to produce and market more organic and GMO-free pickles to cater to health-conscious consumers. These products are made

without preservatives or other synthetic chemicals that could negatively impact health.

## Flavouring and packaging

Pickled products vary with local tastes and preferences. Manufacturers are introducing more new flavours to attract consumers. Leading companies also offer convenient and cost-effective packaging options for ease of use and on-the-go consumption. These new packaging variants range from PET jars and single-serve packs to pouches and containers with flexible, heat-sealable and peel-off lids.

## Pandemic

COVID-19 caused changes in consumption patterns across Europe. In general, the pickle market saw an uptrend with growing awareness of the health benefits of pickled foods. Their long shelf life also lessened the need to leave home during lockdowns. Online sales of pickled cucumbers and gherkins increased during the pandemic.

### Tips:

Consider certifying and labelling your products as organic. Check the requirements for organic food and farming under [Regulation \(EU\) 2018/848](#).

See the [International Trade Centre Standards Map](#) for a comparative analysis and review of voluntary standards.

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

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