Exporting edible nuts and dried fruits to Europe

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The European Union is the largest market for edible nuts in the world, representing more than 40% of the total world imports. Import volumes are steadily increasing. Large importing and consuming markets such as the Netherlands, Germany, France and the UK offer opportunities for exporters from developing countries. Natural, low-sugar and safe products are the main trends supporting the increasing consumption of edible nuts and dried fruit.

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1. Product description

Product definition

Edible nuts and dried fruit are two different groups of products which are usually traded by the same companies in international trade. The reason for this is their longer shelf life compared to fresh fruit and vegetables as well as similar storing and handling conditions. Edible nuts and dried fruit are also used in a similar way: as snacks or as culinary ingredients in bakery or confectionary products.

- A nut is a fruit composed of a hard shell and a seed, which is mostly edible. However, in a general context, a wide variety of dried seeds are also called nuts and include some seeds without a hard shell (e.g. pine nuts).
- Dried fruit is fruit from which the majority of the original water content has been removed. This is done either naturally, through sundrying, or through the use of specialised dryers or dehydrators.

This study covers general information regarding the market for edible nuts and dried fruits in Europe which is of interest to producers in developing countries. Please see Table 1 for an overview of the products and product codes covered in this study.

Table 1: Products in the product group of edible nuts and dried fruits

Combined Nomenclature Number	Product

0801 (and corresponding 8 digit codes)	Brazil nuts, desiccated coconuts, cashew nuts
0802 (and corresponding 8 digit codes)	Almonds, hazelnuts, walnuts, chestnuts, pistachios
0803 (and corresponding 8 digit codes)	Dried bananas and plantains
0804 (and corresponding 8 digit codes)	Fresh or dried figs, pineapples, avocados, guavas, mangoes and mangosteens
0805 (and corresponding 8 digit codes)	Dried oranges, clementines, monreales, satsumas, mandarins, wilkings, tangerines, tangelos, ortaniques, malaquinas, grapefruit, lemons, limes
0806 (and corresponding 8 digit codes)	Dried grapes
0813 (and corresponding 8 digit codes)	Other dried fruit and dried fruit mixtures

Picture 1: Mixture of dried fruit

Source: Pixabay

Picture 2: Dried fruit on the street market

Source: Pixabay

Picture 3: Mixed edible nuts

Source: Wikipedia

Picture 4: Dried fruit less commonly produced

Source: Wikipedia

Product specification

Quality

The general quality requirement for all dried fruit and nuts is that products should be of "sound, fair and marketable quality" and bear the full name of their country of origin. Fruit and vegetables that are not covered by a specific standard must meet the general standard – or the applicable UNECE standard. Operators are free to choose which standards they would use in their business practice.

The most common quality requirements for edible nuts and dried fruit are the following:

- moisture content (maximum level is defined for specific products);
- sizing (different for every type of dried fruit and nuts);
- specific cut (for certain types of dried fruit);
- level and types of used preservatives;
- quality class (defined by uniformity and tolerances).

For detailed good hygiene practices, please refer to the Codex Alimentarius Codes of Hygienic Practice for dried fruit, tree nuts and more specifically for groundnuts (peanuts).

Labelling

The following labelling is used in the trade of edible nuts and dried fruit:

- The name of the product should be declared, specifying whether the product is naturally dried or sugar is added (for specific types of dried fruit).
- Information about nuts should contain specification whether they are shelled or in shell.
- Regarding certain types of dried fruit which have seeds or pits, the label should declare the presence of seeds or pits.
- It is common that in addition to grading, specifications include the crop year and variety.

Information for non-retail containers has to be given either on the container or in accompanying documents. The container 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, 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, the product labelling must be in compliance with the European Union Regulation on food information to consumers. This regulation defines more clearly the nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information). This regulation came into effect on 13 December 2014, but the obligation to provide nutrition information will apply from 13 December 2016.

Picture 5: Shipping label example

Source: Integrated Business Communications Alliance

Picture 6: Example of allergen advice on the retail packaging

Source: QuickLabel Systems

Packaging

Packaging used for dried fruit and edible nuts must:

- protect the organoleptic and 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.

The safety of food contact materials must be evaluated and ensure that there is no migration of unsafe levels of chemical substances from the material to the food.

There is no general rule for export packaging, but dried fruit and shelled nuts are usually packed in carton boxes with plastic liner inside. Unshelled nuts that are intended for wholesale are typically packed in jute or plastic bags or in “polysacks”. They can also be packed in paperboard cartons or wooden boxes.

Within Europe, the standard bulk package is 10 kg, but 12-kg cartons, 12–15-kg plywood joint boxes and 25–70-kg linen fabric bags are also used. When packed in corrugated or millboard cartons, the product should be transported on pallets.

The selected packaging size should be such that the dimensions conform to the conventional pallet sizes (800 x 1,200 mm and 1,000 x 1,200 mm) and cargo units may thus be produced.

Retail packaging includes plastic bags, plastic containers or foil bags.

Picture 7: Cashew nuts export packaging

Picture 8: Dried mango export packaging

Tip:

- For more information about labelling and food contact materials, see our study of Buyer requirements for processed fruit and vegetables.

2. Which European markets offer opportunities for exporters of edible nuts and dried fruit?

The Netherlands, Germany, the United Kingdom and France offer opportunities for exporters of edible nuts and dried fruit. The United Kingdom is the largest European importer of edible nuts, while Germany is the largest European importer of dried fruit. In addition to these largest markets, opportunities can be found on the growing markets of Central Europe. The products with rising demand are almonds, brazil nuts, hazelnuts, macadamia nuts and dried prunes.

Imports

- The outlook for import of edible nuts and dried fruit within Europe is positive in the long term and it is expected that imports will continue to increase in the coming years.

- Since 2013, the total European imports of edible nuts and dried fruits have grown annually by 9% in value, reaching € 11.3 billion in 2017. Over the same period, imports have grown annually by 3% in quantity, reaching 2.9 million tonnes.
- It seems that in the long term, there will be difficulties to supply all demanded quantities of edible nuts and dried fruit, which drives the increasing value. Another reason for the slower growth in volume than in value, which is reflected in an increase of prices, is a general lack of products on the European market in recent years due to lower harvests in the main production regions.

- The European market for dried fruit and edible nuts is dispersed and there is no single country which dominates the import market. The United Kingdom is the largest importer of dried fruit (see our study of Dried fruits in the UK). Germany is the largest European importer of edible nuts.
- Central and Eastern European countries are expected to increase their imports of edible nuts and dried fruit more rapidly than western Europe.
- Within Europe, the countries with the highest import growth of edible nuts and dried fruit in value over the last five years were Romania (17%), Bulgaria (15%), Poland (12%), Luxembourg (14%) and the Netherlands (10%).
- Shelled almonds have the highest value of imports with a 23% share, followed by shelled cashew nuts (12%), shelled hazelnuts (12%) and shelled groundnuts (8%). Shelled cashew nuts had a specifically high average annual import growth rate of 26% in value over the last five years, indicating an increased demand for this product but also an increase of import prices.
- For suppliers from developing countries, good opportunities can be found in exports of cashew nuts, walnuts, brazil nuts, macadamia nuts and chestnuts. There is also an increasing demand for dried superfruit such as dried berries (e.g. cranberry, aronia, mulberry), dried physalis and powdered dried superfruit. The highest annual growth of import value over the last five years was in cashew nuts (26%), chestnuts (22%), brazil nuts (16%) and walnuts (13%).

- Around 35% of all European import value from countries outside Europe is from the United States (mainly almonds, walnuts and dried cranberries), followed by 14% of imports from Turkey (mainly hazelnuts, dried grapes and dried apricots).
- Among the top 30 European suppliers of edible nuts and dried fruit, the highest export growth over the last five years was recorded in Azerbaijan (annual growth of 40%; mainly hazelnuts), Vietnam (39%; mainly cashew nuts), Poland (27%; mainly dried apples and dried aronia), Egypt (21%; groundnuts), Belgium (16%; re-exports of almonds and pistachios) and Chile (14%; walnuts and prunes).
- Major intra-European imports involve both re-exports (e.g. peanuts from the Netherlands) and countries' own production (e.g. almonds in Spain).

Tips:

- Identify who are the largest importers of your product on selected large or fast-growing markets. You can start with an internet search or read more about supply chains in Europe in our study of Market channels and segments for edible nuts and dried fruit.
- Next to aiming at exports to the largest European importers, consider countries that are seeing a rapid growth in imports, such as Bulgaria, Romania and Poland.
- Learn from exporters in developing countries who are gaining in share on the European market, such as Azerbaijan, Vietnam and Egypt.

Exports

- In terms of value, European exports (including intra-European trade) of edible nuts and dried fruits since 2013 have grown annually by 9% and reached € 4.5 billion in 2017. In quantity, exports have grown by 5%

and reached over 1 million tonnes in the same period. The faster growth in value than in volume is influenced by the increase of prices in recent years (theoretically, it may also be caused by a shift towards more expensive nuts and dried fruit in the import mix).
- Around 90% of all European exports are intra-European exports.
- European exports mainly consist of re-exports of imported products. Even Spain, which is the largest European producer of almonds, re-exports significant quantities of almonds imported from the USA.
- Among the largest European exporters over the last five years, the highest export growth in value was in Germany (14%; mainly cashew nuts), the Netherlands (13%; mainly cashew nuts, groundnuts and almonds) and Italy (12%; mainly hazelnuts).

- The main external export destination in 2017 was Switzerland, followed by the United States, Norway and Algeria.
- Among the largest European export destinations, the highest increase of export from the European Union over the last five years was to the Republic of Korea (115% annual export growth; mainly almonds), the United States (18%; mainly chestnuts and cashew nuts) and Moldova (23%; mainly walnuts). Note that the Moldovan increase in import is influenced by the export of walnuts from France, which is outsourcing walnut shelling to this country.

Tips:

- Apart from targeting your export to the European Union, you can learn from European exporters and find opportunities on growing markets for edible nuts and dried fruit such as the Republic of Korea or the United States.
- Learn more about your competitors in our study of Competition in edible nuts and dried fruit.

Production

Note that the figures above display the production of manufactured goods, which include intermediate goods as well as final goods. This implies that it is possible that there is overlap in production data and import data, since raw materials may be imported and further processed.

- The production of edible nuts and dried fruits in Europe has gradually increased since 2013, reaching € 5.3 billion in 2017.
- The European Union produces more edible nuts than dried fruits. The most-produced edible nuts in Europe are hazelnuts and almonds, while the most-produced dried fruit are dried figs and prunes.
- Spain, the Netherlands, the United Kingdom and Italy are major producers of processed edible nuts and dried fruits. However, this includes processing such as mixing, roasting, coating and repacking of imported products. In terms of primary production (growing, harvesting and drying), the largest European producers are Spain (led by almonds), Italy (hazelnuts), France (prunes) and Greece (dried grapes).
- Spain is the third-largest producer of almonds and the fifth-largest producer of dried figs in the world. Italy is placed second in hazelnut production and sixth in dried figs. Greece is the fourth-largest producer of dried figs and the ninth-largest producer of dried grapes. France is the third-largest producer of prunes and the seventh-largest producer of walnuts. Portugal is an important producer of dried figs too. The Netherlands and the United Kingdom are large processors of imported nuts (the main one being peanuts).
- Imported nuts and dried fruits are widely used by the confectionery, baking and sweets industries for further processing.
- Some of the production (processing) country leaders are Intersnack (Netherlands), CG Hacking & Sons (UK), V. Besana (Italy), Borges (Spain), Bosch Boden Spies (Germany), Seeberger (Germany), Voicevale (UK) and Mariani Packing (USA-based, but spreading sales to Europe).

Tips:

- If you are producing almonds, hazelnuts, walnuts, dried grapes, prunes or dried figs, closely monitor the production of those products in Europe in the years with lower harvest, as more supply will come from external suppliers.
- The largest producing companies often complement their offer with imported dried fruit and edible nuts. They are therefore potential customers.

Consumption

The figure above displays the apparent consumption of edible nuts and dried fruit, calculated as the difference between external European imports, production and exports to external destinations. Some imported products are further processed before local consumption or re-exports, which means that there is a chance of double counting.

- In terms of value, the apparent consumption increased from € 4.8 billion in 2013 to more than € 11 billion in 2017. Although there is a high increase in consumption, this very high consumption value is the result of the high prices of imported cashew nuts.
- Stimulated by a continuous trend towards healthier lifestyles, it is expected that European consumers will increasingly appreciate edible nuts and dried fruits.
- Although Europe produces only 10% of the world production of tree nuts, it was the largest consumer with a 25% world consumption share in 2017. Almonds are the most-consumed nut in Europe, followed by walnuts and hazelnuts.
- Europe produces around 8% of the world production of dried fruit; however, similar to nuts, it is the world’s largest consumer of dried fruit with a 26% consumption share in 2017. Prunes and dried grapes are the dried fruits consumed the most in Europe.
- According to the International Nuts and Dried Fruit Council, the largest per capita consumption (including industrial consumption) of the most-consumed dried fruit and edible nuts in Europe is represented in the following table:

Table 2: Per capita consumption of the leading European countries in 2016

Dried fruit/edible nut	Leading Europeanconsumer per capita	Consumption per capita in kg
Almonds	Spain	1.57
Brazil nuts	United Kingdom	0.086
Cashew nuts	The Netherlands	1.015
Hazelnuts	Italy	1.31
Macadamia nuts	Germany	0.025
Pecan nuts	The Netherlands	0.245
Pine nuts	The Netherlands	0.091

Pistachios	Italy	0.19
Walnuts	France	0.33
Groundnuts	The United Kingdom	1.29
Dried dates	France	0.33
Dried apricots	Sweden	0.11
Dried figs	Greece	0.40
Dried grapes	The Netherlands	2.35
Prunes	France	0.46

Source: International Nut and Dried Fruit Council

Tips:

- In targeting your markets, distinguish countries that import edible nuts and dried fruits for their own consumption from countries that import products and re-export them to other countries. In the first category, more attention should be paid to developments in the retailing sector and local consumption trends.
- Learn more about production, consumption and trade statistics from the International Nut and Dried Fruit Council.

3. What trends offer opportunities on the European market for edible nuts and dried fruit?

These trends offer opportunities for exporters from developing countries:

- consumer demand in vegan, gluten-free and natural food;
- food safety certification supported with frequent laboratory tests;
- corporate social responsibility standards providing an additional great advantage for suppliers to European markets.

Consequences of the withdrawal of the United Kingdom from the European Union:

- On the short term, no significant changes are expected apart from the weaker currency. On the long term, the consumers in the United Kingdom will continue to consume dried fruits and nuts. It is also expected that the amount of direct imports, rather than through intermediaries, is likely to increase.
- With the weaker English pound, prices will be more expensive; on the other hand, the prices of sultanas, almonds and walnuts have dropped more than the rate of the pound towards the dollar, for example.

Specific trends for dried fruit and edible nuts:

- Low-sugar products are in demand on the European market. This trend is not very favourable for dried fruit,

as it contains higher concentrations of sugar compared to fresh fruit. However, it is not expected that this trend will significantly influence the consumption of naturally dried fruit. On the other hand, the consumption of sugar-infused or sugar-coated products such as candied dried fruit can be influenced by this trend.
- The consumption of superfruit is likely to increase, so the use of freeze-drying technology for berries is expected to increase too. In addition, individually dried product consumption of superfruit in powdered form is also likely to increase.

With respect to edible nuts and dried fruits, an extensive study of European market trends is already available. See our study of Trends for processed fruit and vegetables.

4. Which requirements should edible nuts and dried fruit comply with to be allowed on the European market?

Legal requirements

All foods including dried fruit and edible nuts 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, or excessive levels of mycotoxins or preservatives, are banned. It should also be readily obvious from the labelling whether food contains allergens.

Border control

In case of repeated non-compliance of specific products originating from particular countries, stricter border controls may apply. These stricter conditions in practice mean obligatory laboratory checks for a defined number of imported containers or trucks. Products from countries that have shown repeated non-compliance are put on a list included in the Annex to Regulation (EC) 669/2009.

Food safety

At the moment (July 2018), items on the list for increased control due to the presence of aflatoxins are groundnuts from Bolivia, Gambia, Madagascar, Senegal and Sudan; hazelnuts from Georgia and pistachios from the USA. There is also currently increased control for the presence of Ochratoxin A in dried grapes from Iran and dried apricots from Turkey. Next to mycotoxin control, there is increased sulphite control for imported dried apricots from Uzbekistan. New additions on the increased control list in 2018 are goji berries from China, which are controlled on the presence on pesticide residues.

With regard to dried fruits, the notifications remained broadly stable; a total of 121 notifications were registered in 2015 compared with 115 notifications registered in 2014. As in the case of edible nuts, aflatoxins were the main reason for notifying and reached a total of 47 notifications (39% of the total notifications for dried fruits), followed by sulphites with 33 notifications and Ochratoxin A with 19 notifications. Dried figs with 62 notifications and dried apricots with 33 notifications were the most-notified products.

During 2018, the European Commission published four new regulations (EU 2018/685, 686, 687 and 832) which together set the maximum residue levels for 12 pesticides.

Labelling requirements

In December 2014, new European labelling legislation went into effect. The new labelling legislation forbids the misleading of consumers. Moreover, claims that any food is preventing, treating or curing a human disease cannot be made.

Another change is allergen labelling, where allergens have to be highlighted in the list of ingredients and requirements for information on allergens will also cover non-prepacked foods, including those sold in restaurants and cafés. Allergens include all nuts as well as sulphur dioxide and sulphites at concentrations of more than 10 mg/kg in terms of the total SO_2.
Nutrition information is also mandatory for most products.

Common and niche requirements

- Food safety certification is a common request by European importers. The most common certification schemes accepted on the European markets are IFS, FSSC 22000 and BRC.
- Environmental protection, Organic and Fairtrade certification schemes are becoming more and more popular in Europe. For organic production, you can consider IFOAM standards.
- The European Union regulates organic food and drink produced and/or processed within Europe as well as organic goods from elsewhere (Commission Regulation (EC) No 1235/2008, with detailed rules concerning import of organic products from third countries).

Organic products can readily be exported to European countries from countries whose rules on organic production and control are equivalent to the EU's – currently Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, Tunisia, Switzerland and the United States. For all other non-European countries, importers can have their organic products certified for import into the European Union by independent private control bodies approved by the European Commission.

- As dried fruit and culinary nuts are common ingredient in Jewish cuisine, kosher certification is becoming more popular among importers.

Tips:

- In addition to the quality requirements mentioned in the product description, for a general overview of buyer requirements in the European, Union please refer to our study of Buyer requirement for processed fruit and vegetables.
- Specifically for edible nuts and dried fruit, consult the EU Trade Helpdesk, where you can find European Union legislation for your selected products under the corresponding codes.
- For information on commonly requested standards, check the International Trade Centre's Sustainability Map, an online tool which provides comprehensive information on over 210 voluntary sustainability standards and other similar initiatives covering issues such as food.
- Refer to the Codex Alimentarius Code of Hygienic Practice for Dried Fruits and Tree Nuts, the Code of Practice for the Prevention and Reduction of Ochratoxin A Contamination in Wine, or the Code of Practice for the Prevention and Reduction of Aflatoxin Contamination in Peanuts, Tree Nuts and Dried Figs. By following recommended good manufacturing practice schemes, you would fulfil the requirements for European food safety legislation.
- For the overview of independent certification programmes aimed at environmental protection and corporate social responsibility, you can refer to the supply chain of Mars or to the CSR webpage of Ferrero. Both companies are significant users of edible nuts and dried fruit on the European market. For example, Ferrero is the world's largest consumer of hazelnuts.

5. What competition do I face on the European edible nuts and dried fruit market?

For more information about competition on the European market for edible nuts and dried fruit, see our study of Competition.

6. Through which channels can you get edible nuts and dried fruit on the European market?

The specialised importer is the preferred channel for market entry in this sector. Many importers are also packers, and in addition conduct trading and wholesale activities. After the import, products reach different segments of the market, as described in Figure 7.

In some cases, exporters from developing countries can also supply to the different segments directly without the importer as an intermediary. However, this does not happen frequently.

Generally, more dried fruit is being repacked for the retail industry and more nuts end up in the food manufacturing industry. However, quantities in channels are different for specific products.

Figure 7: European market channels for dried fruit and edible nuts

Tips:

- Decide whether to sell to importer/traders or to importers/packers/manufacturers. The latter category may be willing to pay slightly higher prices and allows for building up a longterm relation.
- To get practical advice, read our tips for Doing business and Finding buyers on the European market for processed fruit and vegetables.
- If you are a new exporter to the European market, consider negotiating with specialised agents for dried fruit and edible nuts. Reliable specialised agents are present in many European countries, but the largest are situated in the Netherlands, the United Kingdom and Germany.

7. What are the end-market prices for edible nuts and dried fruit on the European market?

Indications of margins according to the final retail prices for edible nuts and dried fruit are not very precise, as the whole sector contains many different products. The prices are also different between producing countries regarding the type, fruit or nut variety and quality of products. As a result, exporters from developing countries can only have a very rough general overview of the price development.

Very roughly, it can be estimated that the Cost, Insurance and Freight (CIF) price represents around 25% to 50% of the retail price for a retail pack of dried fruit or edible nuts.

The best option to monitor prices is to compare your offer with the offer from the largest competitors.

A very rough breakdown of the prices is shown in the table below.

Table 3: Edible nuts and dried fruit price breakdown

Steps in export process	Type of price	Average share of the retail price
Production of fruit or edible nuts	Raw material price (farmers' price)	5% (in case fresh fruit is used as raw material for drying); 15-25% (if the product is already processed)

Handling, processing and selling bulk product	FOB or FCA price	30%
Shipment	CIF price	32-35%
Import, handling and processing	Wholesale price (value added tax included)	60%
Retail packing, handling and selling	Retail price (for average packaging of 250 g)	100%

Source: Market researcher compilation based on industry sources

Please note that the share of the retail price paid to farmers varies a lot between producing countries and the type of product. It will also vary from year to year depending on market conditions, as retailers tend to keep stable prices for final consumers even in common cases of fluctuating import prices.

If the farmers add value to their produce through differentiated quality, food safety, certification and processing steps, their price will furthermore be higher.
For example, Organic and Fairtrade certification, controlled drying, sun-drying, sorting or shelling may add value to the products.

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