

Exporting fresh berries to Europe

Last updated:
14 March 2018

Imports of fresh berries into the European market from developing countries have doubled over the past five years and are continuing to grow. Berries are increasingly offered as a convenient and healthy snack, seducing shoppers into buying them. Although many berries are grown in Europe, demand is much higher than European production. Imports from developing countries are filling the gap.

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1. Product definition

This fact sheet primarily concerns:

- Raspberries (*Rubus idaeus*)
- Blackberries (*Rubus*)
- Bilberries (*Vaccinium myrtillus*; European blueberries)
- Blueberries (*Vaccinium cyanococcus*, *Vaccinium corymbosum*).

Other berries dealt with in this fact sheet are:

- Currants (*Ribes nigrum*, *Ribes rubrum*)
- Gooseberries (*Ribes grossularia*)
- Cranberries (*Vaccinium oxycoccos*)
- Cowberries/foxberries (*Vaccinium vitis-idaea*)
- Mulberries (*Morus*)
- Logan berries (*Rubus* × *loganobaccus*).

Raspberries and blackberries are both members of the rose family and grow on perennial bushes. This also goes for blueberries. All berries are rather small and have soft skins; this makes them vulnerable in the total supply chain. Most berries are also produced in Europe, and are imported from other countries during the off-season. Cranberries are mainly imported from the United States and Canada, and are not among the most interesting products for exporters from developing countries.

Table 1: Combined Nomenclature (CN) commodity code for fresh berries

Number	Product
08102010	Fresh raspberries
08102090	Fresh blackberries, mulberries and loganberries
08103010	Fresh blackcurrants
08103030	Fresh redcurrants
08103090	Fresh white currants and gooseberries
08104010	Fresh cowberries, foxberries or mountain cranberries
08104030	Fresh fruit of species <i>Vaccinium myrtillus</i>
08104050	Fresh fruit of species <i>Vaccinium macrocarpum</i> and <i>Vaccinium corymbosum</i>
08104090	Fresh fruits of genus <i>Vaccinium</i> (excl. cowberries, foxberries or mountain cranberries, and of species <i>Vaccinium myrtillus</i> , <i>macrocarpum</i> and <i>corymbosum</i>)

Source: Eurostat Comext

Product specification

This section provides you with general information on requirements and trade standards regarding quality, size, packaging and labelling. For more specific information it is always recommended to contact your buyer. Additional information on marketing standards can be found on the [CBI market intelligence platform for fresh fruit and vegetables](#).

Quality

You can find information on different quality requirements in the [Codex Alimentarius](#), the 'food code' of the World Health Organization (WHO) and the Food and Agriculture Organization (FAO), and the [United Nations Economic Commission for Europe \(UNECE\)](#):

- Marketing standard for fresh [cape gooseberries](#) (Codex Alimentarius)
- Marketing standard for quick frozen (IQF) [raspberries](#), [blueberries](#), [bilberries](#) (Codex Alimentarius)
- Marketing standard for [berry fruit](#) in general (UNECE).

The [General Marketing Standards of Regulation \(EU\) 543/2011](#) also apply.

At the very least, berries have to be of a uniform colour, have similar varietal characteristics, be clean and free from extraneous vegetable material and be practically free from unripe berries.

Visual defects (for example unripe or damaged fruit) in a sample are evaluated according to the rating system in the Codex standard. As long as the amount of points does not exceed the threshold, the product is approved

(see the [Codex Alimentarius](#)).

Size and packaging

The package shall protect against risks such as contamination, leakage and dehydration. See also the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits and Vegetables \(CAC/RCP 44-1995\)](#).

Labelling

Consumer package labelling must comply with the rules and regulations that apply in the European market. Labels cannot contain any toxic ink or glue.

If the nature of the produce is not visible from the outside, the package must be labelled with the name of the product, the (optional) name of the variety and/or the commercial name.

The following items should be on the label of (pre-packed) fresh fruits:

- The name under which the product is sold
- The commercial identification: class, size (code), number of units, net weight
- The name and address of the producer
- The place/country of origin.

In case of frozen products, the term 'frozen' or 'solid frozen' has to appear on the label.

See the [Codex General Standard for the Labelling of Pre-Packaged Foods \(CODEX STAN 1-1985\)](#) or [Regulation \(EU\) No. 1169/2011](#) on the provision of food information to consumers, including labelling of pre-packaged food sold on the European market.

In the case of private label products, any certification logo or retailer logo should be on the label.

Listing ingredients is not mandatory for fresh fruit, unless a container is filled with several different products, in which case a list of ingredients and quantities of each product should be on the label.

For more information on labelling, packaging and quality, see also the standards mentioned above or read more about [food labelling in the Trade Helpdesk](#).

2. Which European markets offer opportunities for exporters of fresh berries?

General information and figures about production and trade developments in the European market for fresh fruit and vegetables is provided on the [CBI market intelligence platform](#). This section provides you with more detailed statistics about the trade and consumption of fresh berries in Europe.

Berry imports from developing countries are increasing

Total European imports of fresh berries in 2016 were nearly 80 thousand tonnes with a value of over 500 million euros. Around 76 thousand tonnes were imported from developing countries. Over the past five years, imports have more than doubled. [Blueberries](#) have the largest share in this development.

Import from overseas is especially strong during the off-season. Importers in the European market favour larger producers because of supply certainty.

Tip:

- Combine the produce from multiple production sources in order to deliver the quantity and quality required by importers.

Raspberries and blueberries are becoming more popular in Europe

- *Blackberries*: The European market for blackberries is very small compared to the United States, where sales volumes are ten times higher. Supplies of blackberries in winter, when there is no European produce on the market, are shipped in from Latin America (mostly from Mexico) by air.
- *Raspberries*: The European import of raspberries increased from 6.5 to 16.8 thousand tonnes between 2012 and 2016. Morocco supplies raspberries in December and January, whereas Poland, Serbia, Spain, the Netherlands and Belgium cover the rest of the year. Other suppliers include Mexico and South Africa.
- *Blueberries*: The European market for blueberries is expanding quickly (see Figure 2). France, the Netherlands, Poland and Germany produce American blueberries in summer. Additional supply comes mainly from Morocco, which is rapidly increasing blueberry production. Most long-distance and off-season supplies come from Chile and Peru. Other countries like South Africa, Ukraine, and many others are also rapidly increasing their export capacities.
- The American Blueberry is often confused or compared with the European Blueberry (bilberry). [exporting fresh blueberries to Europe](#).
- *Cranberries*: Canada and the United States are the principle suppliers of cranberries in the world. In Europe, cranberries are principally sold dried, frozen or in juice form and less often as a fresh product.

The United Kingdom and Germany are the principle markets for fresh berries

The United Kingdom and Germany maintain the highest total import of fresh berries, both over 50 thousand tonnes (see Figure 3). The United Kingdom leads in cranberries, while Germany imports more raspberries. The Netherlands is the third largest importer thanks to its position as a trade hub. Spain is an upcoming importer of fresh berries, both for the internal market and re-export.

According , the most promising markets for fresh berries are believed to be the United Kingdom, Germany, the Nordic countries and the Benelux countries (Belgium, the Netherlands and Luxembourg).

Tips:

- If you want to export to all countries in Europe, look for an import partner in Belgium or the Netherlands to manage the re-export process.
- Find a European importer by presenting yourself at trade fairs such as [Fruit Logistica](#) in Berlin and [Fruit Attraction](#) in Madrid. For berries, the [London Produce Show](#) can also be interesting.

Currants and raspberries are the most commonly produced berries in Europe

Different types of currants form a large part of Europe's berry production. The production of raspberries has picked up thanks to a growing demand. In general, berry production is relatively stable (see Figure 4). Europe produces berries for a large part of the year. Nevertheless, import is needed to guarantee the provision of fresh berries all year round.

Tip:

- Increase your chances on the European market by taking advantage of the off-season periods. Ask your (potential) buyer which months are suitable for supplying your berries. European winter months offer relatively high prices, which can be interesting for developing countries with counterseasonal production.

Poland is leading and increasing the production of berries

According to [FOASTAT](#), Poland is the leading producer of raspberries and currants in Europe, making it the principle berry-producing country in Europe. In Germany, currants and gooseberries are the most dominant berry crops and Italy produces a variety of berries including blackberries, raspberries and blueberries. In more recent years, Spain has gained the top position in blueberry production.

Exponential export growth in Spain

According to trade statistics, Spain has experienced exponential export growth. Similar to Poland, Spain characterises itself as a producing exporter. Portugal is also increasing its export through its own production.

The Netherlands achieve high export figures because of re-exported berries. This makes it a good starting point when you want to export to Europe. Advanced greenhouse technology also gives the Netherlands a good position for production during most of the year.

Tip:

- Check online news services such as [Freshplaza](#) about developments in the production and consumption of fresh berries, for example the [overview of the global market for berries](#) and those for [blueberries](#).

3. Which trends offer opportunities on the European market for fresh berries?

[CBI trend mapping](#) provides you with general trends in the European market for fresh fruits and vegetables. This section provides more details about specific trends in the market for fresh berries.

Cranberries during Christmas

Fresh cranberries tend to be eaten only at Christmas time and are often imported from the United States. The market for fresh cranberries is small compared to the market for cranberry juice, which is sold all year round. As a supplier from a developing country, it will be difficult to compete with the United States. To supply the European market you should not limit yourself to fresh cranberries.

Tip:

- Be creative and combine your fresh cranberries with, for example, frozen cranberries, pulp or juice. For fruit juice, see the information provided by the [European Fruit Juice Association](#) or [our studies about exporting fruit juice to Europe](#).

Blueberry production projects

Consumers show an increasing interest in berries and other fruit that offer an easy alternative to traditional fruits. Suppliers are attempting to profit from this trend, resulting in many new production projects. For example, the [orchards of blueberries in Peru](#) have increased from 280 hectares in 2012 to 3,200 hectares in 2016. The understanding of blueberry cultivars is increasing among buyers, who are starting to make their choices accordingly.

The demand for blueberries in Europe is much lower than in North America, but is expected to increase. However, it is uncertain if supply will surpass the strong demand in the next five years. Success will partially depend on the quality and consistency of the fresh berries, including maintaining an excellent taste.

Tips:

- Make sure that supply chain logistics and transport processes do not affect product taste in any significant way. Product taste is of crucial importance.
- Check the CBI study on [exporting fresh blueberries to Europe](#) for more specific information about the developments of blueberries in Europe.

Local seasons

Consumers are becoming more conscious about seasonal fruit and there is a growing preference for local fruit. Retailers have responded to this by emphasising and promoting locally produced berries. Although part of the berry demand is met by imports, the seasonal fruit trend can pose a risk to the further growth of imports from long-distance suppliers.

Convenience snack and ingredient

Berries are an excellent option as a snack fruit – they can be easily packed in various amounts or boxes, and they are increasingly sold as a snack, freshly sliced or in fruit mixes. Consumers like variety and berries can provide this. [Mixes of different berries](#) are attractive to consumers and are becoming more popular. [Snack packages](#) are especially popular in north-western Europe. As a convenience ingredient, berries can be dried (cranberries, mulberries) or frozen (raspberries, blueberries) for preservation.

Tip:

- Organise or produce a variety of fresh berries that complement each other. Having a complete assortment can become an advantage for clients that work with mixed fruit.

Consumers perceive berries as healthy. With a market trend towards more sustainable and healthy food, berries are able to capitalise on this trend and consequently European demand and sales are rising. For example, thanks to the promotion of health benefits over the past years, there has been a significant growth in sales of fresh blueberries, raspberries and (mostly dried) goji berries and mulberries. As mentioned earlier, cranberries are often used in juices. Although these berries are often available the whole year round, they tend to be relatively expensive products.

Organic niche

Thanks to the increased attention to health and the environment, there is also a growing interest in organically

produced fruit and vegetables. Organic berries are a growing niche and are sold by both specialised and mainstream retailers.

Tips:

- Find a specialised importer when working with organic certification. Use databases such as [Organic-bio](#).
- Read more about organic farming on the [Soil Association website](#).

Growing interest in sustainable fruit

Consumption of fresh fruit in Europe is developing towards a more sustainable approach regarding production and processing. Environmental and social issues are becoming more and more important. Social and environmental certification schemes include actions to strongly reduce and register the use of pesticides, increase employee safety and/or even include price guarantees for producers.

Certification schemes that are in line with the [Global Social Compliance Programme \(GSCP\)](#) will have a higher chance of being accepted by European supermarkets.

Tip:

- Check the [Global Social Compliance Programme \(GSCP\)](#) website for more information about social and environmental conduct.

Buyer requirements can be divided into (1) must-haves (requirements you must meet in order to enter the market), such as legal requirements; (2) common requirements (which are those most of your competitors have already implemented) – in other words, the ones you need to comply with in order to keep up with the market; and (3) niche market requirements, for specific segments.

The food safety requirements for fresh berries are the same as for other fresh fruit and vegetables. You can find a complete overview from the following resources:

- General [buyer requirements for fresh fruit and vegetables](#)
- [Trade Helpdesk](#), which provides an overview of export requirements for different berry varieties (product codes 081020, 081030, 081040) per country

4. With which legal and non-legal requirements must your product comply?

Minimise pesticide residues

Pesticide residues constitute a crucial issue for suppliers of fruits and vegetables. With the aim of avoiding health and environmental damage, the European Union has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed are withdrawn from the European market.

Note that buyers in several countries such as the United Kingdom, Germany, the Netherlands and Austria set MRLs that are stricter than those specified in European legislation.

Tips:

- Find out which MRLs are relevant for berries by consulting the European [MRL database](#) in which all harmonised MRLs can be found. You can search for your product or the pesticide used. The database shows the list of the MRLs associated with your product or pesticide.
- Reduce the amount of pesticides by applying [integrated pest management](#) (IPM) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.
- Read more about [MRLs in the EU Export Helpdesk](#). Check with your buyers if they have additional requirements regarding MRLs and pesticide use.

Comply with phytosanitary requirements

Fruit and vegetables exported to the European Union must comply with the European Union legislation on plant health. The European Commission has laid down [phytosanitary requirements](#) to prevent the introduction and spread of organisms harmful to plants and plant products in Europe. These requirements are managed by the competent food safety authorities in the importing and exporting countries.

Tip:

- Verify with the [national plant protection organisation](#) or food safety authority in your country if and under which conditions you may export fresh berries to Europe. These authorities normally work with international standards, but always check with your buyer as well.

5. Which additional requirements do buyers often have?

GlobalG.A.P. and other certification as guarantee

Since food safety is a top priority in all European food sectors, you can expect most buyers to request extra guarantees from you in the shape of certification.

The most commonly requested certification for fresh berries is [GLOBALG.A.P.](#), a pre-farm-gate standard that covers the entire agricultural production process, from before the plant is in the ground to the non-processed product (processing is not covered). GLOBALG.A.P. is almost always required, depending on the destination country, market conditions and market channel. For example, it has become nearly impossible to supply northern Europe without GLOBALG.A.P., since it is a standard requirement for most supermarkets.

Other food safety management systems that may be required are:

- [British Retail Consortium](#) (BRC)
- [International Featured Standards](#) - IFS Food (IFS Food Standard)
- [Food Safety System Certification SSC22000](#) (SSC22000)
- [Safe Quality Food Programme](#) (SQF).

These management systems are supplementary to GLOBALG.A.P. and are recognised by the [Global Food Safety Initiative](#) (GFSI).

Tips:

- Identify the food safety management systems that are usually requested in your target market. Expect GLOBALG.A.P. to be one of them.

- Read more about the various food safety management systems on the [Standards Map](#) website.
- Always remember that food safety is a major issue. Work proactively with buyers to improve food safety, taking care to be transparent and up-to-date with regard to buyer requirements and regulations.

6. What are the requirements for niche markets?

Growing demand for organic berries

An increasing number of European consumers prefer food products that are produced and processed using natural methods. The market for organic berries is relatively small, but with interesting prospects and currently a limited supply.

In order to market organic products in the European Union (EU), you must use organic production methods according to [European legislation](#) and apply for an organic certificate with an accredited certifier. Furthermore, you have to use these production methods for at least two years before you can market your fresh berries as organic.

Tips:

- Assess your market potential as an organic supplier before making any investments. Implementing organic production and becoming certified can be expensive.
- See the [CBI buyer requirements for fresh fruit and vegetables](#) for more details about organic produce as a requirement.

Fair and sustainable

There is growing attention for the social and/or environmental conditions in the producing areas. Most European buyers have a social code of conduct which they expect you to adhere to. For fresh berries, social compliance is important, although in day-to-day trade, product quality has top priority.

In the berry trade, it can be a plus to be [GRASP](#) certified. With regard to social certification, GRASP, which is part of GLOBALG.A.P., is the most accessible and gaining in importance.

A few specialised buyers offer an extra opportunity for certified [Fair for Life](#) label.

Tips:

- Examine your company's current performance, for example by completing a self-assessment on the [BSCI website](#).
- Consult the [Standards Map database](#) for additional information and to learn about differences between fair-trade labels.
- For a complete overview of buyer initiatives for social compliance, see the [Buyer requirements for fresh fruit and vegetables](#) on the CBI marketing intelligence platform.

7. What competition will you be facing on the European berry market?

For general information about market competition for fresh fruit and vegetables, you can have a look at the market competition information available on the CBI market intelligence platform. The platform also provides [tips for doing business with European buyers](#).

This section lists market entry opportunities and barriers regarding berries and describes the competition at company and product level.

Company competition

The worldwide production of berries is increasing and rivalry is generally very strong. During the European production season, most produce comes from northern and central Europe; the production of raspberries and blueberries is increasing in southern Europe as well.

The supply of berries from developing countries is also increasing, such as blueberries from Chile, Morocco and Peru and raspberries and blackberries from Morocco, Serbia and Mexico (air freight). Despite the competition, the European consumer market still offers growth potential.

Market entry

Certification and meeting both legal and non-legal requirements are major obstacles for producers and exporters entering the market. The buying power of large supermarkets is very strong and their requirements are very strict.

For berries, quality during harvest and shipping and corporate social responsibility (CSR) are increasingly important, as well as supply chain transparency and information sharing. European buyers desire long-term relationships to ensure product supply and quality.

Product competition

In the last decade, the diversity of fruit and vegetables supplied to the European market has increased. There are various types of berries that can be combined or substitute each other. The substitution of berries by other fruits is generally low.

Tips:

- Always check on trade partners' performance before entering into comprehensive or long-term contracts. Finding a sound importing partner, with a strong brand and good reputation, is very important.
- Try not to compete on price alone, but build partnerships with buyers and strive for excellent product quality and handling.
- Establish a credible track record, including transparent information on your company and product quality. Being part of a stable partnership and a trustworthy supplier can help you to establish and maintain your position in the market.
- Use storytelling (for instance, show the product's origin and producer), novel packaging and premium quality as methods for distinguishing your product.

8. Which trade channels can you use to put fresh berries on the

European market?

This section provides information in brief about the various marketing channels through which fresh berries are marketed in Europe.

Supermarkets have become a common trade channel for berries

Nowadays, berries are regularly found in many supermarkets. The supermarket segment is especially strong in northern Europe, where the potential for berries is considered to be the highest. In southern Europe, street markets and specialist stores have a higher market share, although large hypermarkets stocking berries are also popular in countries such as France and Spain.

Importers and wholesalers are important for distribution and brands

The importer plays a very important role in the trade channel in terms of both the retail and food service. Importers also supply domestic and exporting wholesalers. Nowadays, importers and wholesalers tend to also develop their own brands. These brands are meant to appeal to consumers or wholesale and food service customers. When it comes to berries, healthiness, attractiveness in appearance and the variety of the produce are often key to the brands. In addition, consumer perception of the producer's passion for supplying a quality product is often used as a marketing tool.

Importers and distributors differ in their relationship with the retail sector. Some are suppliers for private label products, others have their own brand, while yet others market the brand of a producer (cooperation).

Tips:

- Choose an importer based on the size of your company and strategy. Determine if branding can provide added value for your product.
- Find your trade partner at trade fairs such as [Fruit Logistica](#).
- Become part of a dedicated supply chain for branded berries. Companies with their own brands are bound to have conducted extensive market research and have invested in developing their market.

9. What are end-market prices for fresh berries?

NB: Shipping costs also depend on the country of origin

Prices fluctuate during the year, with low prices during the European harvest season (summer) and high prices during winter, especially around Christmas time.

Consumer prices depend on the specific variety, the size of packaging, the origin (local or non-local) and whether the product is organically produced or not. Consumer prices for berries vary significantly between countries and throughout the year. An indication of consumer prices is given below.

- Blueberries may be sold in supermarkets for €13–20 per kilo, but small snack sizes (90–120 grams) are sometimes sold at even higher rates.
- Blackberries are similarly priced as blueberries, although local produce may be sold for 50% lower prices.
- Raspberries retail for around €18–23 euros per kilo. Locally produced raspberries can be sold for as low as €12, while organic raspberries can go for up to €28 per kilo.
- Cranberries are usually sold dried for around €10–20 per kilo.

With the worldwide increasing production of blueberries, trading prices in 2017 have come under greater pressure.

Tips:

- Check retail prices through the online shops or ranges of supermarket chains such as [Tesco](#), [Albert Heijn](#) and [Carrefour](#).
- Find information about current fresh fruit prices on the French wholesale market Rungis at the [France Agrimer website](#) (in French).

Please review our [market information disclaimer](#).