

# Exporting jams and jellies to Europe

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Europe is the largest market for jams, jellies, purées and marmalades in the world, representing around 50% of the total world imports. Nut purées such as hazelnut paste and chestnut purée are experiencing an increasing demand. The demand for berry fruit preparations and some tropical products such as mango purée is also increasing. Opportunities can also be found in supplying purées to producers of infant foods, especially in the organic segment.

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## 1. Product description

### Product definition

Jams, jellies, purées and marmalades are fruit products obtained by the process of cooking fruit with or without the addition of sweeteners or gelling agents.

Other common terms for such products are “fruit preserves” or “fruit spreads”.

- Jam is made by cooking the whole fruit, pieces of fruit, fruit pulp or fruit purée.
- Jelly is made from fruit juice, usually with added sweeteners.
- Marmalade is prepared by cooking citrus fruit to obtain a gelled consistency.
- Purée is the edible part of the whole fruit, if appropriate, less the peel, skin and seeds pips, which has been reduced to a purée by sieving or other processes.

The most common sweetener used is sugar, but honey, concentrated juice and other sweeteners may also be used. The most common gelling agent used in the production is pectin.

Purées can be used as final products (very frequently as infant foods) but also as a raw material for the production of jams and marmalades and other applications. In international trade, it is also very common that purées are traded as concentrates. Other raw materials used are fresh and frozen fruit.

This study covers general information regarding the market for jams, jellies, purées and marmalades in Europe which is of interest to producers in developing countries. Please see Table 1 for the products and their product codes.

Table 1: Products in the product group of jams, jellies, purées and marmalades

Combined Nomenclature Number	Product
200710	Homogenized preparations of fruits/nuts, obtained by cooking, whether/ not containing added sugar/other sweetening matter
200791	Citrus fruit preparations (excl. homogenized), obtained by cooking, whether/not containing added sugar/other sweetening matter
200799	Fruit Preparations (excl. citrus fruits; excl. homogenized), obtained by cooking, whether/not containing added sugar or sweetening

### Tip:

- For market information on the raw materials used in the production of jams, jellies, purées and marmalades, refer to our studies of [frozen fruit and vegetables](#), [frozen berries](#), [frozen strawberries](#) and [fruit juices](#).

## Product specification

### Quality

The basic quality of jams, jellies, purées and marmalades is defined by the following:

- fruit content (higher fruit content means higher quality);
- content of permitted additional ingredients (e.g. sweeteners, pectin, fruit juice, essential oils);
- consistency (homogenised, with fruit pieces, with seeds or 'seedless').

An additional quality requirement requested for the raw materials in the production of final products is the Brix level (the sugar content of an aqueous solution). It is common that pulps and purées used as raw materials have high Brix levels, stable colour, aseptic packing and usually no added sugar.

### Tips:

- For quality requirements for specific products, refer to the European Union [Directive on fruit jams, jellies and marmalades and sweetened chestnut purée](#).
- For additional requirements such as a sampling plan, refer to the Codex Alimentarius Standard for

## Labelling

The following labelling is used in the trade of jams, jellies and marmalades.

- Type of product: “jam”, “jelly”, “jelly marmalade”, “sweetened chestnut purée”, and so on. Products with higher fruit content can be marketed with labels such as extra jam, high-fruit jam or extra jelly. However, the Member States of the European Union are allowed to define specific product definitions. For example, in some local markets, the term “marmalade” is used instead of “jam”. So it is possible to market products as “marmalade” instead of “jam” and “citrus marmalade” instead of “marmalade”.
- Fruit composition: an indication of the fruit or fruits used, in descending order of weight. However, for products manufactured from three or more fruits, the term “mixed fruit” or similar wording is allowed.
- The fruit content: indicated by including the words “prepared “with ... g of fruit per 100 g”.
- The total sugar content: indicated by the words “total sugar content ... g per 100 g”.
- Where the content of sulphur dioxide is more than 10 mg/kg, its presence must be indicated in the list of ingredients and highlighted.

Information for non-retail packaging has to be given either on the packaging or in accompanying documents. Non-retail packaging 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).

- Low-sugar products include dietetic jams and marmalades which are suitable for diabetics, where the refined sugar component is replaced with fructose and/or other sugar substitutes and sweeteners. However, keep in mind that labelling and composition of [food for diabetics](#) may differ among the Member States of the European Union. For example, in Germany, the term “dietetic” has been dropped for all food stuffs from October 2012 in accordance with the latest German Regulations on Dietetic Foodstuffs.

## Packaging

Although consumer products are mainly sold in glass jars, bulk products are usually packed in drums, bags or even truck tankers in case of purées.

### Tip:

- For more information about labelling and food contact materials, see our study of [Buyers requirements for processed fruit and vegetables](#).

## 2. Which European markets offer opportunities for exporters of jams, jellies, purées and marmalades?

France, Germany, the United Kingdom and the Netherlands offer opportunities for exporters of jams, jellies, purées and marmalades from developing countries. Major market opportunities can also be found on growing markets such as in the Scandinavian and Baltic countries. Products with a rising demand are chestnut purée, hazelnut paste, berry jams and tropical fruit preparations such as mango purée.

### Imports

#### ***Increased direct sourcing from developing countries***

- The European market for jams, jellies, purées and marmalades is expected to increase in the long term. Apart from the largest import countries such as France, Germany and the United Kingdom, opportunities can be found on rising markets such as in the Scandinavian and Baltic countries.
- The expected market growth will be driven by the healthier living trend, by developments in the food processing industry as well as by the increase in income in Central and Eastern European countries.
- The total European imports of jams, jellies, purées and marmalades increased over the last five years. The annual import growth rate was 6% in quantity and 7% in value. In 2017, the import value of jams, jellies, purées and marmalades reached € 1.3 billion or 699,000 tonnes.
- The growth rate of imports from developing countries was higher than from European countries.

#### **Highest import growth in Poland and Denmark**

- The European market for jams, jellies, purées and marmalades is fragmented and there is no single country dominating the import market. However, Germany, France and the Netherlands were the largest importers of jams, jellies, purées and marmalades in 2017. The main supplier to Germany was Austria, while the main supplier to France was Italy.
- Central and Eastern European countries are expected to show a strong increase in their imports of jams, jellies, purées and marmalades compared to western Europe in the coming years.
- Within Europe, the countries with double-digit growth of annual imports in volume over the last five years were Poland (16%), Denmark (16%), the Netherlands (15%), Spain (14%), Romania (12%) and Portugal (10%).
- The largest import share in this product group is jams and marmalades with a sugar content above 30%. Product groups with the largest annual increase in imports are homogenised preparations with a sugar content above 13%. This trend is supported by the increasing demand for baby purées or similar food for dietetic purposes packed in small containers and mostly produced for branded or private-label European suppliers. There is an increasing share of organic products in this subcategory.
- The largest European importer of jams, jellies, purées and marmalades from developing countries is the Netherlands, with Turkey as a main partner from a developing country. The Netherlands is followed by Germany and France, both of which also have Turkey as a leading supplier from a developing country.

#### **Berry fruit and tropical fruit preparations in high demand**

- The leading supplier of jams, jellies, purées and marmalades from a developing country is Turkey (mostly hazelnut paste), followed by Serbia (plum paste), Costa Rica (tropical jams and purées) and Mexico (mango paste and other purees).
- Among the top 20 suppliers from developing countries, the most significant annual growth in the exports of jams, jellies, purées and marmalades to Europe over the last five years was from Mali (60%), Guatemala (57%), Costa Rica (52%) and Moldova (32%).
- For suppliers from developing countries, opportunities can be found in the export of fruit preparations made from berry fruit and in the export of tropical fruit products with high Brix concentrations.
- There is also an increasing demand for hazelnut paste and chestnut purée on the European market, but the majority of suppliers from developing countries (except Turkey) currently do not have enough capacity to

supply those products. Therefore, investment in hazelnut and chestnut production can provide new opportunities in the long term.

## Forecasts

- The United Kingdom's possible withdrawal from the European Union (the so-called Brexit) can have various consequences for trade forecasts of jams, jellies, purées and marmalades. However, it is generally forecast that the market for processed fruit and vegetables will not change significantly.

## Specific products forecasts

- Jams and preserves are expected to remain breakfast staples as well as common cooking and baking ingredients in the long term. The greatest growth in this category is projected for Belgium, France, Norway and Spain, while sales are projected to decline in the Netherlands and Greece over the coming years.
- Spread products that emphasise provenance and authenticity are predicted to remain popular premium items for higher-income consumers.

### Tips:

- Identify who are the largest importers of your product on selected large or fast-growing markets.
- Apart from aiming to export to the largest European importers, consider countries that are seeing growth in imports such as Scandinavian, Baltic and Eastern European countries.
- Learn from exporters in developing countries who are increasing their share of the European market, such as Turkey, Mexico, India and Serbia. The information about jams, jellies, marmalades, purées and export strategies of fast-growing countries can be found on the websites of their sectoral associations, as well as on main market information portals such as [IEGVu](#). Some examples are the [Turkish Hazelnut Promotion Group](#) or the [All India Food Processors Association](#).
- Consider exporting jams, jellies, purées and marmalades which are not produced in Europe, such as tropical/exotic fruit products.

## Exports

### European export is increasing

- The largest European exporters can be potential competitors to suppliers from developing countries. However the majority of exports from European countries are products made using regional fruit such as apricots, plums, rosehips or strawberries, which are usually sourced within Europe. Suppliers from developing countries can find their opportunities in supplying bulk products which are not produced within Europe.
- In terms of value, the European exports of jams, jellies, purées and marmalades have grown by an annual rate of 5% since 2013 and reached € 1.65 billion in 2017. In quantity, the exports have grown by 4% annually and reached 832,000 tonnes in the same period.
- More than 70% of all European exports of jams, jellies, purées and marmalades are intra-European exports.
- No single country dominates the European export of jams, jellies, purées and marmalades. In 2017, Italy was the main exporting country, with Germany and France as top destination for Italian products. As the second-largest exporter, Spain shipped more than 116,000 tonnes, with France and Germany as its principal destinations.

### Strong increase in European exports to China

- Among the largest European exporters over the last five years, the highest annual export growth in terms of

quantity was found in Spain (10%) and Austria (22%).

- The main external export destination in 2017 was the United States, followed by the Russian Federation, Switzerland and Japan.
- Among the primary European export destinations, the strongest increase of exports from the European Union over the last five years was to China (26% annual growth), followed by Taipei (22%) and the Republic of Korea (18%).

### Tips:

- Apart from targeting your export to the European Union, you can learn from European exporters and their target markets within Europe, such as France and Germany. You can also find opportunities on growing global markets for jams, jellies, purées and marmalades, such as China and Saudi Arabia.

## Production

- The production of jams, jellies, purées and marmalades in Europe has gradually increased since 2013. The highest annual growth in production over the last five years was reported in Denmark (11%) and Ireland (7%).
- The largest producer of citrus jams and marmalades is the United Kingdom, while the largest producer of other types of jams, purées and marmalades is France, far ahead of Germany – which is the second producer in Europe.
- Top European producers include [Andros](#), [Hero Group](#), [St Dalfour](#), [Hain Celestial](#), [Helios](#), [Göbber](#), [Zentis](#) and [Zuegg](#).

Note that the figures above are for 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.

### Tips:

- Consider the industry for jams, marmalades and jellies as an important import segment for raw materials such as frozen fruit, fruit purées and concentrated fruit juices.
- Check the website of [PROFEL](#), the European Association of Fruit and Vegetable Processing Industries, for information about ongoing issues on the European market for processed fruit and vegetables. The website provides links to the websites of the national member associations.

## Consumption

### France the largest consumer of jams

- In terms of value, the apparent consumption of jams, jellies, purées and marmalades has increased by an average annual growth rate of 2%. The consumption increased from € 3.4 billion in 2013 to € 3.6 billion in 2017.
- Fruit spreads are more attractive to older European consumers than to younger ones.
- The largest consumption of jams, jellies, purées and marmalades within Europe is in France, representing more than 30% of the total European consumption. Other significant consuming countries are Germany, the United Kingdom, Italy and Spain.

## Jams favourite breakfast spread

- The most popular flavours of jams, jellies, purées and marmalades in Europe include strawberry, hazelnut, apricot, orange, raspberry, cherry and fig.
- The consumption of fruit spreads plays an important role in many European countries where people view breakfast as the most important meal of the day.
- The main drivers influencing the increasing consumption of jams, jellies, purées and marmalades are the increasingly positive image of healthy vegetarian breakfast alternatives. In addition, the current fast-paced lifestyle and growing preference for convenience food positively influence the consumption of fruit spreads.

### Tips:

- In targeting your markets, make a distinction between production countries that import jams, jellies, purées and marmalades as raw materials on the one hand and consuming countries which import for their own consumption on the other. In the second category, more attention should be paid to developments in the retail sector and local consumption trends.
- In addition to targeting suppliers in the retail segment, consider exporting to industrial suppliers such as the bakery, confectionary and baby food industries.
- One of the largest consumers is the bakery and confectionary industry. This industry regularly invests in research and development of different fruit preparations in order to meet the industry demand for fruit preparations and fruit fillings which are stable at room temperature and which can be used in convenient new products. If targeting this segment, cooperate closely with your target companies and offer your technological solutions.
- High-fruit, low-sugar and organic fruit spreads are gaining popularity in Europe. Consider offering those types of products to selected import markets such as France or the Baltic countries.

## 3. Which trends offer opportunities on the European market for jams, jellies, purées and marmalades?

The consumer demand for vegan, gluten-free and natural food offers opportunities for exporters from developing countries. Food safety certification supported with frequent laboratory tests and joined with corporate social responsibility (CSR) standards can also be a great advantage for suppliers to the European markets.

Specific trends for jams, jellies, purées and marmalades include the following.

- Low-sugar products are in demand on the European market. This trend also affects the market for jams, jellies, purées and marmalades, and consumers are increasingly searching for 100% fruit products, “low-sugar” and “low-calorie” fruit spreads.
- The consumption of superfruit is likely to increase, so the consumption of berry fruit spreads without added sugar is expected to increase too.
- In addition to low sugar, the most frequent labels for other categories of fruit spreads in retail packaging are “organic”, “no additives/preservatives”, “low/no/reduced allergens” and “gluten-free”.
- Glass containers are a very popular choice and the trend is clearly moving towards smaller sizes that cater for consumer needs such as due to smaller households.
- Locally sourced produce is still very much a trend and this also applies to the fruit jam market. Products that offer added value for the consumer are also becoming increasingly important. Examples of these products include fruit spreads with a particularly high fruit content and finely sieved cream spreads that contain no seeds or pieces of fruit.

With respect to jams, jellies, purées and marmalades, an extensive study of European market trends is already

available. See our study entitled [CBI Trends: Processed Fruit and Vegetables](#) in Europe.

## **4. Which requirements should jams, jellies, purées and marmalades comply with to be allowed on the European market?**

### **Legal requirements**

All foods including jams, jellies, purées and marmalades 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 preservatives, are banned. It should also be readily obvious from the labelling if a food contains allergens. Cans and other materials used for packaging must be corrosion-resistant and free from contaminants such as cadmium or Bisphenol-A (BPA).

The [EU Directive on fruit jams, jellies and marmalades and sweetened chestnut purée](#) more specifically defines the composition of these products.

### **Food safety**

In case of repeated non-compliance regarding specific products from particular countries, stricter conditions 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](#).

At the moment (March 2016), there are no jams, jellies, purées and marmalades on the list for increased checks.

During 2015 and 2016, the Rapid Alert System for Food and Feed reported few alert notifications for jams, jellies, purées and marmalades. The most frequent problems were excessive levels of sulphite, undeclared food colouring, and glass fragments in jams and marmalades. These notifications constitute only the tip of the iceberg, since many rejections and other food safety issues are handled directly by the trade, without the government intervening.

### **Packaging requirements**

Packaging used for jams, jellies and marmalades must:

- protect the taste, flavour, colour and other quality characteristics of the product;
- protect the product from bacteriological and other contamination (including contamination from the packaging material itself);
- not pass on any odour, taste, colour or other foreign characteristics to the product.

The safety of food contact materials must be evaluated and it must be ensured that there is no migration of unsafe levels of chemical substances from the material to the food. In Europe, the use of Bisphenol-A as inside lining material is banned in baby bottles. This is especially relevant for producers of fruit and vegetable purées, which are common types of baby food.

### **Labelling requirements**

In December 2014, [EU Regulation 1169/2011](#) went into effect. The new labelling legislation forbids the misleading of consumers. Moreover, claims that a food prevents, treats or cures a human disease may not be made.

Another change is allergen labelling, where allergens have to be highlighted in the list of ingredients. Information on allergens must now also cover non-prepacked foods, including those sold in restaurants and cafés. Allergens include all nuts, sulphur dioxide and sulphites in concentrations of more than 10 mg/kg in terms of the total SO<sub>2</sub>.



Nutrition information is also mandatory.

## Common and niche requirements

- Food safety certification is often requested 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. In order to be labelled within the European Union with the [EU organic logo](#), producers from developing countries must fulfil European [requirements for organic farming](#).
- 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 imports of organic products from third countries](#)).

Organic products can readily be imported from non-European 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.

### 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 requirements for processed fruit and vegetables](#)
- Specifically for jams, jellies, purées and marmalades, 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 for the practical [Code of Hygienic Practice for Canned Fruit and Vegetable Products](#).
- For an overview of independent certification programmes aimed at environmental protection and corporate social responsibility, you can refer to the [Sustainability report of Zentis](#).

## 5. What competition will I face on the European market for jams, jellies, purées and marmalades?

Regarding international trade, the major competitors are the companies which are major suppliers to Europe, as described in the previous sections of this report.

However, companies from different countries do not have the same starting competitive position regarding applicable tariffs for the trade in jams, jellies, purées and marmalades on the European market. For example, jams and jellies from the United States and Brazil are subject to an ad valorem tariff of 24.0%, in addition to € 4.20 per 100 kilograms of produce. For Mexico and India, an ad valorem tariff of 20.4% applies to the same products, in addition to € 4.20 per 100 kilograms of produce. The same products from Zimbabwe or Jordan have no such applicable tariff.

Regarding product competition, the main competitors are other types of sweet spreads such as chocolate spreads or honey, as well as general breakfast meals. Although the sales of jams are expected to increase, the forecasts for chocolate spreads and honey are even more positive. For example, the sales of peanut butter in the United Kingdom increased by 25% while jam sales were stagnant over the last four years. Around 7.7% of

consumers have switched from jam to peanut butter.

Regarding breakfast meals, younger generations are increasingly turning to cereal, cereal bars and breakfast options outside of the home due to the convenience that they offer. The sales of bread, the core accompaniment for sweet spreads, are also expected to continue declining.

## **6. Through which channels can you get jams, jellies, purées and marmalades on the European market?**

Specialised fruit processors are the preferred channel for market entry in this sector. However, many fruit processors are also packers, and in addition conduct trading and wholesale activities. After importing, products reach different segments of the market, as described in Figure 7.

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

Compared to other sectors of processed fruit and vegetables, in this sector, activities from developing countries are more intensive in the production and export of raw materials. Although jams, jellies and marmalades can also serve as raw materials, suppliers of bulk packaging from developing countries are much more frequently seen as suppliers of frozen fruit, purées, concentrated purées and concentrated fruit juices for the fruit processing industry in Europe.

Apart from fruit spread manufacturing, the main user of jams, jellies, purées and marmalades is the food processing industry in Europe.

- Products are used in the confectionary industry to produce fillings for fruit snacks and bars, as well as in the baby food industry segment.
- Products are also used in significant amounts within the dairy industry, in the first place for ice creams as well as in yogurts and other dairy bases.
- Another large consumer is the bakery industry, which uses jams, marmalades, jellies and similar fruit preparations as fillings for cakes, biscuits, pies, cookies and other products.

Figure 7: European market channels for jams, jellies, purées and marmalades

Read our tips for [Doing business](#) and [Finding buyers](#) on the European market for processed fruit and vegetables.

## **7. What are the end-market prices for jams, jellies, purées and marmalades on the European market?**

Indications of margins according to the final retail prices for jams, jellies, purées and marmalades are not very precise, as the whole sector contains many different products. The prices are also different between producing countries regarding the type, size of packaging, fruit type, and variety and quality of products. Therefore, exporters from developing countries can only have a very rough general overview of the price development.

Roughly speaking, the Cost, Insurance and Freight (CIF) price represents around 25–50% of the retail price for a retail package of jams, jellies, purées and marmalades. In cases when the final retail product is sold directly to retail chains, the share is much higher.

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

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

Table 2: Price breakdown for jams, jellies, purées and marmalades

Steps in export process	Type of price	Average share of the retail price
Production of fruit or vegetables	Raw material price (farmers' price)	10% (in case fresh or frozen fruit is used as raw material) 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 800–1000 grams)	100%

Source: Market researcher compilation based on industry sources

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

If farmers add value to their produce through differentiated quality, food safety, certification and processing steps, their prices can also be higher.

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