

Exporting fresh fruit and vegetables to Europe.

The European Fresh Fruit and Vegetables sector offers opportunities for exporters. Here you'll find information that can help you get your fresh fruit and vegetables on the market in Europe.

• 1) What competition do you face

The buyer power of European importers is high. For niche or premium products, it is easier for suppliers to influence the buying process. This is thanks to the growing demand for tropical, exotic and high-quality off-season fruit and vegetables. These fruit and vegetables are not easily replaced by other products; however, strict buyer requirements as well as forward and backward integration of the supply chain will make it increasingly harder for new and small companies to enter the market.

1 . Market entry: Which opportunities and barriers will you face when trying to enter the European market?

The European market for fresh fruit and vegetables is a very mature market that is well managed by legislation and certifications. Opportunities can be found in the accurate response to market needs, good compliance with buyer requirements and product differentiation.

Certification and high standards make market entry difficult

Certification schemes are essential on the European market for fresh fruits and vegetables. Although different certificates are common in different European end markets, all markets require quality, food safety and – to a certain extent – awareness of environmental or social aspects of your production. According to European buyers, your certification and pest analysis often receive just as much attention as the product itself.

It is mainly the retail that is continuously raising the standard and importers act on it. Consequently, as an exporter of fresh fruit and vegetables, it is becoming more and more difficult to enter the European market. This especially affects smaller exporters. However, you have to understand that these high standards also affect the potential buyer of your product. They often compete in gaining access to quality fresh produce, as other markets are less strict and offer good prices. This can give you more power for negotiation with your European counterpart.

Trade relations are intensifying

As rules get stricter, supply chains become more direct. Retailers want to be closer to the source and importers integrate with growers in order to maintain control over the high quality standards and to fulfil the needs of their retail customers.

Establishing a close cooperation can enhance your success and reputation as a reliable supplier.

Buyers are generally not eager to replace well-established relationships that meet all of their requirements or that supply specific brands. Nevertheless, attractive pricing and differentiated products are always good arguments to win their confidence.

Remember that reliability is a two-way street and poor market conditions can bring out the worst in people. Product quality claims are a common practice in the fresh trade.

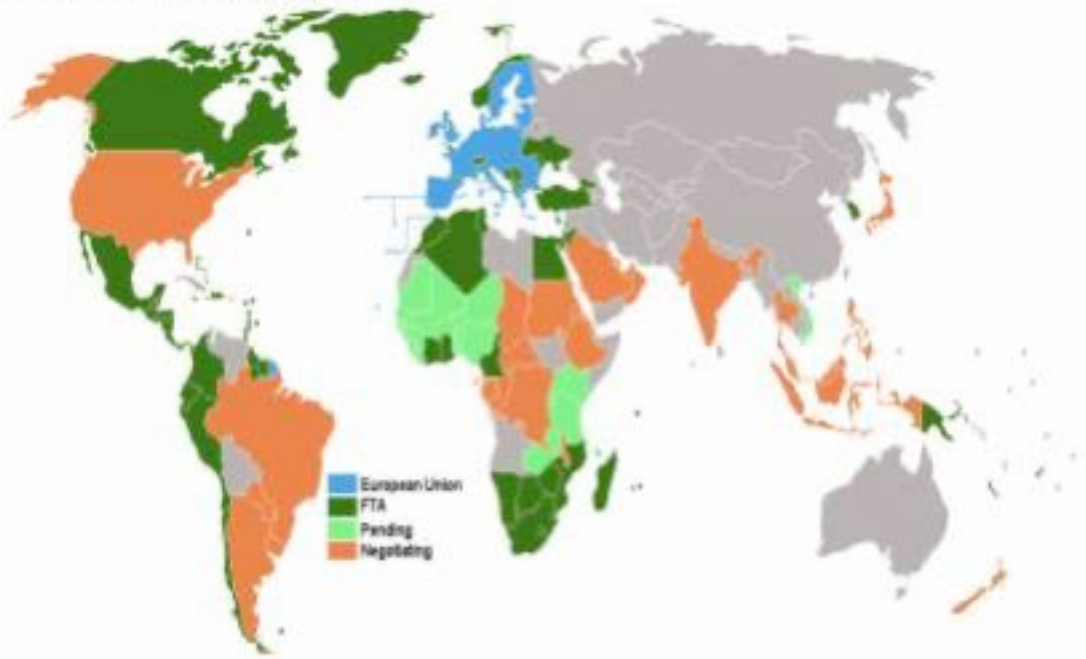
Tips:

- Get to know your buyer and try to build partnerships. Make sure that you arrange for the basics when entering into new deals. For example, think about taking pictures of your product before shipment, negotiate a minimum price and stay alert.
- Always be careful when being approached by unknown buyers that promise you an incredible return on your product. Incredible promises are often not realistic.
- Check out the different types of certification schemes on the [ITC Standards Map](#).
- Find more information about the [European buyer requirements on the CBI Market Intelligence Platform](#).

EU Free Trade Agreements

The creation of business opportunities for European exporters is a key priority for the European Union. This process is facilitated by Free Trade Agreements (FTAs). In return, partner countries can negotiate preferential tariffs for the export of fresh products to the European Union. Important suppliers of fresh fruit and vegetables (for example, Morocco, Egypt, Colombia, Peru and South Africa) have FTAs with the European Union. Depending on their content, such agreements can provide advantages in the trade of fresh products. For a complete overview of FTAs with the EU, see the [European Commission website](#).

Figure 1: Free Trade Agreements



Source: [Wikipedia](#)

Tip:

- Determine whether your country has a Free Trade Agreement with the European Union and whether your product qualifies for a preferential tariff. Determine your advantages or disadvantages compared to direct competitors from other countries.

Grower's licence

Having a licence from seed companies may lower the threat of new entrants temporarily. Access to the right plant material and varieties in order to meet quality and taste requirements is important, specifically for the more common products. Remember that breeder rights are strictly regulated in Europe.

Tip:

- Gather information on which varieties are in demand from European buyers and acquaint yourself with European regulations on plant breeders' rights through the [Community Plant Variety Office \(CPVO\)](#).

2 . Product competition: What are substitute products?

This section describes the existence and competing power of substitutes for fresh fruits and vegetables. This may include candy bars and other snacks, fruit and vegetable juices, prepared or processed products, or even vitamin pills.

Substitution by price variation

Price is a major factor that determines which fresh fruit is chosen. When mangoes are expensive, consumers can decide to buy other, lower-priced fruit products. The availability of fresh produce is generally very good and broad in terms of assortment. Nevertheless, consumers are mostly buying the same products again and again or looking for specific products to use in specific dishes.

Under normal price conditions, the threat of substitution is low. However, when exporting, you have to be able to absorb possible fluctuation in demand as well as price.

Fresh snack alternatives

Fruit and vegetables are considered to be a healthy alternative to conventional snacks. This provides opportunities, although not always as a fresh product. Fruit and vegetables are used in fruit bars, smoothies and vegetable crisps, among other products.

Freshly cut fruit and "snack vegetables" are an upcoming and growing market. Exporters can respond to this trend by supplying well-ripening and tasty fruit as well as small-size products that are ideal for individual consumers, such as small "sunset" papayas, mini watermelons, baby cucumbers and cherry tomatoes.

Tips:

- Visit retail outlets when visiting Europe to get a good impression of the types and varieties that appeal to consumers in your target country.
- Ask your buyer how you can cooperate in the promotion of health benefits of your product, which is a responsibility shared by the entire supply chain.

3 . Company competition: Who are my rivals?

Competing on the European market is a game of price negotiation, especially when you are not part of a supply programme. Complying with your buyer's requirements and keeping your promises will keep you in the game.

Position in the market

High competition in the main fruit types

The intensity of competition depends on the product, geographical market, sales channel and segment. Competition between suppliers of commodity products such as bananas, pineapples and oranges is high, with a few large firms dominating the market. For most products, there are many suppliers from which buyers can choose.

Exporting to the European market principally involves competition on price, volume, and adherence to strict rules and regulations. Setting your product apart from the rest by differentiating on added value such as quality, taste and sustainability may decrease competition or give you a more advantageous position. For smaller niche markets in Europe such as exotic products, competition can be less intense, since those products are not widely available or grown in Europe.

Tips:

- Do not to compete on price only but on added value (organic, sustainable, healthy, ready-to-eat) and differentiated products.
- Team up with other producers when you lack company size or product volume. Make yourself an attractive and competitive supplier.
- Develop long-term partnerships with European buyers that provide you with more knowledge and stability on the European market. It also helps you establish relations with larger retailers.

European competitors are productive and well organised

The European Union provides one of the largest markets for fresh fruit and vegetables, and suppliers can expect their products to be moved extensively across the continent. Over 80% of European fresh exports are destined for the internal market. For in-season fruit, southern Europe is a strong competitor of suppliers from developing countries. European grower organisations are well organised and have optimised their marketing tools, including social media and online presentation.

Tip:

- Familiarise yourself with the possibilities of using social media and other information technologies for promotion and customer relationships. Social media such as LinkedIn, Facebook, Twitter and WhatsApp are widely used in Europe.

Southern Europe is strong in competing production

Based on the 2016 production data, Italy and Spain produced over half of European fresh fruit (mainly grapes and citrus fruits), and over 40% of the fresh vegetables (excluding potatoes). The Netherlands is also a top producer of fresh vegetables, producing mainly tomatoes, cucumbers and sweet peppers from greenhouse horticulture. As an exporter from a developing country, you must be aware that local produce in Europe is often preferred over imported products.

With an export value of over 7.4 billion euros, Spain accounted for over 30% of Europe's fresh fruit exports in 2017. The Netherlands followed with a value of 5.7 billion euros.

Climate and geography determine competitiveness

Opportunities and competition will vary depending on your product but are also determined by geography and climate. The principal suppliers to the European market produce counter-seasonally or produce tropical fruit that is difficult to grow in Europe.

In 2017, bananas represented over 34% of the total import value from developing countries, followed by grapes, avocados and limes. In the past five years (2013 to 2017), the import from South Africa (citrus, grapes), Turkey (grapes, citrus), Peru (avocado, mango, berries), Morocco (citrus, soft fruit) and Mexico (limes, avocado) increased.

For vegetables, the imports show a gradual growth. Europe imports tomatoes, peppers, potatoes and onions from nearby countries such as Morocco, Turkey and Egypt. In terms of import value, Peru and Kenya are also significant suppliers of respectively asparagus and beans.

New suppliers and suppliers of non-traditional fruit and vegetables can best achieve success in specific niches for exotic and out-of-season fruit.

Climate conditions can be a decisive factor. Times of low supply in one region due to poor harvest, pests or climatic difficulties can result in a better market position and bargaining power for other production regions. Although impossible to predict, short-term opportunities and difficulties are typical in the fresh trade.

Tip:

- Plan your supply carefully. If you want to export a fruit or vegetable product which is already available in Europe, timing is important. Check the [production calendar](#) in Europe to determine the potential demand for imported fresh

products. Buyers try to offer their customers the same products year-round and need to fill the gap in their seasonal planning. Timing is crucial.

Position in the supply chain

Strong buyer position for supermarkets

The buyer position of European supermarkets is strong and is expected to increase even more in future. This is evident in the demanding requirements and strict conditions that supermarkets set.

Large retail organisations also put tremendous pressure on prices. This pressure is then passed on from service providers and importers to the exporter and producer.

In this price-driven business, it is unlikely that your European buyer will lose money. When price levels go down, they will most likely negotiate the new terms of delivery with you.

Tips:

- Present yourself as a reliable (adhere to your agreements) and accessible (be easy to contact) partner.
- Aim to become a direct or indirect part of a long-term buying programme with a European retailer, but only if your company is ready for that kind of commitment.
- Have a look at the website of [France Agrimer](#) or the [Fresh Fruit Portal](#) for a rough indication of wholesale catalogue pricing. Be aware that these prices are mostly indicative and negotiable.
- See CBI's [Market channels & segments](#) for more information on the role of the different players in the supply chain.

Supply chain transparency

Retailers and wholesalers require full transparency of their suppliers from production to consumer. This assures them of your good conduct and reduces their risks in food safety. However, it goes as far as the consumers, informing them about the origin and producer of the product.

You will have an advantage over your competitors if you are able to provide transparency along the supply chain. Be open to regular audits and consider these to be helpful in order to improve your day-to-day operation.

Tips:

- Increase your transparency by showing end-users where a product comes from, preferably at the farmer level. Use "storytelling" and be as open and honest as you can be.
- Always communicate good news and bad news. Open communication helps you build and maintain relationships in the competitive field.

- 2) [Which](#) trends offer opportunities?

There are opportunities for fresh fruit and vegetables in Europe thanks to the increased popularity of healthy, natural as well as organic products. Consumers look for good taste and a convenient purchase. They have also become more aware of social and environmental issues. More integrated social and certification programmes are introduced with increased sharing of information along the total supply chain. Meanwhile, product innovations will improve the customer experience and taste. These developments require you to specialise further and integrate with actors within the supply chain.

1 . Increasing preference for locally grown products

The total value of the European trade in fresh fruit and vegetables is increasing gradually year by year. There is an increasing preference for locally grown fruit and vegetables, but the import of out-of-season and more exotic products continues to grow as well.

2 . Market diversification: new, healthy, tasty and easy

Healthy living

Health has always been a strong selling point for fresh fruit and vegetables. In the coming years, the importance of communication on the health benefits of these products will increase.

Especially in north-western Europe, products with specific healthy characteristics such as berries (blueberry, açai, cranberry, physalis), avocado, pomegranates and papaya have become more popular. The continuation of this development has been confirmed by the fact that leading retailers have started to embrace these products. Despite their growing popularity, however, many health foods remain specific to relatively wealthy consumer groups and specialised import companies.

Popularity of pure and organic continues

A significant group of European consumers are increasingly seeking pure and natural products. This is a principal motivation for them to buy organically produced fruit and vegetables, because they are associated with health and better taste.

According to data from [FiBL](#), the European organic market grew by 12% in 2016 to a retail turnover of 30.7 billion euros.

The market share for organic food in Europe varies from around 1% in most eastern and southern European countries to 8–10% in Denmark, Switzerland, Sweden and Austria. In terms of volume, Germany offers you the largest market for organic food, representing almost a third of the organic sales. The organic food consumption develops exceptionally well in relatively wealthy countries.

Although still considered a niche, the organic market is expected to grow over the next years. Among the top vendors in Europe are Tesco, Metro, Carrefour, Ahold and the REWE group. But there are also specialised organic retail chains, such as [Denn's Biomarkt](#) in Germany and Austria, [Biocoop](#) in France and [Ekoplaza](#) in the Netherlands.

Organic regulations will become difficult for developing countries

Often, the demand for organic products exceeds the supply, making it easier to find buyers and better margins. On the other hand, it can be challenging for exporters in tropical climates to comply with the increasing organic standards in Europe.

After several years of negotiation, a new set of regulations are set to be implemented in July 2020. According to the [European Council](#), this new agreement aims to guarantee fair competition, prevent fraud and improve consumer confidence. Importers have already started with stricter compliance.

However, the [International Federation of Organic Agriculture Movements](#) (IFOAM) considers it very likely that many small organic producers in developing countries will not be able to meet the requirements which are designed for the EU context, due to different socio-economic and geographical conditions. The administrative burden and costs might also be a problem. This means that you as a producer will have to evaluate your potential as organic supplier very well.

Tips:

- When focusing on organic fruit and vegetables, find specific market partners that are well integrated in this segment and have knowledge of European legislation.
- Consult [Organic-world.net](#) and [IFOAM reports](#) for detailed information on organic production and sales in Europe.
- For organic requirements, also see the [buyer requirements](#) on the CBI market intelligence platform.

Consumers combine price-consciousness with luxury spending

The market for fresh fruit and vegetables has traditionally been driven by price, but today's market has become more dynamic. Retail discounters are claiming increasingly greater market shares, while consumers are complementing their price-conscious shopping rituals with an interest in exotic or special-quality fruit and vegetables.

The market for special niche products is growing. Niche products and new varieties will continue to emerge, providing unique taste and triggering consumer indulgence, particularly within the high-end market.

Fresh products such as avocados, mangoes and sweet potatoes have shown a strong annual import growth of 10% to 20%, while other, more common and large-volume products such as oranges and tomatoes have seen little fluctuation.

Branding enhances consumer experience

In addition to consumers' preference for exotic and special-quality fruit and vegetables, taste and experience are playing an increasingly important role. Consumers are willing to pay premium prices for products that have consistently good taste. Branding and storytelling are necessary tools to support the marketing of exceptional taste.

Demanding and changing consumer habits motivate suppliers to diversify and innovate. To make this innovation possible, you must be able to supply a constant quality.

Tips:

- Make sure that you use excellent seasonal planning and logistics. Poor quality and immature fruit will hurt the consumption as well as your reputation.
- Use the superlative taste of your product as a marketing tool on packaging, or through magazines or the internet. Be familiar with taste preferences per country or region.

Convenient food

Lifestyles are becoming more fast-paced and the interest in easy and convenient foods is increasing. Especially in north-western Europe, retailers are responding to this trend with freshly cut fruit, snack vegetables, seedless fruit, easy peelers, prolonged shelf life, individually sized products (for example, mini papayas or mini watermelons), ready-to-eat products and e-commerce. Although the demand for convenience products in other parts of Europe is lower, it is on the rise as well.

Specific trends with growth potential include ready-to-eat and ripened fruit. An underlying development is the improvement of ripening processes for fruits such as mango, avocado and papaya in the importing country. It is convenient for the consumer and cheaper in transport than airfreight of already ripened fruit.

E-commerce facilitates fresh products on demand, thus further strengthening the convenience trend. Examples are [HelloFresh](#), [Gousto](#) and home delivery services offered by supermarket chains.

Tip:

- Use the right seeds or varieties, as well as seasonal planning, and meet all logistic requirements to acquire a good position in the supply of convenience fruit and vegetables. For example, supply mature enough fruit that can ripen in a conditioned environment before it reaches the consumer.

3 . Good conduct determines success

Certification is as important as the product itself

Food safety and certifications have become leading aspects in the trade of fresh products. [GLOBALG.A.P.](#) has become the standard certification and the required maximum residue levels (MRLs) are becoming stricter than the legal limits. It seems that buyers nowadays are more concerned about certification than the product itself. Experienced buyers resent the fact that more and more fresh fruit professionals only focus on paperwork and lack actual product knowledge.

The paper trail and the strict requirements are a challenge for every producer, exporter and importer. At the same time, if applied well, they can improve your competitive position.

Tips:

- Work together with importers on tracking and tracing systems. Gain an advantage by demonstrating good conduct and consistent compliance with food safety standards.
- Certify and organise your production before exporting to Europe. Be professional; your supply chain is only as strong as the weakest link.
- Be up to date with MRLs and food safety requirements. Check the [buyer requirements](#).

Sustainable produce is becoming mainstream

On all levels in the value chain, people are gaining interest in more sustainable and responsible fruit and vegetables. This trend relates to many aspects such as working conditions, water use and waste management, among other things.

The awareness among consumers is growing thanks to more transparency. Retailers and traders throughout Europe are also joining forces in the [Sustainability Initiative](#).

Fruits and Vegetables (SIFAV), coordinated by the Sustainable Trade Initiative (IDH). They aim to make all imports from Africa, Asia and South America 100% sustainable in 2020.

Industry sources mention the conservation of water resources as one of the principle concerns in the production of fresh fruit and vegetables.

You can anticipate this by demonstrating that your product has been produced in a sustainable way, both socially and environmentally.

Tips:

- Invest in social and sustainable practices and certification to maintain your position on the European market in future and increase the value of your product. Make your product supply chain transparent by using a website and QR codes. These can give consumers insight into the product, the people and the plantation.
- Read about the various social compliance programmes and certificates (for example, BSCI, ETI, Fair for Life, GSCP and Fairtrade).

4 . Specialisation and integration

Specialising role for importers

As a result of increasing competition and buyer concentration, the role of importers and wholesalers is changing. They become more specialised and are looking to establish a unique market position.

Importers and distributors focus more and more on ensuring “just-in-time” delivery, trying to shorten their supply chain to retailers and saving on warehousing costs. Importers that supply to large retail formulas prefer to work with large producers and large quantities. They handle the European logistics without having their own facilities. If plant space is needed, they will hire it temporarily. Importers that sell from their own warehouses have difficulties in competing with importers that have arranged their logistics externally.

As a smaller exporter, you can best search for opportunities within a broader spectrum. This also includes traders that do not have direct access to supermarkets and that specialise in other segments or niche markets.

Tips:

- Define your strategy and choose an appropriate marketing channel based on the strengths of your company, preferably before closing any contracts.
- Find a large importer/distributor if you focus on bulk production and make sure that you can handle the strict logistical planning. Work with specialist importers if you supply smaller quantities of special products.

Vertical integration

Specialisation is often accompanied by vertical integration. Supply lines are becoming shorter and more efficient.

Contact between farmers, traders and retailers is becoming closer.

Recent experiences have also yielded examples of integration with a negative impact. For some, investments in warehousing and logistics have had significant financial consequences when the economic crisis occurred in 2008.

Nevertheless, the key to future development resides in the integration of the core activities. Control throughout the entire value chain is essential in order to build expertise in specific products and to comply with the strict delivery terms of large retailers.

Tip:

- Profit from the experience of your buyers and business partners. In some cases, joint ventures with European companies could improve your market position in Europe.

5 . Cultural, economic and political influences in trading

Brexit

When the United Kingdom announced its intention to leave the European Union after a referendum vote, companies expressed their concerns for potential consequences. The fresh fruit and vegetable sector is also affected, mainly because of its international nature. Nobody knows exactly what the long-term effects will be, but the most notable changes so far have been:

1. a decreased availability of affordable labour in the United Kingdom due to many foreign workers leaving the country;
2. a devaluation of the British pound.

The United Kingdom is an important market for exporters from developing countries. However, with the current pressure on prices, you can best look for additional or alternative markets.

Eastern Europe is emerging

Currently, the market for tropical fruit and exotics in the eastern Europe is still relatively small, but it is considered a growth market. Countries such as Poland and Romania are following the same trends as the rest of Europe. They are starting to buy more and more tropical fruits such as mangoes and avocados. With consumption still being low, they have more room to grow.

Consumers in eastern Europe are very price-conscious, and exotic and tropical fruits are relatively new for most consumers. A good way to enter this market is through importers in western Europe that are extending their business to Central and Eastern Europe. It is also a good market for fresh products that do not reach the higher standards in western Europe. Remember that payment morals may also be less strict.

Tip:

- Invest in your European contacts and look for possibilities to extend exports to upcoming European countries. Visit trade fairs such as [Fruit Logistica](#) or invite importers and retailers to visit your company.

The European market is highly regulated

Individual Member States of the European Union maintain strict control over the fresh food market. European and Member State decisions can have a major influence on your market. Examples of European interventions are:

- compensation and subsidies for farmers in Europe;
- phytosanitary restrictions on South African citrus fruit due to the threat of Black Spot;

- European policy against genetically modified fruit and vegetables.

Tips:

- Keep up to date with European rules and regulations on food safety, genetic modification and phytosanitary limitations; for example, via www.efsa.europa.eu or the [RASFF System for Food and Feed Safety Alerts](#) for temporary import restrictions.
- Be aware of the importance of plant health and the good quality of the border checks, which may cause rejection for the European market or ultimately wider import bans.

3) What requirements should your product comply with?

Europe is very demanding about food safety, which is why dealing with fresh agricultural products is subject to various legal and other buyer requirements. But there are also opportunities to distinguish yourself by applying additional or niche market quality standards. This document provides an overview of the most common requirements and standards, as well as the specific requirements that apply to niche markets such as organic or Fairtrade fruit and vegetables.

1. Which legal and non-legal requirements must your product comply with?

When exporting fresh fruit and vegetables to Europe, you have to comply with the requirements below. These requirements can be categorised as:

1. food safety;
2. product quality;
3. social, environmental and business compliance.

For a full list of legal requirements, please consult the [EU Trade Helpdesk](#), where you can select your specific product code under Chapters 07 and 08.

Limited use of pesticides

To avoid health and environmental risks, the European Union (EU) has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed will be withdrawn from the European market.

Note that buyers in several Member States such as the United Kingdom, Germany, the Netherlands and Austria use MRLs which are stricter than the MRLs laid down in European legislation. Supermarket chains are the strictest and demand 33% to 70% of the legal MRL.

More and more buyers ask for upfront information about your pesticide spray programmes and records. Shipments are checked before they are sent to the retailer. Pesticide management takes a lot of responsibility on your part as a producer or exporter.

Tips:

- Use the [EU Pesticide Database](#) to find out the MRLs that are relevant for your products. You can select your product or a pesticide and the database shows the list of associated MRLs.
- Apply [integrated pest management](#) (IPM) to reduce the amount of pesticides. IPM is an agricultural pest control strategy which is also part of [GLOBALG.A.P.](#) certification. It uses natural control practices such as the application of pests' natural enemies. The fewer chemicals you use, the better your marketing position will be for export to Europe.
- Always check whether your buyers have additional requirements for MRLs and pesticide use.

Avoiding contaminants

Contaminants are substances that have not been intentionally added to food, but may be present as a result of the various stages of its production, packaging, transport or holding. Similar to the MRLs for pesticides, the European Union has set limits for several contaminants. Especially the limits for nitrate (in spinach and lettuce) and heavy metals such as cadmium, lead, mercury and inorganic tin, are relevant for fresh fruit and vegetables. For most fresh fruit or vegetables the limit for lead contamination is 0,10 mg/kg and for cadmium 0,050 mg/kg.

Tips:

- Find the [maximum contaminant levels in the Annex of Regulation \(EC\) 1881/2006](#). Check whether your food product is included in one of the product groups. Be aware that the particular product may not be mentioned specifically but can be included in a wider product group. For instance, mango may not be found, but fruit can.
- Find out more about the prevention and reduction of lead contamination in the [Code of Practice](#) published by the FAO Codex Alimentarius.
- Check the European Commission's fact sheet on food contaminants [Managing food contaminants: how the EU ensures that our food is safe](#).
- Read more about contaminants on the [website of the European Commission](#).

Microbiological criteria for pre-cut fruit

When supplying pre-cut fruit and vegetables, as well as unpasteurised juices or sprouted seeds, you must take into account microbiological hazards such as salmonella and *E. coli*. These substances should be absent when testing your product. European Regulation (EC) No 2073/2005 will provide you with information about testing methods, sampling plan and measuring limits.

Tip:

- Make sure to maintain excellent hygiene practices in your production process to avoid microbiological contamination. Work with hygiene standards and risk assessment such as [HACCP](#). See the certification schemes below, such as BRC and IFS, which are based on HACCP principles.

Plant health

Fruit and vegetables exported to the European Union must comply with European legislation on plant health. The European Union 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. Most importantly, your home country needs to have phytosanitary agreements with the European Union in place. Otherwise, you will not be allowed to export to Europe.

The following fruit and vegetables are subject to health inspections and require phytosanitary certificates prior to shipping:

- leafy vegetables (celery, basil);
- citrus fruit;
- kumquat;
- eggplant;
- persimmon (kaki):
- apple;
- pear;
- mango;
- passion fruit;
- plums;
- guava;
- currants;
- blueberry;
- several exotic products such as rose apple, soursop (guanábana), quince and bitter cucumber.

You can find these products and their Latin names in Annex V, Part B (p. 163) of the European Plant Health Directive 2000/29/EC.

Tips:

- Verify with the National Plant Protection Organisation or food safety authority in your country whether and under which conditions you can export fresh fruit and vegetables to Europe. These authorities normally work with international standards, but always check with your buyer as well.
- Read more about plant health on the EU Trade Helpdesk. A model phytosanitary certificate can be found through Annex VII (p. 170) of the Plant Health Directive.

Marketing standards

European legislation sets general and specific marketing standards for the minimum quality and the minimum maturity of all fresh fruit and vegetables. A marketing standard determines the characteristics of “Extra Class”, Class I and Class II products, the different size codes, and the allowed tolerances in quality and size.

The preferred sizes vary between the different European markets, but the quality is generally “Extra Class” or Class I. You might find a market for Class II products in some eastern European countries, the processing industry or less formal segments.

There are specific marketing standards (MS) for the fresh fruit and vegetables listed below. These products must be accompanied with a certificate of conformity for each

consignment. These certificates can be issued by the European control bodies and in some cases by the country of origin. A sample certificate of conformity can be found on p. 115 in Annex III to EU Regulation No 543/2011:

- apples;
- citrus fruit;
- kiwi fruit;
- lettuce, curly and broad-leaved endives;
- peaches and nectarines;
- pears;
- strawberries;
- sweet peppers;
- table grapes;
- tomatoes.

Fresh products that are not covered by a specific marketing standard have to comply with:

- the general marketing standards (GMS) in Annex I, Part A of EU Regulation No 543/2011; or
- the applicable UNECE standard (sometimes less strict than the EU standard).

Operators are free to choose whether to work with the EU or UNECE standard. If your product is not covered by any specific European standard, you can also check for similar standards in the Codex Alimentarius.

Imports of products intended for processing are not subject to compliance with the EU marketing standards. However, they must be clearly marked on the packaging with the words "intended for processing" or other equivalent wording.

Tips:

- Be on top of quality! If you are not sure, do not send your products but rather look for local alternatives. If you decide to ship your products anyway, be transparent about the quality and discuss this beforehand with your buyer.
- Check which standards are applicable to your product and make sure that your products and the necessary documentation are in order. By filling in your export details at the EU Trade Helpdesk (product codes in Chapter 7 or 8), you can find the contact details of the official authorities by following the link on marketing standards.
- Check out the Codex Alimentarius published by the Food and Agriculture Organization (FAO) to find additional marketing standards for fresh fruits and vegetables.

Control of food imported to the EU

To ensure food safety and avoid environmental damage, your products will be subjected to official controls. These controls are carried out to ensure that all foods marketed on the European market are safe and in compliance with all applicable regulatory requirements.

There are three types of checks:

- a) documentary checks;
- b) identity checks;
- c) conformity checks to marketing standards.

In case of repeated non-compliance of specific products originating from particular countries, the European Union can decide to carry out controls at an increased level or lay down emergency measures. Controls can be carried out at all stages of import and marketing in Europe. However, most checks are done at the points of entry.

For importers of fresh fruit and vegetables, the traceability of products is compulsory. To fulfil this obligation, European importers will require you to provide proof of origin for all fruits and vegetables. In addition to a Bill of Lading, phytosanitary certificate, packing list and custom documentation, you must also use a unique traceability code such as a lot number or GLOBALG.A.P. Number (GGN).

Tips:

- Familiarise yourself with the procedures. Failure to follow the right procedures could decrease and delay orders, increase costs and result in actions by European enforcement authorities.
- Make sure that the accompanying documents (such as a Bill of Lading) correspond exactly to the food products contained in the consignment, including indicated volumes, classes and sizes, number of pallets and boxes, and names of growers.
- Check the documents needed for customs clearance in the European Union.

Certification as guarantee

As food safety is a top priority in all European food sectors, you can expect most buyers to request extra guarantees from you in the form of certification. All buyers in the supply chain, such as traders, food processors and retailers, require the implementation of a food safety management system based on hazard analysis and critical control points (HACCP).

GLOBALG.A.P.

The most commonly requested certification scheme, essential for exporting fresh produce to Europe, is GLOBALG.A.P. This is a pre-farm-gate standard that covers the whole agricultural production process from before the plant is in the ground to the non-processed product (processing not covered). GLOBALG.A.P. focuses on food safety as well as the environment, labour conditions and product quality. It has become a minimum standard for most European supermarkets.

BRC

In addition to GLOBALG.A.P., other food safety management systems can be required as well. Almost all buyers on the north-western European market will require you to comply with the BRC Global Standards, which are widely applied as a standard for hygiene and safety.

IFS, SQF, FSSC 22000

On the European mainland, buyers sometimes require you to comply with the IFS food standard, Safe Quality Food (SQF) programme, FSSC 22000 or other industry-developed standards.

All the mentioned management systems are recognised by the Global Food Safety Initiative (GFSI), which means that they are generally accepted by the major retailers. Compliance with certification schemes varies between countries, trade channels and market situations. Buyers can be more lenient during supply shortages.

Tips:

- Read more about the different food safety standards on the ITC Standards Map or consult the Global Food Safety Initiative (GFSI). It contains a benchmark for relevant additional standards.
- Become familiar with GLOBALG.A.P., as your EU market entry preparation is likely to include GLOBALG.A.P. certification.
- Check with your buyer about their preferred food safety management system and certification, as these are often buyer-specific.

Labelling and packaging

Food placed on the EU market must meet the legislation on food labelling.

Cartons of fresh fruit or vegetables must mention the following particulars:

- name and the address of the packer or the dispatcher;
- name and variety of the produce (if the produce is not visible from the outside of the packaging);
- country of origin;
- class and size (referring to the marketing standards);
- lot number for traceability or GGN if certified GlobalG.A.P. (recommended);
- official control mark to replace name and address of the packer (optional).

For consumer and pre-packed fresh products, you must add the name and the address of a seller established within the European Union with the words “Packed for:” or an equivalent phrase.

Packaging marketed within Europe must comply with the general requirements, which aim at protecting the environment, as well as with the specific provisions designed to prevent any risk to the health of consumers. The packaging must protect the product against contamination, leakage and dehydration. Also pay attention to your buyer’s preference for presentation, such as individual wrapping or sortation (for example, one side up). Products and packaging should be uniform.

Tips:

- Make sure that all mandatory information is mentioned, but also think of other useful information such as logos of importers or certificates.
- Read the labelling and packaging guidelines and regulations on the EU Trade Helpdesk.
- See the Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits and Vegetables (CAC/RCP 44-1995) for instructions on handling, packaging and transport.

2 . Which additional requirements do buyers often have?

European buyers often have specific requirements, depending on their sales channels and product segments. Common buyer requirements include the following:

Social and environmental compliance

There is growing attention for the social and environmental conditions in the producing areas. Most European buyers have a code of conduct to which they will expect you to adhere. For most fresh fruit and vegetables, social compliance is important, although product quality is the top priority.

Initiatives and attention relating to corporate social responsibility (CSR) vary across the various parts of Europe. In the eastern part of Europe, fewer buyers require strict social compliance, while in western Europe some multinationals even have their own compliance programme. Examples include Unilever's Sustainable Agriculture Code and Tesco's Nurture accreditation.

Buyer initiatives which have an impact on you as a supplier in terms of social compliance include:

- the IDH Sustainable Trade Initiative, which has a Fresh & Ingredients programme with the aim to increase imports of sustainably produced crops by 25% in 2020 (against the 2016 baseline);
- the Business Social Compliance Initiative (BSCI) in north-western Europe;
- the Global Social Compliance Programme (GSCP), which provides reference and self-assessment tools;
- Sedex, a non-profit membership organisation to evaluate and manage your performance on labour rights, health and safety, the environment and business ethics;
- the Ethical Trading Initiative (ETI) in the UK.

Examples of social or sustainable labels for fresh fruit and vegetables are:

- GRASP;
- Fair for Life;
- Fairtrade;
- Rainforest Alliance/UTZ (as part of the Sustainable Agriculture Network).

Fairtrade labels are not on the top of the list of buyers because of their complex requirements and high costs. GRASP, which is part of GLOBALG.A.P., is more accessible and is gaining in importance.

Tips:

- Consult the ITC Standards Map for the different labels and to learn about differences between Fairtrade labels.
- Check your company's current performance; for example, by doing a self-assessment on the BSCI website (search for "self-assessment").
- Check with your buyer which social protocol they request. If you choose to certify your production with a Fairtrade label, find a specialised European buyer who is familiar with these products.

Soft skills and company performance are also important

Complying with the food safety requirements, quality standards and certifications is a precondition to market fresh products in Europe, but it is still not a guarantee for success. Buyers look for trust and reliability, which means that your soft skills and performance are just as important as your product. Some of the most important

things in the fresh trade are a timely delivery, proactive communication and commitment to agreements.

However, good conduct works both ways, so be aware of buyers that have a poor reputation or only show a short-term interest. In this fast-moving and perishable market, sudden decisions are taken, such as “dumping” your products at very low prices when the quality starts to deteriorate or when the demand slows down. European buyers are not eager to accept their loss and rather settle by claiming a quality issue. It is crucial that you can deal professionally with claims, whether they are justified or not.

Tips:

- First of all, make sure that you are well organised as a company. This organisation includes maintaining a good logistics planning, documenting your shipments (including proof of quality), responding to your emails within a day and being professional in every aspect of the business.
- Do not put your product in consignment with a buyer whom you do not know. Consignment is not a standard practice any more and it increases your risks significantly.
- Establish and confirm agreements with your buyer on important topics such as delivery and payment terms, product specifications and certifications.
- Also see the [CBI tips for doing business with European buyers of fresh fruit and vegetables](#) on the market intelligence platform.

3 . What are the requirements for niche markets?

In addition to the official and common requirements, specific requirements apply to niche markets such as organic fruit and vegetables.

Organic, a growing niche market

An increasing number of European consumers prefer food products that are produced and processed using natural methods. Organic fruit and vegetables have a higher cost of production but are also better valued on the European market.

To market organic products in the European Union, you have to use organic production methods, which are laid down in [EU legislation](#).

Furthermore, you have to use these production methods for at least two years before you can market the fruits and vegetables as organic.

You (or your importer) must apply for an import authorisation from EU organic control bodies. After being audited by an accredited certifier, you may put the EU organic logo on your products, as well as the logo of the standard holder; for example:

- [Soil Association](#) (especially relevant in the UK);
- [Naturland](#) (Germany);
- [BioSuisse](#) (Switzerland).

Each standard is slightly different, but they all comply with EU legislation on organic production and labelling.

Tips:

- Assess the organic market potential for your specific product. Inform yourself well, because implementing organic production and becoming certified can be expensive and time-consuming.
- Find importers that specialise in organics through trade fairs such as [Biofach](#) or [Fruit Logistica](#) and company directories such as the International directory of organic food wholesale & supply companies ([Organic-bio](#)). Organic importers often play an active role in advisory and guidance of producers.
- Read more about organic farming on an informative website of the [European Commission on organic farming](#).

New legislation for organic

The European Commission made a [proposal for new organic legislation](#) in 2014 and a new set of rules are scheduled to be implemented in July 2020. According to the [European Council](#), this new agreement aims to guarantee fair competition, prevent fraud and improve consumer confidence. Importers have already started to implement the stricter regulations.

In general, organic regulation and testing are expected to become rigorous. Traces of unauthorised substances can result in a direct withdrawal of Organic certification.

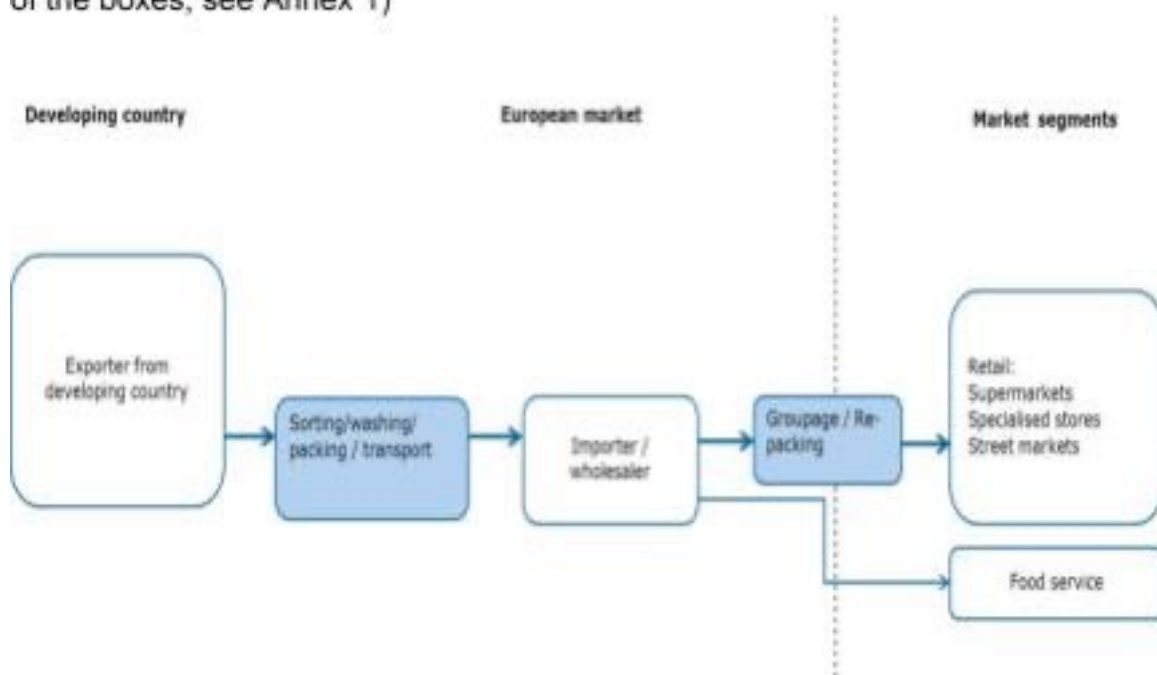
Tip:

- Find more information on the new proposal for organic farming in the press release and the [frequently asked questions](#).

- 4) Through what channels can you get your product onto the market?

The European retail market for fresh fruit and vegetables is dominated by the supermarkets. About 60–90% of produce is sold through supermarkets, depending on the product and country. Supermarkets are demanding customers, generally with more than minimal requirements on quality and efficient consumer response, and providers of import services are the key to supplying them. Some large supermarkets have special service providers who – together with importers and local producers – attend to the smooth delivery and sourcing of good-quality products. Niche products are often traded by specialised traders. It is important to differentiate and select importers that fit your supply.

Figure 1: European market channels for fresh fruit and vegetables (for an explanation of the boxes, see Annex 1)



1 . Importers are the key to the European market

Importance of importers/distributors

Most fresh produce from developing countries is traded via importers. Importers that fulfil the role of intermediary between producer and retailer have developed an efficient organisation. Larger companies have state-of-the-art ripening and packing houses, while others rent facilities only when necessary.

Many supply chains are strictly organised under the direction of the importer/wholesaler or service provider in adherence to the retailer's demands. It reflects the important trend towards vertical integration. As a regular exporter from a developing country, it will be difficult to get around these main service providers; they are the gateway to the mass market.

Smaller importers are searching more and more for niche channels; for example, by specialising only in exotics or the wholesale market.

Increasing role of service providers

Europe counts many importers, but the market is consolidating. Supermarkets are increasingly organising integrated supply chains with a limited number of preferred suppliers or service providers. This enhances responsiveness and safeguards product quality and promotional planning. Larger importing wholesalers will also often act as service providers to the supermarkets, investing in added-value services such as ripening, packaging and mixing.

The Netherlands is an important gateway to the European market

A great deal of produce is imported through the Netherlands (via the Port of Rotterdam) only to be exported to other European markets such as Germany and the UK. The strongest point for Rotterdam is the fast track record on groupage services (combining several small shipments into a single container). Belgium and the UK are also major importers of fresh fruit and vegetables from developing countries. The importance of supply chain logistics (planning & cold chain) in terms of the quality of the final product must not be underestimated. Supply chain management is key.

Investments in infrastructure

New investments are being made in ports and container services as well as reefer services in places such as Rotterdam in the Netherlands. Intermodal transport services (using multiple modes of transport) and connections are being extended and developed. This will further strengthen the position of the Netherlands and Belgium as trade hubs.

Another European initiative is to improve the Fresh Food Corridor (using intermodal containers or vehicles on multiple modes of transport) from the Middle East through the Mediterranean to eastern and northern Europe. This project ended in October 2017 and contributed to a more efficient supply from countries such as Egypt, Jordan and Israel. For Israel, it has already proved a success in a pilot action. For road logistics (for example, from Jordan), stability in the Syrian region is a precondition.

Major destinations include Germany, the UK, Belgium and France

In 2015, European countries imported € 35.8 billion worth of fresh fruit and € 20.7 billion worth of fresh vegetables (including intra-EU trade). Almost 50% of the fresh fruit and over 80% of the fresh vegetables that are imported concern products that are re-exported or locally produced.

- Germany, the UK and France are the largest final destinations, accounting for around 44% of the product value that was imported in 2017 from both within and outside Europe.
- The Netherlands and Belgium are responsible for 21% of the import value and mainly re-export to other European markets.
- Italy and Spain have an 8% share in the European import value of fresh fruit and vegetables, but are also net exporters because of their large own production volumes.
- Eastern Europe has growth potential: well-known tropical fruits such as pineapples, lemons and limes are finding their way through western European ports to new, upcoming markets in eastern Europe.

As a supplier from a developing country, your main export markets will be the Netherlands, the United Kingdom and Germany.

Figure 2: Imported value share of fresh fruit in Europe 2017 In € billion

Germany	17.65%	17.65%	14.71%	14.71%	14.71%	14.71%	11.76%	11.76%	8.82%	8.82%	5.88%	5.88%	5.88%	2.94%	2.94%	17.65%	17.65%
United Kingdom																	
Netherlands																	
France																	
Belgium																	
Italy																	
Spain																	
Poland																	
Other EU countries																	

Source: ITC Trade Map

Figure 3: Imported value share of fresh vegetables in Europe 2017 In € billion

Germany	27.78%	27.78%	16.67%	16.67%	11.11%	11.11%	5.56%	5.56%	5.56%	5.56%	5.56%	5.56%	5.56%	22.22%	22.22%
United Kingdom															
France															
Netherlands															
Belgium															
Italy															
Spain															
Other EU countries															

Source: ITC Trade Map

Distribution hubs match quality with markets

The Netherlands and Belgium are typical trade hubs to northern Europe, where standards are strictly respected. Imported fresh products that do not pass these high standards are rerouted to other markets, such as Rungis in France where fruit and vegetables are traded on the spot (France is a typical end market). When fresh produce has quality issues, often a claim will follow, which is a common way to renegotiate.

Differences in European market channels

The European market can roughly be segmented into three geographical areas with different patterns of consumption and buying behaviour.

- Consumers in north-western Europe have the highest average purchasing power. The market has the highest demand for tropical and exotic fruit and off-season vegetables. North-west European consumers buy most of their shopping in supermarkets. Specialist fruit and vegetables stores are slightly more expensive than supermarkets but carry a more diverse range of products. The role of supermarkets is set to expand further. In this segment, almost all of the produce sold is Class I (highest quality).
- In southern Europe, fruits and vegetables make up a higher share of the diet. Consumers have a stronger preference for taste and local traditional produce, although local supply is not sufficient to meet the total year-round demand. The supermarket channel is gaining importance in these regions as well.
- In eastern Europe, product quality requirements are somewhat lower (Class I and Class II) than in north-western Europe and supermarkets generally have a lesser market share, but this is expanding. In the long run, the market growth in eastern Europe is expected to be substantial, which will also be accompanied by increasing quality standards and sustainable produce. With the increase in quality demands, customers will expect you to spend more attention to a quality supply chain.

Tips:

- Visit fresh markets and retail outlets in different target countries within Europe to understand the local dynamics and preferences of each market.
- Choose your distribution channel carefully according to local taste preferences, quality and market structure. Take into account that your buyer has to deal with strict compliance to large retail chains and expects the same from you.

- Visit trade fairs such as the [Fruit Logistica](#) in Berlin or the [Fruit Attraction](#) in Madrid. Here, you can find most of the important traders.

2 . Good logistics is essential in your trade channel

Post-harvest treatment and logistics are crucial

Many companies and agents are active in the supply channel. Products are usually sorted, washed, packed and sometimes processed (cut or sliced) and repacked before entering the retail channel. Packers operate at different stages of the supply chain to wash and re-pack products from harvest to wholesale into retail packages. Throughout the supply chain, cleaning and decontamination of equipment, containers, pallets, crates and vehicles is of the utmost importance. As an exporter, you must meet the demands of logistics and pay special attention to a timely delivery, quality equipment and packing, cooling, hygiene and correct documentation.

Tips:

- As cleaning and decontamination of transport equipment are crucial, implement and actively operate quality and hygiene procedures. Also see the different food safety systems in the CBI study of [requirements for fresh fruit and vegetables](#).
- Ensure good logistical treatment of your produce and check for the best ways to maintain product quality.

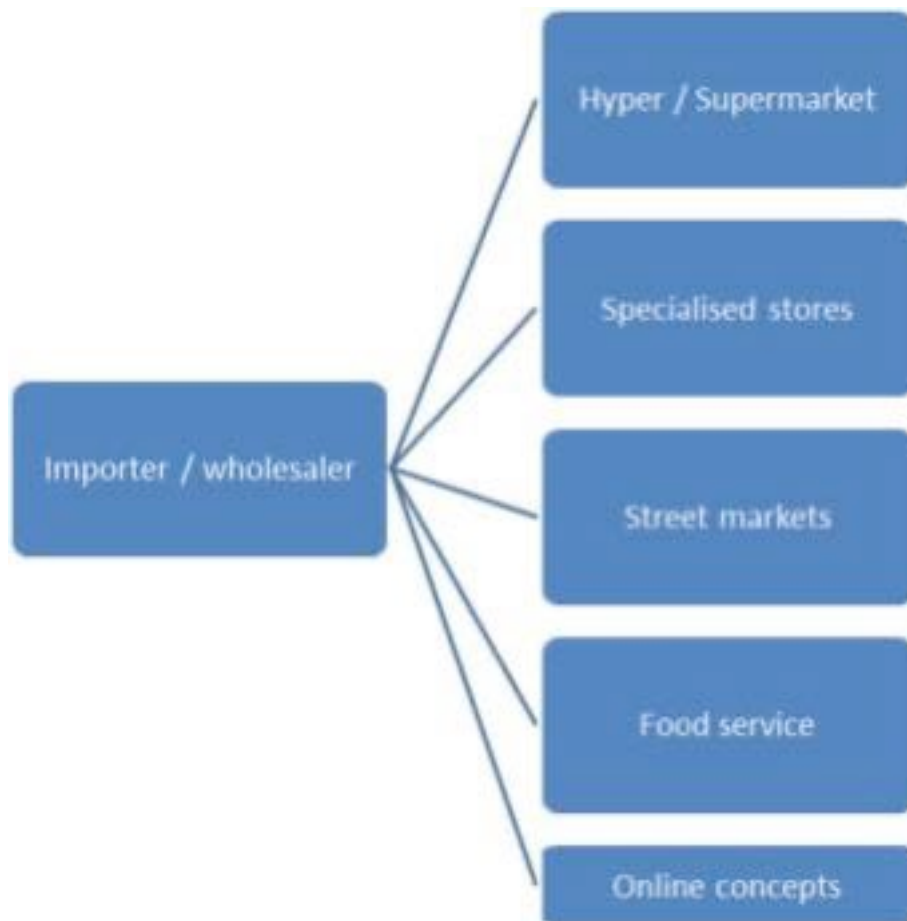
Sea or airfreight depends on the type of product and distance

Common fruits such as bananas and citrus and other more durable products are usually shipped by sea, while air freight is much more common for exotic and premium fruits and vegetables. As sea transport is less expensive and more environmentally friendly, technological developments in sea transport (storage, conditioned containers and ripening) are being explored continuously to reduce the dependence on airfreight.

3 . Supermarkets dominate sales of fruits and vegetables

The European market is divided into different sales channels, with supermarkets being the most important sales channel for consumers and online concepts as a new development in fresh produce. The annex explains more about the different actors in the trade structure and segmentation.

Figure 4: Importer/wholesaler segmentation of the fresh fruit and vegetable sector



Dominance of supermarkets

The supermarkets have market shares of between 60 and 90 per cent in the retail sales of vegetables and fruits, depending on the country. The market share of supermarkets tends to be higher in north-west Europe than in southern Europe.

Traditional fresh fruit and vegetable stores and street markets have seen their market shares decrease to about 10% in some countries.

The dominance and centralised buying of the major supermarkets have increased their commercial power on the market as well as in product requirements throughout Europe. This makes trade more difficult for smaller exporters from developing countries, as product requirements increase. Supermarkets can generally choose from many suppliers, especially for undifferentiated products.

The largest European food retailers are:

- Schwarz Group (including Lidl);
- Tesco;
- Carrefour;
- Metro Group;
- Auchan;
- Rewe Group;
- Edeka;
- Leclerc;

- ITM (Intermarché);
- Sainsbury's.

These concerns listed above usually manage several different supermarket brands.

The traditional fruit and vegetable stores are losing market share. At the same time, there are successful shops that are servicing a specific market for niche products: exotic or ethnic products and specialised organic shops are still expanding. This expansion can be an opportunity for exporters that supply differentiated products in smaller volumes.

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Retail moving away from the grey middle

The mainstream or middle segment is losing market share. Both discount supermarkets and luxury chain stores have been on the rise. If price is not the driver, consumer experience is crucial. Local top-end supermarkets such as Marqt (Dutch) and Grand Frais (French) are just as successful as the international discounters Lidl and Aldi of German origin. This new environment has also created

room for new food shopping and leisure retail concepts such as food courts (for example, the [Rotterdam Market Hall](#)).

You can create opportunities by finding and establishing relations with the right buyers: experienced buyers in exotics, buyers that invest in packing and processing, buyers that get involved in production, buyers that supply specific channels, and so on. However, in a market where the grey middle is lacking, it will become even more important to hook up with buyers that are the right match for your type of product. Differentiation is as important for you as for your European counterpart.

Home delivery and e-commerce

Another new form of food shopping takes place online, which addresses the need for convenience. Large investments in concepts such as [HelloFresh](#), [Gousto](#) and other home delivery programmes are boosting online purchases of fresh food.

Many supermarket chains are also promoting their home delivery services and some go even further. In the Netherlands, the recently introduced online supermarket [Picnic](#) only allows you to shop through a mobile app, after which your groceries are delivered free of charge with electrical vehicles.

Moreover, the potential power of online giants such as Amazon could change market channels indefinitely, with significant consequences for traditional shops.

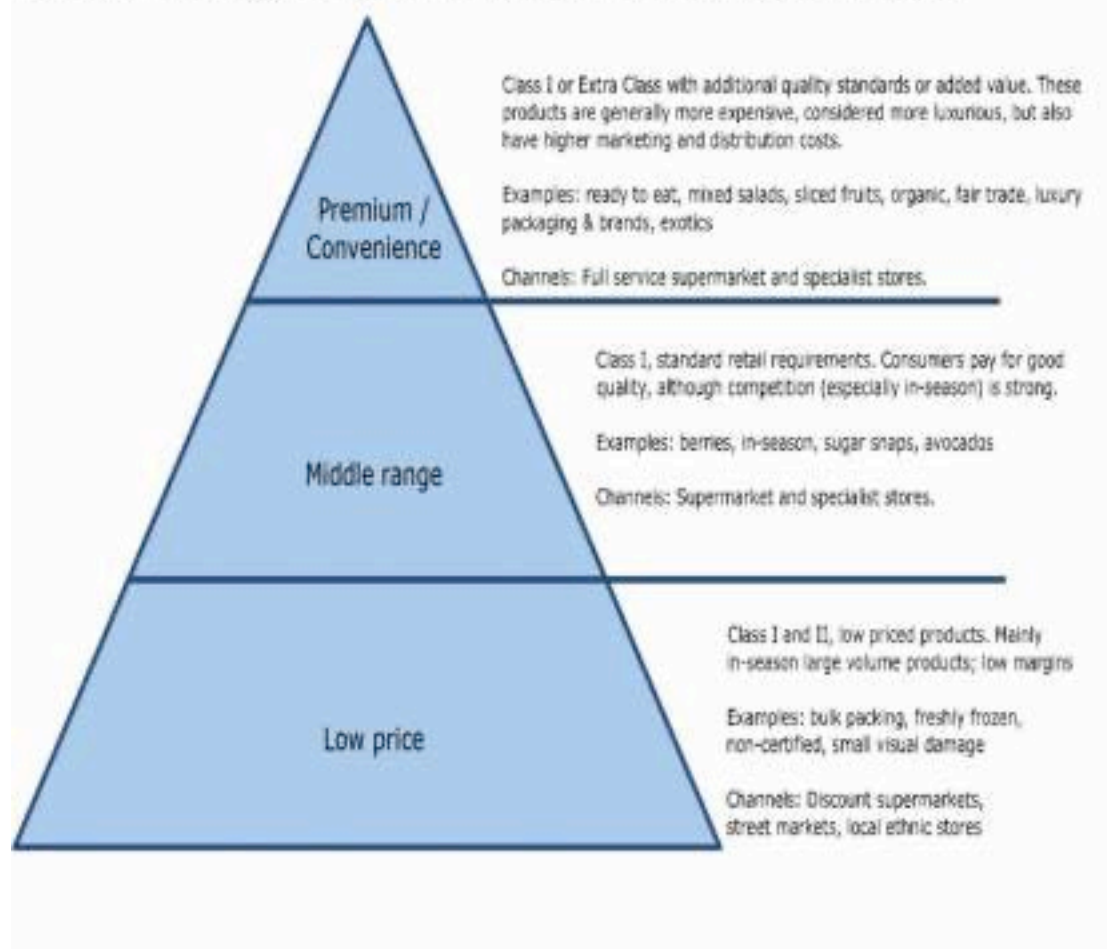
Tips:

- In order to deal with the purchasing power of large retailers, prove yourself to be a reliable and good supplier.
- Set your product apart from competitive products by differentiating and be responsive to your customer's sales strategy.
- Supermarkets may prove to be demanding customers: take advantage of the knowledge of importers/wholesalers.
- Consult the overview of retailers on the website of [FreshPlaza](#).

Segment quality and quantity requirements

Supermarkets – specifically in north-western and southern Europe – demand almost exclusively Class I produce. The quality requirements for street markets and for eastern European retailers are sometimes lower, which provide market access for fresh products that do not meet the highest standards. Also in Eastern Europe, however, quality requirements are increasing.

Figure 5: Retail segmentation of the fresh fruit and vegetable sector



Supermarkets demand much larger quantities than specialised stores and street vendors. The latter are, however, generally supplied by domestic wholesale. When supplying supermarkets, exporters must be able to deliver large quantities of uniform product quality. Discount supermarkets are in the lower price range, but in quality they are often comparable with regular supermarkets.

To become a regular supplier to the large retail chains, timely delivery and cooperation with special promotions as well as flexibility with regard to seasonal or growing demand are vital. Supplying through an importing wholesaler is generally the only way to achieve this status. The importer/wholesaler can plan and redistribute supplies from several exporters to meet customer demands. Nevertheless, it is not uncommon for supermarket representatives to visit overseas growers.

Tips:

- Choose the appropriate segment that coincides with your product quality and your supply volumes.
- Apply good practices and obtain certification for food safety and logistics. For specific buyer requirements, see the [CBI buyer requirements](#).
- Build trust with customers; for example, by focusing on product uniformity and timely delivery, which are highly valued.

- For information on wholesale prices, consult sources such as the [FranceAgriMer website](#). [FreshPlaza Pricewatch](#) or [FreshFruitPortal](#) provide price information up to 2016.

Annex 1: Information boxes for the trade structure (Figure 1)

Importers/wholesalers:

The importing wholesale companies buy produce from abroad and resell it to domestic retailers or re-export it to other countries. They take care of the necessary administrative formalities and often provide services such as packaging and re-packaging, ripening, transport and logistics. These importing wholesalers offer you the best access to the European markets, as they have an extended network of customers varying from retail buying centres and domestic wholesalers to catering companies. Importers usually have long-standing relationships with customers and excellent knowledge of quality requirements, logistics and the formal administrative processes. Some wholesalers use agents to facilitate transactions.

Sorting/washing/packing:

Post-harvest treatments include sorting, grading, cleaning or washing, cutting or slicing, ripening, packaging and labelling. The treatments depend heavily on the type of produce and the supply chain requirements. Usually, but not always, sorting and cleaning of fruit and vegetables is done in the country of origin, as well as packing in wholesale containers (boxes or crates). For some produce, such as avocados, mango and papayas, ripening is done in the destination country.

Re-packing:

After importing to the EU or EFTA market, some produce needs to be re-packed in retail-size packaging. Wholesalers and specialised companies perform this task if required by the wholesalers.

Hyper-/supermarkets:

European supermarkets are divided into large supermarket chains, such as Carrefour, Rewe and Ahold, and smaller independent stores. The larger supermarkets have by far the largest market shares and operate their own (sometimes combined) buying centres and distribution centres. Although supermarkets may be involved in sourcing their fresh produce, they usually rely on the services of importing wholesalers and service providers. Supermarket service providers are wholesalers and logistics service providers who take care of much of the sourcing and distribution process on behalf of the supermarket. They cooperate with importers and are responsible for importing, contracting and combining products from different countries. Directly dealing with supermarkets requires a high degree of business professionalism and access to logistics service providers as well as your own importing experience and facilities. Usually, exporters from developing markets access the supermarket channels through European importers.

Specialised shops:

Specialised fruit and vegetable shops exist throughout the European market, although their market share has decreased to about 10%. Most of them are family-owned, small independent shops that sell fresh fruit and vegetables as well as some related food items. They buy primarily from local wholesalers.

Street markets:

Most European cities have regular (sometimes daily) fruit and vegetable markets. Traders rent stalls and sell fresh produce that they usually source from local wholesalers or producers. The street markets have a decreasing market share of only a few per cent in most countries.

Catering:

The catering channel includes restaurants, hotels, business catering and hospitals. These organisations usually procure fresh fruit and vegetables from local wholesalers. The catering channel has an estimated market share of about 10–15% for fruit and about 20% for vegetables.

E-commerce/online concepts:

E-commerce is growing in Europe, especially on northern European markets, where online shopping has become an integral part of society. Supermarkets are experimenting with home delivery of fresh products and new, independent concepts are emerging (for example, food boxes with recipes). Examples include [HelloFresh](#) and Gousto.