



CBI  
*Ministry of Foreign Affairs*

# **CBI Product Factsheet:**

## **Edible Nuts and Dried Fruits in Europe**

## Introduction

The European Union is the largest importer of the edible nuts and dried fruit in the world. Germany is the largest European importer of nuts and dried fruits in terms of value (25% in 2013), followed by the Netherlands (13%), Italy (12%) and the United Kingdom (10%). 40% of all European imports are from the USA and Turkey. Spain and the Netherlands are Europe's largest exporters. This product factsheet provides you with information on product specifications, statistics, and trends in relation to edible nuts and dried fruits in the European (EU and EFTA) market.

## Product description

### Product Definition

Strictly speaking, in a botanical sense, a nut is a fruit made up of a hard shell and a seed, where the hard-shelled fruit does not open to release the seed. However, in a culinary context, the category of nuts is much broader and can be split into four categories:

- True, or botanical nuts: dry, hard-shelled, un-compartmentalised fruits that do not split on maturity to release seeds (e.g., hazelnuts, chestnuts);
- Drupes: fleshy fruit surrounding a stone, or pit, containing a seed (e.g., almonds, cashew nuts, pistachio);
- Gymnosperm seeds: naked seeds, with no enclosure (e.g., pine nuts);
- Angiosperm seeds: unenclosed seeds within a larger fruit (e.g., Brazil nuts, macadamia, peanuts).

In addition, dried fruit is fruit from which the majority of the original water content has been removed either naturally, through sun drying, or through the use of specialised dryers or dehydrators. Dried fruit has a long tradition of use, and is prized because of its sweet taste, nutritional value, and long shelf life.

In international trade, edible nuts and dried fruits are often taken together. This product factsheet, therefore, covers general information regarding the market of edible nuts and dried fruits in Europe which is of interest to producers in developing countries. Examples of products that fall within this product category are provided in the table below:

Edible nuts	Dried fruits
Coconuts	Dried bananas
Brazil nuts	Dried dates
Cashew nuts	Dried figs
Almonds	Dried pineapples
Hazelnuts	Dried oranges and clementines
Walnuts	Dried grapefruit
Chestnuts	Dried lemons and lime
Pistachios	Dried grapes, currants and sultanas
Macadamis nuts	Dried apricots
Kola nuts	Dried prunes
Areca nuts	Dried apples
Pecans	Dried peaches, incl. nectarines
Pine nuts	Dried pears
Other nuts or mixtures of nuts	Other dried fruit or mixtures of dried fruit

Please see the Annex for the full table with the products (and their product codes) in the product group of edible nuts and dried fruits.

## Product Specification

### Quality

Generally, nuts contain valuable sources of energy, protein, oils, minerals and vitamins that are very suitable for human consumption. In addition, dried fruits retain most of the nutritional value of fresh fruits, and could therefore also be considered as healthy food products. Dried fruits are important sources of vitamins, minerals and fibre in the diet and provide a wide array of bioactive components.

Nuts are vulnerable products. During harvesting and processing, nuts can be broken or discoloured. In addition, nuts correspond to a relatively high risk of contamination with aflatoxins, a toxic secondary metabolite produced by a species of fungi. In contrast with edible nuts, dried fruits are a remarkably stable food due to the high drying and processing temperatures, the intrinsic low pH of the fruit, low water activity (moisture content) and the presence of natural antimicrobial compounds. There is no known incident of a food-borne illness related to dried fruit.

In general, the main European quality requirements for edible nuts are maximum levels of aflatoxins. There is harmonised [EU legislation](#) on aflatoxins. The following general requirements also apply to nuts:

- Control measures involving treatment with chemical, physical or biological agents (pesticides) should be carried out in accordance with the recommendations of the appropriate official agency, by or under the direct supervision of personnel with a thorough understanding of the hazards involved, including the possibility of toxic residues being retained by the crop.
- Harvesting, production operations, storage and transportation should be clean and sanitary. High humidity, which is conducive to proliferation of mould and development of mycotoxins (aflatoxins), should be avoided, particularly during storage.
- To the extent possible in good manufacturing practice, the products should be free from objectionable matter.
- The products (a) should be free from pathogenic microorganisms; and (b) should not contain any substances originating from microorganisms, particularly aflatoxin, in amounts which exceed the maximum levels as set by the EU.
- Other quality requirements depend on what you agree with your buyer (see also Buyer requirements).

The requirements for dried fruits are similar, except that contamination with mycotoxins is much less of an issue.

Information on quality requirements for specific edible nuts and dried fruits can be found in the [Codex Alimentarius](#) ('Food code' of WHO and FAO).

## Labelling

In accordance with European labelling regulations, food has to be labelled with particular information. For bulk products, some of the mandatory information is allowed to be included in the accompanying commercial documents instead of on the external packaging. However, a minimum set of information should always appear on the external packaging:

- name of the product;
- lot identification;
- name and address of the manufacturer, packer, distributor or importer;
- date of minimum durability or 'use by' date and
- storage instructions.

However, lot identification, and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark, provided that such a mark is clearly identifiable within the accompanying documents.

Other mandatory food information should be noted in the commercial documents:

- List of ingredients (in descending order of weight);
- Net quantity (in metrics);
- The place of origin or provenance if failure to give such particulars might mislead the consumer;
- Instructions for use should be included to enable appropriate use of the foodstuff;
- A nutrition declaration.

For more information see the new Regulation on the provision of Food Information to Consumers ([1169/2011/EC](#)), which lays down the general rules relating to the labelling, presentation and advertising of foodstuffs. This directive is applied from 13 December 2014.

In product specifications it is common for all types of dried fruit to be labelled according to the size of product. It is common for dried fruit to have internationally accepted grading standards which usually describe the number of fruits in 0.5kg or 1 kg of products (in the UK these grading standards can be described also by the number of fruits in 0.5 lb instead of kg). It is also necessary to label the type of product according to the presence or absence of pits in the fruit.

## Size and packaging

In general, the following requirements apply to product packaging (see [Codex Alimentarius](#)):

(a) Materials. Packaging materials should be stored in a clean and sanitary manner and should not transmit to the product objectionable substances beyond limits acceptable to the official agency having jurisdiction, and should provide appropriate protection from contamination.

(b) Techniques. Packaging should be done under conditions that preclude the introduction of contamination into the product.

Nuts that are intended for wholesale are typically packed in jute or plastic bags or 'polysacks'. Retail packaging includes plastic bags, plastic containers or foil bags.

Dried fruit is usually packaged in export carton boxes lined with food grade polyethylene. In some cases dried fruit can also be packed in bags. Within Europe, the standard bulk package is 10 kg, but 12 kg cartons, 12 - 15 kg plywood joint boxes and 25-70 kg linen fabric bags are also used. When packaged in corrugated or millboard cartons, the product should be transported on pallets. The selected packaging size should be such that the dimensions of the individual area modules or area module multiples conform to the conventional pallet sizes (800x1200 mm and 1000x1200 mm) and cargo units may thus be produced.

See the [Codex Alimentarius](#) standards for fill and weight requirements for individual nuts and dried fruits. Marketing requirements for packaging differ widely among customers and market segments. Therefore, it is crucial that you discuss preferred packaging requirements with your customers.

## Processing

There are differences in processing the different types of nuts and dried fruits. For example, harvesting of tree nuts generally includes shaking the trees and picking the nuts off the ground. This could be a laborious and wasteful process since fruits do not necessarily all ripen within a short period. Plantations can improve efficiency by providing better accessibility, easier harvesting conditions and possibly mechanising the harvesting process. After harvesting, nuts are washed and dried (traditionally by the sun, nowadays increasingly mechanically). Subsequently, some nuts intended for marketing in-shell may have their appearance enhanced by bleaching to remove stains. Other nuts, which are intended to be sold in a prepared and shelled form, need to be shelled or cracked before they can be packed. Dried fruits can be dried whole (e.g., grapes, berries, apricots, plums), in halves, or as slices, (e.g., mango, papaya, kiwi). Alternatively, they can be chopped after drying (e.g., dates) and made into pastes, or concentrated juices. They can also be freeze dried.

## Storage

Most nuts can be satisfactorily stored for several months provided they are kept cool and dry. Of the most well-known nuts, walnuts and chestnuts are among the most perishable while pistachios and almonds can be kept for longer. Many nuts are stored in the shell for longer periods but there is now a trend towards the cold storage of shelled nuts or kernels. Although requiring more space, the best results are obtained by storing in moisture proof containers after thorough dehydration.

## Buyer requirements

Buyer requirements can be divided into (1) *must* requirements, i.e. those you must meet in order to enter the market, such as legal requirements, (2) *common* requirements, those that most of your competitors have already implemented, i.e. you need to comply with these in order to keep up with the market, and (3) *niche market* requirements for specific segments.

A general overview of the [EU buyer requirements for processed fruits and vegetables](#) (including edible nuts and dried fruits) can be found on the CBI's Market Intelligence Platform.



## Requirements you must meet

### Food safety: Traceability, hygiene and control

Food safety is a key issue in EU food legislation. The [General Food Law](#) is the legislative framework regulation for food safety in the EU. To guarantee food safety and allow appropriate action in cases of unsafe food, food products must be traceable throughout the entire supply chain and risks of contamination must be limited. An important aspect to control food safety hazards is defining critical control points ([HACCP](#)) by implementing food management principles. Another important aspect is subjecting food products to official controls. Products that are not considered safe will be denied access to the EU.

#### Tips:

- Search in the [EU's Rapid Alert System for Food and Feed \(RASFF\) database](#) to see examples of withdrawals from the market and the reasons behind them.
- EU buyers will often ask buyers to implement a food (safety) management system based on HACCP-principles (see under Common requirements).
- Read more about HACCP and health control in the [EU Export Helpdesk](#).

### Control of food imported to the EU

In the event of repeated non-compliance, specific products originating from particular countries can only be imported under [stricter conditions](#), e.g. accompanied by a health certificate and analytical test report. Products from countries that have shown repeated non-compliance are put on a list included in the Annex of [Regulation \(EC\) 669/2009](#).

At the moment, groundnuts (aflatoxin) and dried fruits (Ochratoxin A) from different countries (e.g. Afghanistan, Brazil, India, Ghana, Thailand) are on the list.

**Tips:**

- To help you answer key questions about health control refer to the [guidance document](#) of the EU.
- Check if there are any increased levels of controls for your product and country. The list is updated regularly. Check the website of [EUR-Lex](#) for the most recent list (see under Amended by).
- Read more about [health control](#) in the EU Export Helpdesk.

**Avoid contamination to ensure food safety**

Contaminants are substances that may be present as a result of the various stages of growing, processing, packaging, transport or storage. In order to guarantee public health, you are not permitted to introduce food which contains an excessive level of a contaminant to the EU market.

Note that for nuts the risk of contamination with aflatoxin warrants extra attention. As a consequence, the EU sets special requirements. These regulations state inter alia that nuts exported to the EU have to be accompanied by a health certificate that proves the nuts have gone through sampling.

In general, the different forms of contamination for edible nuts and dried fruits are:

- Aflatoxin: limits have been set for aflatoxins B1, B2, G1 and G2 in most edible nuts and dried fruit (see section [2 of Annex of Regulation \(EC\) No 1881/2006](#)).
- Ochratoxin A: applies to dried vine fruit (currants, raisins and sultanas). OTA is hard to prevent as it is closely related to climatic conditions.
- Heavy metals: there are restrictions for lead and cadmium (see [section 3 of Annex of Regulation \(EC\) No 1881/2006](#)).
- Pesticides: the 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 EU market.

Foreign matter: contamination by foreign matter like plastic and insects are a threat when food safety procedures are not carefully followed.

**Tips:**

- Improve your understanding of growing, drying, processing and storage practices and discuss them with your suppliers. For an example refer to the [good manufacturing practices for Tree Nuts and Dried Fruit Processing Plants in Afghanistan](#).
- For information on the safe storage and transport of edible nuts and dried fruits go to the [website](#) of the Transport Information Service.
- Check the European Commission's factsheet on food contaminants "[Managing food contaminants: how the EU ensures that our food is safe](#)".
- Read more about contaminants in the [EU Export Helpdesk](#).
- To find out the MRLs that are relevant for your products, you can use the EU [MRLdatabase](#) in which all harmonised MRLs can be found. You can search for your product or pesticide used and the database shows the list of the MRLs associated with your product or pesticide. Read more about MRLs in the.
- A good way to reduce the amount of pesticides, is applying integrated pest management (IPM) which is an agricultural pest control system that uses complementary strategies including growing practices and chemical management.

**Additives and flavourings**

Products can be rejected by buyers and EU customs authorities if they have undeclared, unauthorised or excessively high limits of extraneous materials. There is specific legislation for [additives](#) (e.g. colours, thickeners) and [flavourings](#) that lists which E-numbers and substances are permitted. If you want to add vitamins you will have to know which [vitamins](#) (see Annex I) and sources, vitamin formulations and mineral substances are allowed (see Annex II).

No product specific legislation regarding composition applies to edible nuts and dried fruits.

**Tips:**

- Refer to the Buyer Requirement module on natural colour, thickeners and flavours for more information.
- E-numbers indicate approval by the EU. To obtain an E-number the additive must have been fully evaluated for safety by the competent food safety authorities in the EU (EFCH). For an overview of E-numbers refer to the Annex of Regulation 1333/2008 (see under Consolidated versions).
- Read more about [legislation on authorised food additives and flavourings](#) under general conditions of preparation of foodstuffs

**Labelling**

In case you are supplying consumer labelled product (in for example cans, jars or boxes) you will have to take into account labelling requirements laid down in [EU Regulation 1169/2011](#). This should inform consumers about composition, manufacturer, storage methods and preparation.

**Tips:**

- In December 2014 [EU Regulation 1169/2011](#) came into effect. This new labelling legislation considerably changed current legislation. For example, allergens have to be highlighted in the list of ingredients and requirements for information on allergens also cover non pre-packed foods including those sold in restaurants and cafés. Read more on about the new labelling legislation on the EU [website](#).
- Read more about [food labelling](#) in the EU Export Helpdesk.

*Nutrition and health claims* - Nutrition and health claims suggest or indicate that a food has a beneficial characteristic. They cannot be misleading. Therefore, only EU approved nutrition and health claims can be made. If new nutrition or health claims are made these have to be approved in advance by the [European Food Safety Agency](#) (EFSA).

**Tip:**

- For more information about [nutrition and health claims](#) refer to the website of the EU.

*Allergens* - Nuts can cause an allergic reaction in some people. Therefore, pre-packed nuts (such as peanuts, almonds, hazelnuts, walnuts, cashews, pecan nuts, Brazil nuts, pistachio nuts, macadamia nuts and Queensland nuts and products thereof) have to be labelled in such a way that it is clear to consumers that they contain allergens.

**Full overview of requirements for edible nuts and dried fruits**

For a list of requirements consult the [EU Export Helpdesk](#) where you can select your specific product code for edible nuts and dried fruits under chapter 08.

**Common requirements****Food Safety Certification as a guarantee**

As food safety is a top priority in all EU food sectors, you can expect many players to request extra guarantees from you in the form of certification. Many EU buyers (e.g. traders, food processors, retailers) require the implementation of a (HACCP-based) food safety management system. The most important food safety management systems in the EU are [BRC](#), [IFS](#), [FSSC22000](#) and [SQF](#). Different buyers may have different preferences for a certain management system, so before considering certification in line with one of these standards, you are advised to check which one is preferred (e.g. UK retailers often require BRC and IFS is more commonly required by other European retailers). All the aforementioned management systems are recognised by the [Global Food Safety Initiative \(GFSI\)](#), which means that they should be accepted by major retailers. However, in practice some buyers still have preferences for one specific management system.

**Tips:**

- EU market entry preparation is likely to include implementing a food safety management system and it is therefore important to familiarise yourself with them.
- If you plan to target one or more markets, check which specific food safety management systems are most commonly requested. In any case choose a management system that is GFSI approved.
- Read more on the different Food Safety Management Systems in the [Standards Map](#).

## Common Market Organisation

EU marketing standards for edible nuts and dried fruits are aligned with international standards, as pursued by the United Nations Economic Commission for Europe (UNECE) and Codex Alimentarius. These sources are considered 'soft law' in the EU and thus provide an important reference for exporters.

### Tips:

- See [Council Regulation \(EC\) No 1234/2007](#) and [Council Regulation \(EC\) No 361/2008](#) for more general information concerning the common organisation of agricultural markets.
- See information on the [Codex Alimentarius](#) and the [UNECE standards](#). Use the websites' search facility to find specific information on individual dried fruits.

## Corporate responsibility

EU buyers (especially large ones in western and northern EU countries) are paying increasing attention to their corporate responsibilities regarding the social and environmental impact of their business. This also affects you as a supplier. Common requirements include the signing of a suppliers' code of conduct which states that you conduct business in a responsible way, i.e. you (and your suppliers) respect local environmental and labour laws, avoid corruption etc. Furthermore, importers may also participate in initiatives such as the [Ethical Trading Initiative](#) or the [Business Social Compliance Initiative](#). These initiatives focus on improving social conditions in their members' supply chains. This implies that you, as a supplier, are also required to act in line with these principles.

### Tips:

- If you are targeting the UK market, familiarise yourself with the [ETI base code](#) to check what [ETI members](#) require from their suppliers.
- When targeting other EU markets it might be interesting to assess your company's current performance by conducting a self-assessment, which you can find on the [BSCI website](#).
- Be aware that many of the environmental and social sustainability issues take place at farm level. To test to what extent your farmers are sustainable you could ask them to fill in the [Farmer Self Assessment](#) by the Sustainable Agriculture Initiative.
- Consider defining and implementing your own code of conduct. This is not required by buyers, but may be a good way to show potential buyers your views on corporate responsibility. Refer to the [Code of Practice](#) of the Fruit Juice Association (AIJN) for inspiration. The AIJN represents a large share of the European fruit juice producers.
- Implementing a management system such as [ISO14000](#) (environmental aspects), OHSAS 18001 (occupational health and safety) or [SA 8000](#) (social conditions) is a way to address sustainability and possibly gain a competitive advantage. Research with your buyer whether this will be appreciated.

## Niche market requirements

### Fairtrade Certification:

Fairtrade products are produced with extra focus on the social conditions in the producing areas. An example is [Fair Trade](#). Having your products certified is the most far-reaching way to prove your business performance with respect to social conditions in your supply chain. After certification by an independent third party, you may put the Fair Trade logo on your product. In general, premium prices are paid for fair trade products. Although growing, the market for Fair Trade certified edible nuts and dried fruits is still a niche market.

### Tips:

- Check the Fair Trade Standards for [small producer organisations](#).
- Consult the [Standards Map database](#) for more information on the Fair Trade label.
- Before applying for one of these certificates, we advise you to check your buyers' preferences for certain national labels.

### Organic, niche market

Organic edible nuts and dried fruits are produced and processed by natural techniques. Although growing, the market is still relatively small. To market edible nuts and dried fruits in the EU as organic, they must be grown using organic production methods which are laid down in [EU legislation](#), and growing and processing facilities must be audited by an

accredited certifier. Only then may you put the EU organic logo on your products. Although there is an EU-wide system for the regulation of organic farming, well-established national and private logos can continue to be used on product labels (e.g. [Soil Association](#) in the UK, [Naturland](#) in Germany).

**Tips:**

- Implementing organic production and becoming certified can be expensive. In the current market the return on investment may not be high. On the other hand it can increase yields and improve quality.
- Check the Soil Association standard for [Food and drink](#) to get an idea of the requirements of organic production.
- Consult the [Standards Map database](#) for the different organic labels and standards.

**Rainforest Alliance**

The Rainforest Alliance (RA) standard is a mainstream sustainability scheme which focuses on environmental issues. Rainforest Alliance only certifies tropical products such as bananas, pineapple, mango, avocado, guava and citrus and different kinds of nuts. Rainforest Alliance is growing fast in the fresh fruit and vegetables market. It is not very big yet in the market for edible nuts.

**Tip:**

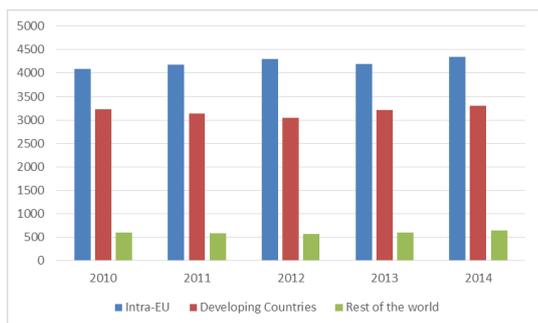
- Consult the Standards Map database for more information on the RA standard.

**Trade and Macro-Economic Statistics**

General information and figures about production and trade developments for Processed Fruit and Vegetables in the European market is provided in the [CBI Trade Statistics](#). This section provides more detailed statistics in relation to the trade, production and consumption of edible nuts and dried fruits in Europe.

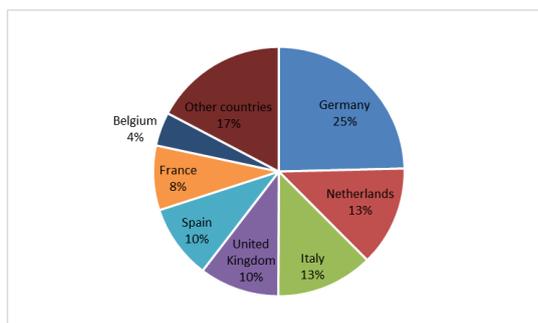
**Imports**

**Figure 1: European imports of edible nuts and dried fruits, in thousand tonnes**



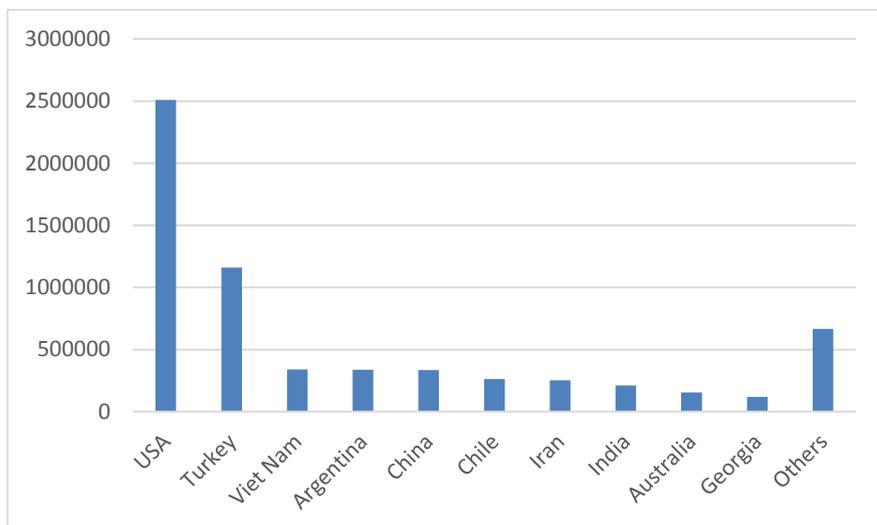
Data source: Eurostat

**Figure 2: Breakdown of the EU total import volume of edible nuts and dried fruits by importing country, 2014, in % of value**



Data source: Eurostat

Figure 3: Main external suppliers of edible nuts and dried fruit in the EU in 2014 in € thousands



Data source: Trademap

### Analysis and interpretation

Total European imports of edible nuts and dried fruits grew by 7.9% in value and 1.2% in volume, reaching €14.8 billion and 8.4 million tonnes respectively in 2014.

The main reason for the slower growth in volume than growth in value, which is reflected in an increase in prices, is a general lack of the products on the EU market in recent years due to lower harvests and partially because of exporters' focus on other growing markets such as BRIC countries (Brazil, Russia, India and China).

The EU market for dried fruit and edible nuts is concentrated and the three major importers (Germany, the Netherlands and Italy) have a 50% share of total EU imports. The UK is the largest importer of dried fruit (Refer to CBI [Product Factsheet Dried Fruits in the UK](#))

Within the EU the countries with the highest import growth of edible nuts and dried fruit in the last five years were: Latvia (16%), Slovakia (16%), Finland (15%), Romania (15%) and Lithuania (15%).

Almonds have the highest value of imports with a 22% share, followed by hazelnuts (11%), groundnuts (9%), cashew nuts (9%) and dried grapes (8%).

The highest growth in import value in the last few years has been in chestnuts, hazelnuts, almonds, dried tropical fruit (and superfruit) and macadamia nuts.

Nearly 60% of all EU import value is from the USA (mainly almonds, walnuts and dried cranberries) and Turkey (mainly hazelnuts, dried grapes and dried apricots).

In the range of the first 30 exporters of edible nuts and dried fruit to the EU, the highest export growth in the last few years has been recorded in Australia (almonds), Georgia (hazelnuts), Ukraine (walnuts), USA (almonds), Bolivia (Brazil nuts) and Chile (prunes).

The major intra-EU imports involve both re-exports (e.g. peanuts from the Netherlands), as well as a country's own production (e.g. almonds in Spain).

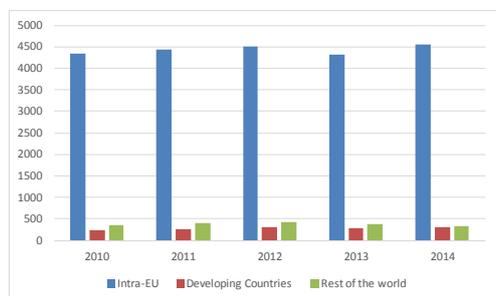
The main trading companies in Europe are [Rhumveld, Winter & Konijn](#), [Barrow, Lane & Ballard Ltd.](#), [C.G. Hacking & Sons](#), and [Amberwood Trading](#).

### Tips:

- In targeting your markets, make a distinction between countries that import edible nuts and dried fruits for their own consumption and countries that import products and re-export them to other countries. In the first category, more attention should be paid to developments in retailing and consumption in the importing country.
- Identify who are the biggest net importers, serving their domestic markets. In mature markets, market share could be gained by offering products in niche markets.
- Beside the European Union you can diversify your export to BRIC countries.
- Consider countries that are seeing growth in imports for entering the market with edible nuts and dried fruits.
- Try to involve European experts in setting up your business. The CBI or the Netherlands senior experts-network PUM could help with the implementation of many business aspects. See the websites: [www.cbi.eu](http://www.cbi.eu) or [www.pum.nl](http://www.pum.nl).
- Find a reliable intermediary or importer who can sell your products to the larger industries at a good price. In this context, it is worth exploring the possibilities of long term contracts to secure sales.
- Learn from DC exporters who are gaining share on the EU market.
- Get information from your contact person in the EU about quality standards, safety requirements (aflatoxins!), delivery schedules and logistics requirements.
- More information about EU import requirements can be found on the websites of [CBI](http://www.cbi.eu) and the European Commission's [Export Helpdesk](http://ec.europa.eu/trade/export_helpdesk/).
- Evaluate whether working capital, hygienic practices, processing technologies, logistics and the skill levels of your company employees are able to keep up with these requirements.

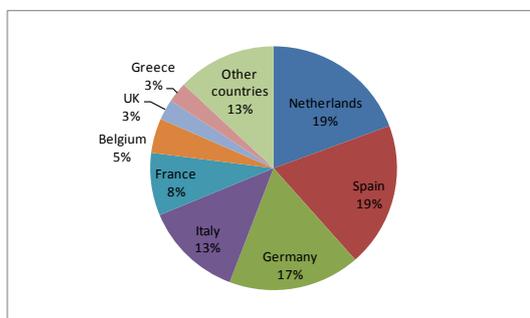
## Exports

**Figure 3: European exports of edible nuts and dried fruits, in thousand tonnes**



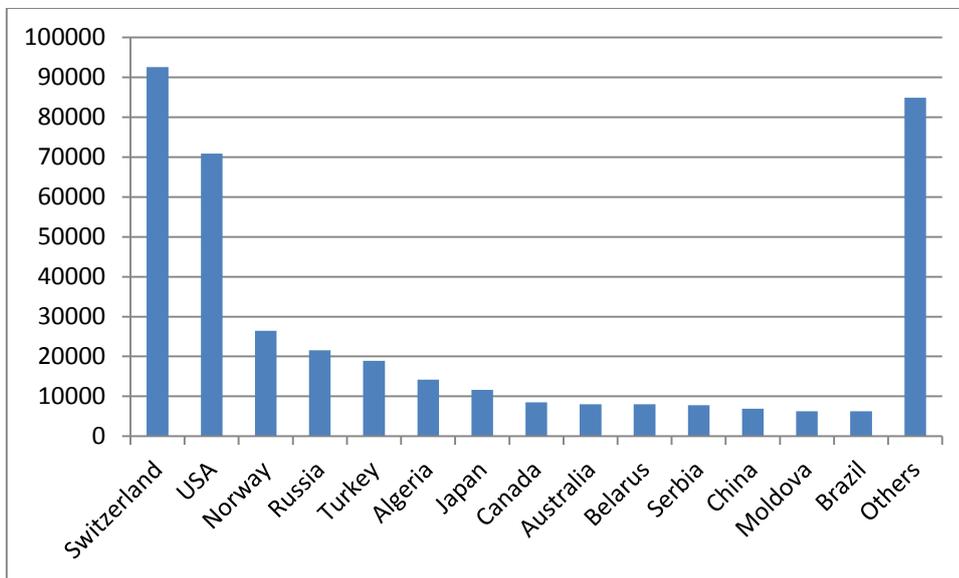
Data source: Eurostat

**Figure 4: Division of export value of edible nuts and dried fruits of EU countries, in 2014**



Data source: Eurostat

**Figure 3: Main external export destinations of edible nuts and dried fruit from the EU in 2014 in € thousands**



Data source: Trademap

### Analysis and interpretation

In terms of value, European exports (including intra-EU trade) of edible nuts and dried fruits since 2010 grew by 6.5% and reached €7.6 billion in 2014. In quantity, exports grew by 1.2% and reached 5.2 million tonnes.

About 90% of all European exports are intra-EU and EFTA exports

Exports are highly concentrated and the three largest export countries (the Netherlands, Spain and Germany) account for 55% of total exports. The Netherlands and Germany are re-exporting destinations. More than 50% of Dutch (re)exports are represented by groundnuts and cashew nuts. Germany (re)exports almonds. Spain's top export products are almonds.

In the last five years the highest export growth was in Slovenia, represented by re-exports of prunes imported from Serbia. Scandinavian and Eastern European countries showed high export growth too.

The main external export destination in 2014 was Switzerland, followed by the USA, Norway and Russia. This was different from 2013 because the USA increased its export share while Russia's share decreased (the Russian embargo may be one of the reasons for this market change).

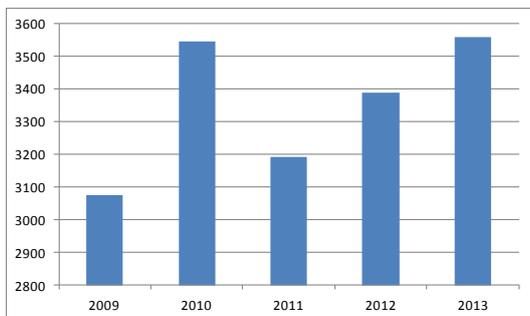
In the range of the largest EU export destinations, the highest increase in exports from the EU in the last five years was to China (mainly walnuts from Romania), Egypt (mainly almonds from Spain), the USA (mainly almonds from Spain) and Israel (mainly candied fruit from Greece and walnuts from Romania).

#### Tips:

- The Netherlands is one of the largest European trade-hubs for edible nuts and dried fruits in Europe. You may find your importer there and supply Europe with one partner.
- Algeria, USA, Russia and the Baltic States are growing destination markets for the EU. Explore the potential for exporting to these countries directly.
- More information on promising EU growth markets can be found on the websites of European associations [FRUCOM](#) and [INC](#) as well as in the [CBI Tailored Market Intelligence](#) database.
- Learn more about the EU competition and its approach to the markets where EU is gaining market share.

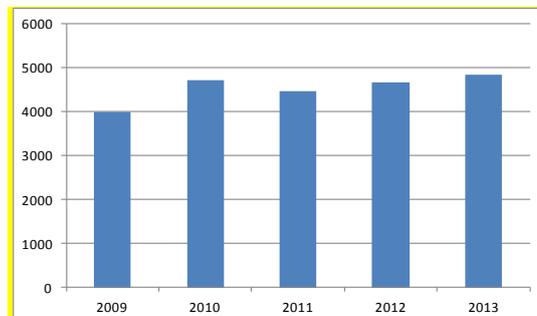
## Production

**Figure 5: European total production of edible nuts and dried fruits, 2009-2013, in million euros**



Data source: PRODCOM Eurostat

**Figure 7: European (apparent) consumption of edible nuts and dried fruits, 2009-2013, in million euros**



Data source: PRODCOM

NB. Note that the figures above display the production of manufactured goods, which include intermediate goods as well as final goods.<sup>1</sup> 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.

## Analysis and interpretation

Between 2009 and 2013, production of edible nuts and dried fruits was fluctuating, especially in the first two years, but it showed an increasing trend in the last three years, reaching around €3.5 billion – a level similar to that in 2010.

The EU produces more edible nuts than dried fruits. Production of nuts in 2013 was 72% (€2.4 billion) and production of dried fruit was 28% (€0.9 billion).

Spain, the Netherlands, the United Kingdom and Italy are major countries in the production of (processed) edible nuts and dried fruits. However, this includes processing (repacking) and in some cases roasting of imported products. In terms of primary production (harvesting and drying) the largest EU producers are Spain, Italy, France and Greece.

Spain is the world's third largest producer of almonds and the fifth largest producer of dried figs. Italy is the world's second largest producer of hazelnuts and the sixth largest producer of dried figs. Greece is the fourth largest producer of dried figs and the ninth largest producer of dried grapes. France is the third largest producer of prunes and the world's seventh largest producer of walnuts. Portugal is an important producer of dried figs too. The Netherlands and the United Kingdom are large processors of imported nuts (especially peanuts).

Imported nuts and dried fruits are widely used by the confectionery, baking, and sweets industries for further processing. Key manufacturers operating in the European edible nuts and dried fruits market include: [Intersnack \(Jack Klijn\)](#), [Unilever \(Calve\)](#), [PepsiCo \(Duyvis and Lay's\)](#), [Mars](#),

Some of the production (processing) country leaders are: [CG Hacking & Sons \(UK\)](#), [V. Besana \(Italy\)](#), [Borges \(Spain\)](#), [Bosch Boden Spies \(Germany\)](#), [Seeberger \(Germany\)](#), [Voicevale \(UK\)](#), [Mariani Packing \(USA based but spreading sales to Europe\)](#)

### Tips:

- Nuts and dried fruits are good candidates for marketing as "added value products". They have an excellent potential in the West for the health food market.
  - Differentiate your products based on processing methods, like roasting, salting, etc.
  - Try to find matching market niches for your products.
  - Introduce new, innovative products, new flavours or new combinations of flavours.
- More information on the production of edible nuts and dried fruits in Europe can be found on the websites of [FRUCOM](#) and [INC](#).

<sup>1</sup> In the case of edible nuts and dried fruits, intermediate (manufactured) goods can be nuts or edible fruits that are used as food ingredients, whereas final (manufactured) goods are products in which nuts or dried fruits are processed, such as biscuits, chocolate bars, etc.

## Consumption

### Analysis and interpretation

Apparent consumption of edible nuts and dried fruits shows an increase, especially in the last three years. Stimulated by a continuous trend towards healthier lifestyles, it is expected that European consumers will increasingly appreciate edible nuts and dried fruits.

In terms of value, apparent consumption increased from €4 billion in 2009 to €4.8 billion in 2012.

More detailed statistics on consumption for specific types of nuts and dried fruits by specific countries can be found on the website of the International Nut & Dried Fruit Council (INC).

Nuts are either consumed directly ('cocktail nuts') or in processed form, as food ingredients in the confectionery and bakery industry. Just like nuts, dried fruits can be consumed directly as a snack, but they can also be further processed in sauces, soups, marinades, garnishes, puddings, and food for infants and children.

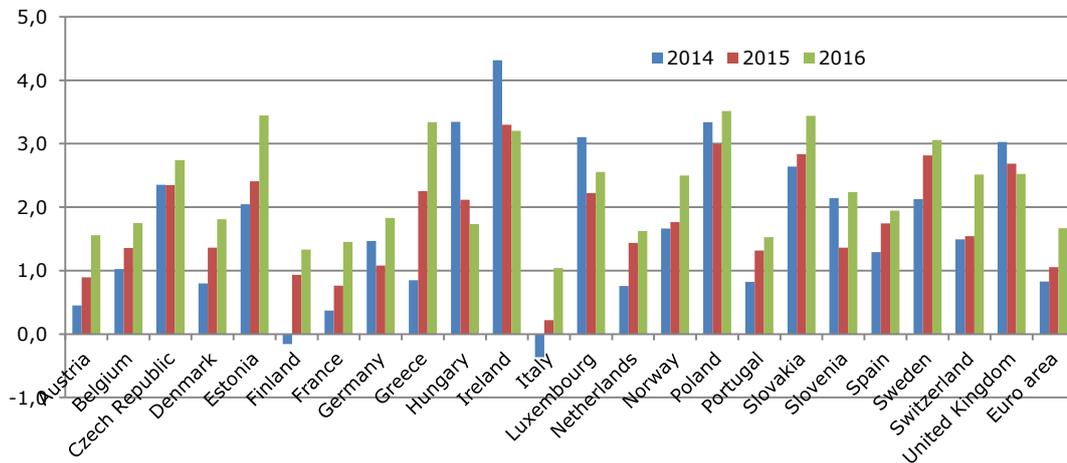
More information on consumption trends can be found in the next section (Market trends).

#### Tips:

- Check the [Global Statistical Review](#) on the website of [International Nut & Dried Fruit Council \(INC\)](#) for consumption statistics for specific types of nuts and dried fruits in specific (European) countries.
- Explore the main trade channels, retailer requirements and consumer preferences in growing consumer markets in Europe.
- Use the opportunity to take a share in the increasing consumption of dried fruit and edible nuts as healthy snacks throughout Europe by stronger marketing of your products.

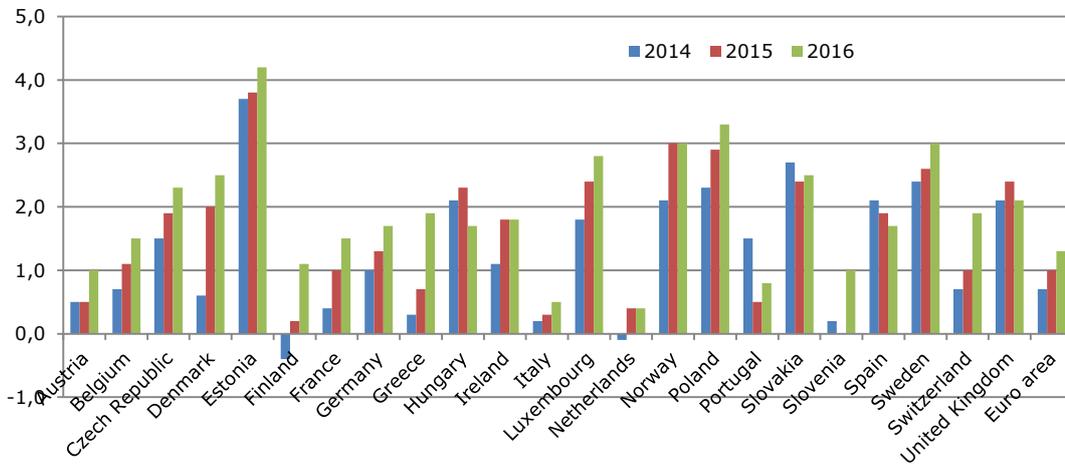
## Macro-economic statistics

Figure 10: Real GDP, 2014-2016, % change from previous year



Source: Eurostat (2015)

**Figure 11: Real private consumption expenditure, 2014-2016, % change from previous year**



Source: Eurostat (2015)

### Economic indicators are promising

Predictions of GDP and private consumption expenditure are important indicators for the European edible nuts and dried fruit market.

Between 2014 and 2016, European GDP and private consumption expenditures are expected to increase. This means that consumption of edible nuts and dried fruit, particularly exotic and healthy products, is likely to rise. Especially in emerging markets, an increase in GDP creates room for this type of spending. Due to saturation, growth in consumption will be moderate for mature markets.

#### Tip:

- Monitor GDP, private consumption expenditure and the housing market, because when these are positive, expenditure on "healthy snacks" is expected to increase.

### Market trends

[CBI Trend Mapping](#) provides you with general trends in the European market for processed fruits and vegetables. This section provides more details about specific trends in the market for edible nuts and dried fruits.

#### Social and health market drivers:

In Europe, a combination of increasing time-pressures, a faster pace of life, and a need for convenience because of smaller households, has driven consumer demand for snack products that are wholesome and deliver sustainable energy.

In addition, increasing health consciousness has led to consumers trading their sweets and biscuits for healthier snack products. Nuts and dried fruits have an excellent market opportunity to fulfil these needs.

On the other hand, the number of consumers with food allergies or intolerances is also growing, leaving nuts in a less favourable position.

#### Tips:

- Take the consumer health trend into account in your marketing efforts. Nuts contain a lot of fibre, minerals, unsaturated fatty acids and antioxidants. In addition, there is scientific evidence supporting the beneficial effects of nuts on cardiovascular and other health issues. The health effects of dried fruits can also be demonstrated. Link your product to these effects.
- More information on the health effects of nuts can be found on the website of the [Internal Nut and Dried Fruit Council \(INC\)](#).
- Pay attention to the increasing number of food allergies by introducing allergy-friendly products or clear product labelling.

### Environmental market drivers:

More consumers are gaining an awareness of environmental issues, i.e. they require organic, pesticide free, or ecologically responsible products.

#### Tips:

- Consider certification and sustainability labelling for your products (see also the Tips under Non-legislative requirements).
- Tell your story behind the product and its added value through promotion and labelling. Cooperate with the food industry and retail.
- Use the health trend in your product innovation, e.g. reduce the amount of salt in your products.
- Furthermore, focus your innovation efforts on introducing new flavours or new snack products that target different consumer groups or consumption occasions.
- The best way to enter new Eastern European markets is through importers in Western Europe who have expanded their businesses into Eastern European markets.

### Economic and technological market drivers:

Innovation will continue to be crucial for manufacturers in order to stay ahead of the competition. The industry is innovating with new flavours, new textures and new packages.

Eastern European markets in particular are experiencing rapid growth which is expected to continue in the years ahead. Consumers are very price conscious and some processed fruit and vegetable products are relatively new to consumers in these countries.

## Market Channels and Segments

With respect to Edible Nuts and Dried Fruits, an extensive study about market channels and segments in the EU market is already available. See the [CBI Market Channels and Segments for Edible Nuts and Dried Fruits and Top 10 Tips](#).

## Market competitiveness

With respect to Edible Nuts and Dried Fruits, an extensive study about market competitiveness in the EU market is already available. See the [CBI Market Competitiveness for Edible Nuts and Dried Fruits](#).

## Useful sources

Export and market entry support:

<http://www.cbi.eu/>

<http://exporthelp.europa.eu/thdapp/index.htm>

Certification schemes:

<http://www.isealalliance.org/>

<http://www.standardsmap.org/identify.aspx>

Marketing and trade standards:

<http://www.unece.org/trade/agr/standard/dry/ddp-standards.html>

<http://www.codexalimentarius.org/codex-home/en/>

Statistics and sector information:

<http://www.profel-europe.eu/>

<http://faostat.fao.org/>

<http://ec.europa.eu/eurostat>

<http://comtrade.un.org/>



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November 2015