

MARKET PROFILE



Market profile

Frozen fruit puree from
Madagascar for the European
market



Subject of the study:	Frozen fruit purée (lychee, pineapple, passion fruit, soursop, guava, etc.) for the European and international market.
Date:	July 2021



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COLEACP's mission is to develop an inclusive and sustainable trade in fruit and vegetables and food products, focusing on ACP countries' trade with each other and with the European Union.

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I. SUMMARY

This market profile assesses the European and international market for frozen fruit purée. This report mentions some of the players in the frozen fruit purée market. More details on other main players within the local market can be requested from COLEACP.

The processing of fruit into (frozen) purée creates added value and helps to limit the waste of fresh fruit, especially by making use of sorting rejects.

Little data is available for the specific market segment of fruit purées and even less for frozen fruit purées. However, international and European consumption trends, as well as the mainly professional use of fruit purées, suggest that the market for frozen fruit purées will develop in a similar way to that for fresh purées.

Both markets have good development potential, especially for banana and other exotic fruit purées. The European demand for (frozen) exotic fruit purée is particularly interesting for Malagasy producers. However, the European market imposes demanding production and health standards.

II. SUPPLY

This section contains a description of chilled and frozen fruit purée, as well as the existing preparation methods. Then the global and local market for this product is studied.

a. Product presentation

Frozen fruit purée is the result of a two-step process of processing fresh fruit:

- The first step consists of transforming the fresh fruit into a purée. The term “pulp” is sometimes used to describe this product obtained by sieving, crushing or grinding the edible part of the fruit, which may have been previously peeled and/or cooked. “Concentrated purée” is when the water naturally contained in the fruit is physically removed. Fruit purées can be completely smooth or contain chunks. They can also be seasoned or even cooked, for example by adding sugar or lemon juice.

- i. Once the fruit purée has been produced, it can be frozen and thus stored for several months (the storage time depends on the method of freezing).

Fruit purées vary in composition: fruits used and/or combined, sugar added, organic production, etc. It is a **very segmented market**, as it is dominated by certain fruits. **Bananas** are the fruit in most demand in puréed form, followed by **apples**. **Exotic fruits** also hold a significant share of the concentrated fruit purée industry, particularly mango, followed by pineapple. Since freezing can alter the nutritional qualities of the processed fruit, it is very important that the purée is made from good quality fruit. However, the fruit used for the production of purées can also be sorting rejects that cannot be used fresh if their quality allows it. Technology, such as de-aeration processes for purées or heat treatment by ohmic heating, allows the quality of the fruit to be maintained despite freezing. De-aerating the purée before freezing prevents the product from

oxidising, while thermal heating ensures that the organoleptic qualities (flavour, colour, texture) of the fresh fruit are retained. Sterilisation or pasteurisation are other processes for preserving processed fruit and vegetables, but they alter the quality and colour of frozen fruit purées to a greater extent.

In addition, chilled fruit purées are a strong alternative to frozen purées as they combine convenience and preservation of fruit flavour without the need for the negative cold supply chain.

The difference between chilled and frozen purées lies in their method and duration of storage: frozen purées can be stored for up to 30 months at -18°C , whereas chilled purées can be stored for between 6 and 12 months depending on the fruit concerned, at a temperature ranging from $+2$ to $+6^{\circ}\text{C}$.

b. The global supply of fruit purées

The global market for fruit purées is highly competitive and includes major companies such as China Kunyu Industrial Co., Dennick FruitSource, LLC; Döhler, Grünewald GmbH, or Freshcut S.L.

There are also several European producers of frozen fruit purées. Many process imported fruit in Europe, especially exotic fruit. The French company Ponthier imports fruit from Madagascar to make frozen purées from soursop, guava, lychee and papaya. Guavas and lychees are also processed into chilled purées. Many other European manufacturers produce organic frozen fruit purées, such as the Dutch company Polproduct B.V. and the French companies Sicoly and Andros Chef.

The fruit purée market is one for which there is **little data on production volumes**. According to several interviews with companies consuming fruit purées¹, the main countries producing exotic fruit purées in the world are:

- India, mainly for mangos and bananas,

- Ecuador, mainly for bananas,
- Costa Rica and Nicaragua for pineapples,
- China, for all exotic and non-exotic fruits,
- Thailand, Vietnam and Brazil for exotic fruits in general (including lychees, passion fruit, papayas, guavas, etc.).

In Madagascar, MPE (Madagascar Premium Exotica) specialises in the production of frozen fruit purée. This company, created in 2014 by the Scrimad Group, processes tamarinds, mangoes, passion fruit, pineapples, lychees and guavas into frozen unsweetened purée, as well as juice. These frozen purées and juices are certified Organic, Fairtrade and GLOBALG.A.P. and exported to 11 countries worldwide, mainly to the French trading partner Ethiquable. Another Malagasy company in this sector is HavaMad, which specialises in the design, processing and marketing of organic fruit juices and purées, and was created in 2013.

Another player in the region is the Reunion Island company EdenFruit, which produces exotic fruit purées (Victoria pineapple, mango, banana, lychee, guava, passion fruit, papaya) without added sugar, exclusively for professionals.



¹ The following companies: Agrana, Andros, Sicoly, JFA - LSDH, Naturex, Materne, Astier Demarest.

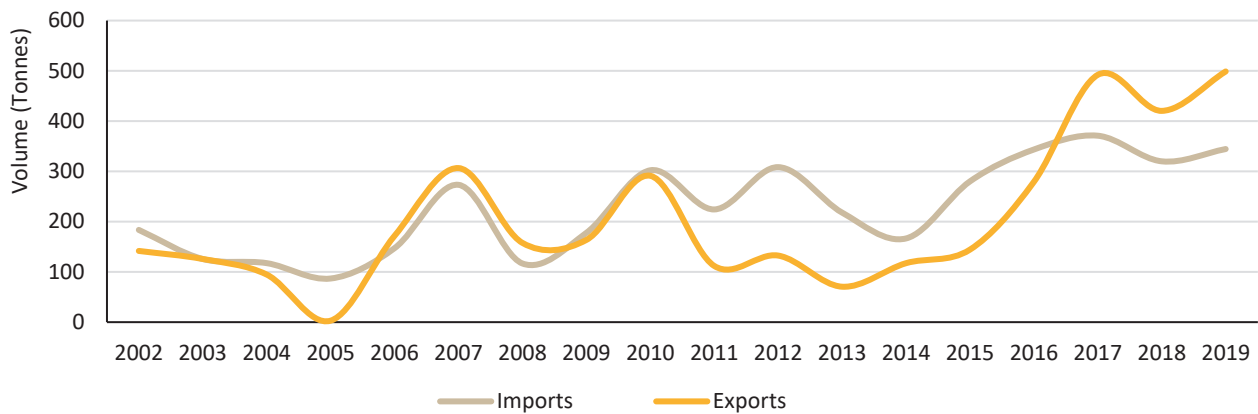


Figure 1: Imports and exports of fruit and nut compotes, marmalades and purées by Madagascar in tonnes. Source: COLEACP from own data and data based on UN-Comtrade, IFPRI, Eurostat, FAOSTAT and national statistics

c. The Malagasy fruit purée market

As of 2017, Madagascar exports more fruit compotes, jellies, marmalades and purées than it imports. It is important to note that the data presented in the graphs do not consider products destined directly for retail but rather products destined for business-to-business trade.

This overall trend is recent, with Madagascar importing more fruit compotes, jellies, marmalades and purées than it exported until 2016. Recently, Malagasy exports to the international market have intensified from 2015 onwards.

Madagascar’s main trading partner for imports and exports of fruit purées is France.

South Africa, the Netherlands and Mauritius are other significant importers of fruit purée from Madagascar while South Africa, Egypt and France are the three main exporters of fruit purée to Madagascar.

i. Imports

Jams and purées are among the ten most imported processed fruit, nut and vegetable products to Madagascar. Within this product category, their volume remains relatively low compared to other goods.

The trend in fruit purée imports is increasing from 2008 to 2019, with an average cumulative annual growth rate of 10% per year. This can be explained by an

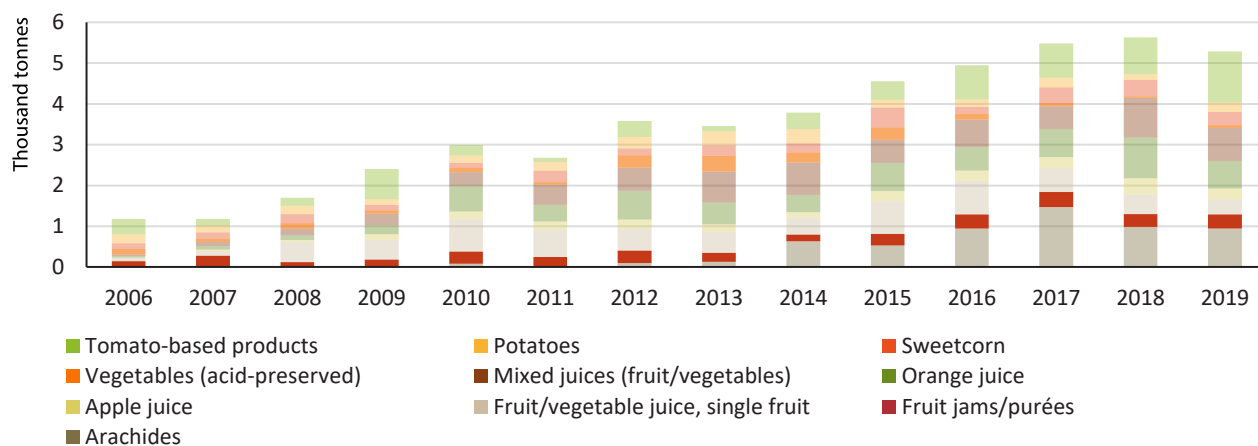


Figure 2: Trends in imports of the top 10 processed fruits, nuts and vegetables from Madagascar (all shades of colour) and fruit jams/purées (dark red), in thousands of tonnes. Source: COLEACP based on cfr Figure 1

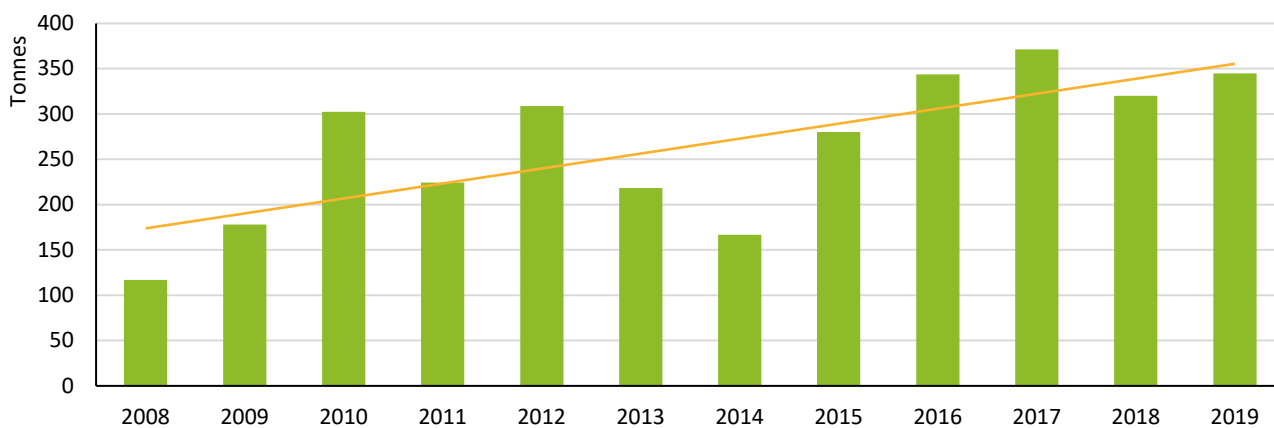


Figure 3: Evolution of Madagascar's imports of fruit jams/purées (in tonnes). The linear trend is represented by the orange line. Source: COLEACP based on cfr Figure 1

increase in consumption, by the growth of the Malagasy economy (+4.6% in 2018) or by Malagasy population growth (+2.5% in 2018).

Data on imports of frozen fruit purée are also available, recorded under the customs code HS 200799. These are 'Jams, jellies, marmalades, fruit purées and fruit pastes,

obtained by cooking, whether or not containing added sugar or other sweeteners (excluding homogenised preparations of HS 200710, and citrus jams, jellies, marmalades, purées and pastes)'. The main source of imports is **Egypt** with about 50% of the market share, followed by France (about 20%).

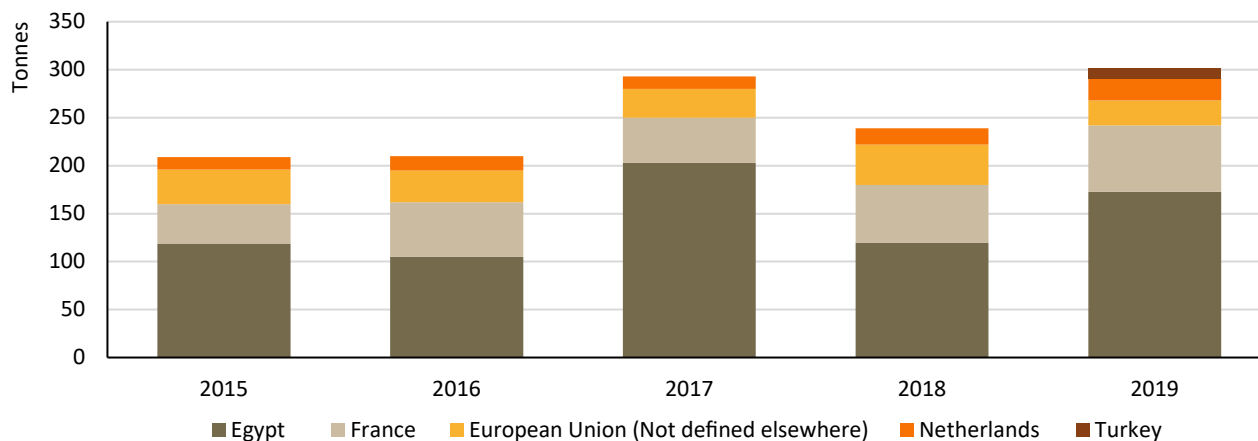
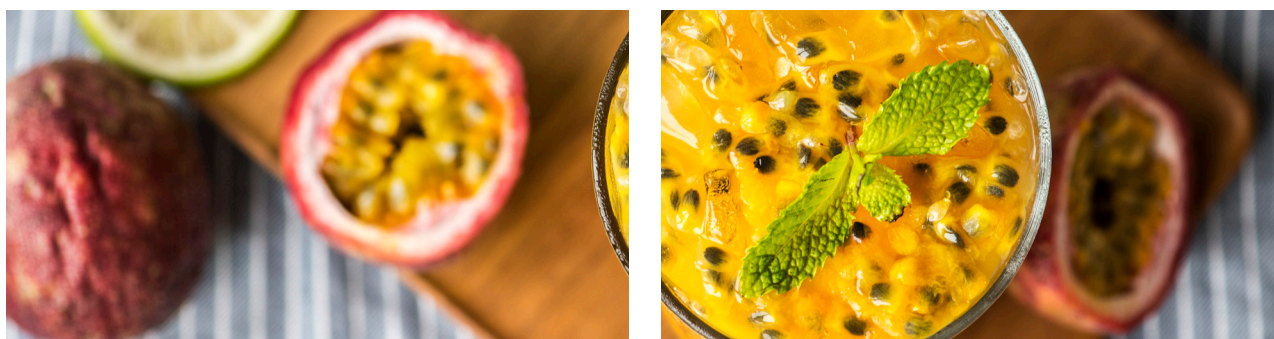


Figure 4: Evolution of Malagasy imports of frozen fruit purée (HS 200799) by country of origin (in tonnes). Source: COLEACP based on cfr Figure 1

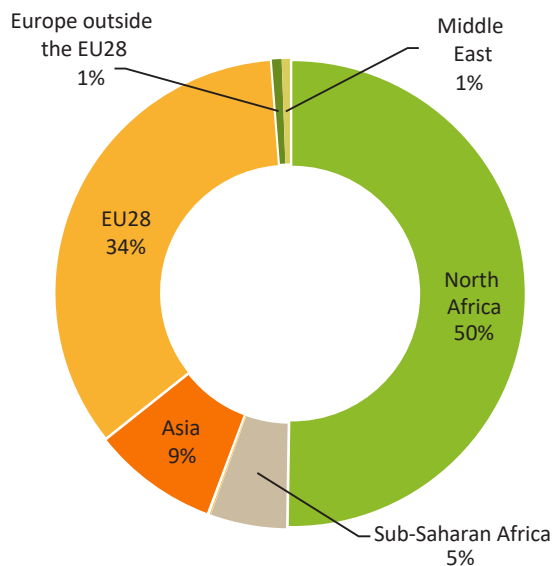


Figure 5: Distribution of jam/purée import volumes by world region, accumulated volume (2008 to 2019). Source: COLEACP based on cfr Figure 1

For the period from 2008 to 2018, it can be observed that imports of jams and purées to Madagascar come mainly from **North Africa** and the **EU**, although the ratios fluctuate depending on the year.

ii. Exports

As with imports, Madagascar’s exports of jam and purée are lower than those of other processed fruit and vegetable products.

The quantities of fruit compotes, jellies, marmalades and purées produced in Madagascar and exported **have increased sharply** since 2013 after a relatively stable period. This increase can be explained, in part, by the arrival of new industrial players on the Malagasy market. These include the aforementioned HavaMad. MPE also started its fruit purée business in 2015.

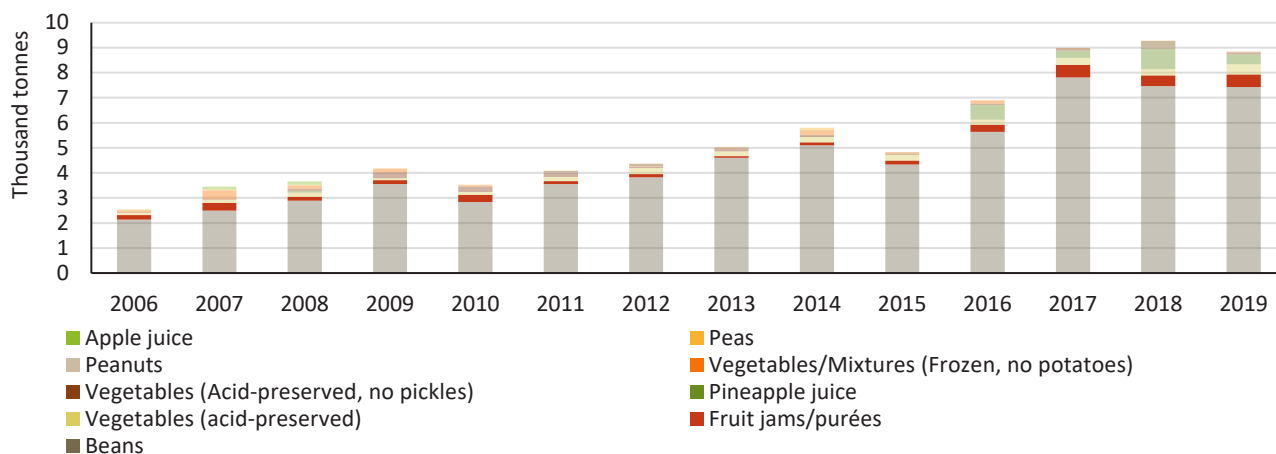


Figure 6: Trends in exports of the top 10 processed fruits, nuts and vegetables from Madagascar (all shades of colour) and fruit jams/purées (dark red), in thousands of tonnes. Source: COLEACP based on cfr Figure 1

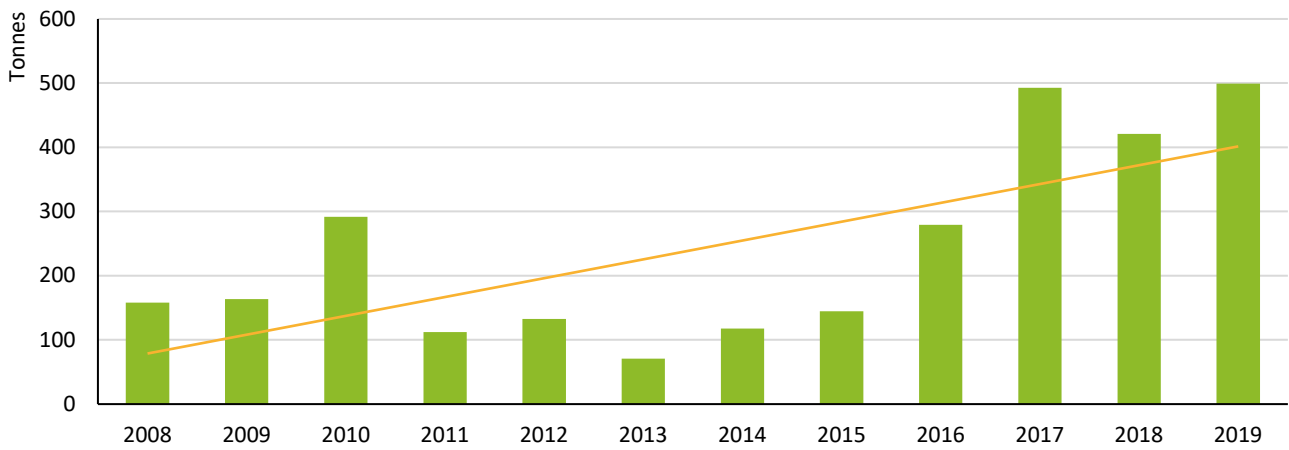


Figure 7: Evolution of Madagascar's exports of fruit jams/purées (in tonnes). The linear trend is represented by the orange line. Source: COLEACP based on cfr Figure 1

As with imports, further statistics on Madagascar's exports of products registered under the HS 200799 customs code are available. The main importer of these products from Madagascar is **France** with, in 2019, 42% of market share. Exports to the Netherlands and Mauritius are, however, on the rise. This data reflects a very clear increase in Malagasy exports of

frozen fruit purée over the last five years. The start-up of industrial units such as HavaMad and MPE explains this dynamic, although they do not produce exactly the same products.

Havamad's production unit is located in Antananarivo. HavaMad has a processing capacity of 50 tons of fruit per day and

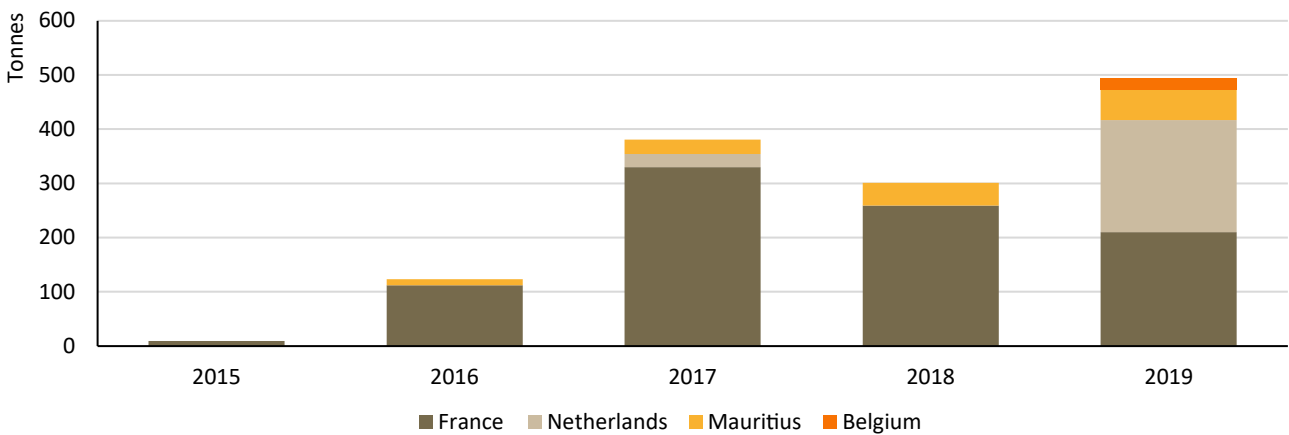


Figure 8: Evolution of Malagasy exports of frozen fruit purée (200799) by destination market (in tonnes). Source: COLEACP based on cfr Figure 1

produces aseptic organic fruit juices and purees, packaged in 210L drums and finished products (1L, 75CL and 25CL bottles), most of which are destined for export to Europe. HavaMad’s main products are pineapple, mango, lychee and passion fruit. Mango is the most important product exported as purée. Sanitised purée remains a less premium product than frozen fruit purée because of the heat treatment which further degrades the nutritional and organoleptic quality.

Initially, Madagascar exported jams to different regions of the world. Since 2015, the EU has become the main destination for Madagascar’s jam and purée exports. The island brings together several processing units to obtain high quality products. This niche is the only really feasible one for Malagasy producers and processors because of the high transport costs. The Asian market has recently emerged as an alternative destination for these high-end purées and jams.

In 2019, the largest importer of fruit jams

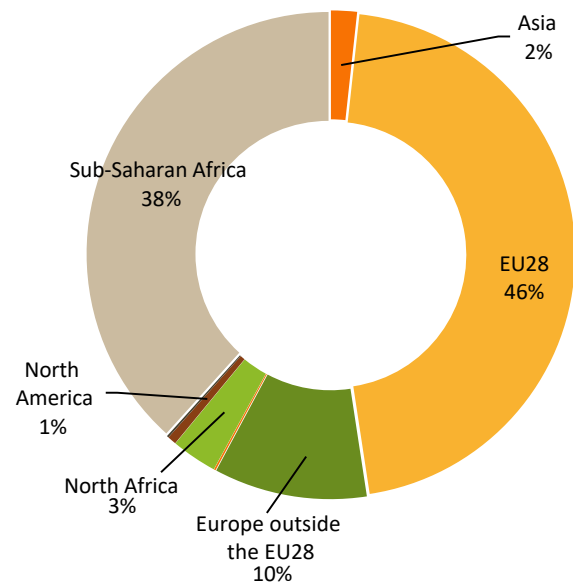


Figure 9: Distribution of jam/purée export volumes by world region (2018). Source: COLEACP based on cfr Figure 1

and purées from Madagascar was **France**, followed by **The Netherlands** and **Mauritius**.

Similar to the trend in trade flows between Madagascar and the international market, Madagascar exports more jams, fruit jellies, marmalades, purées and fruit pastes to the EU than it imports.

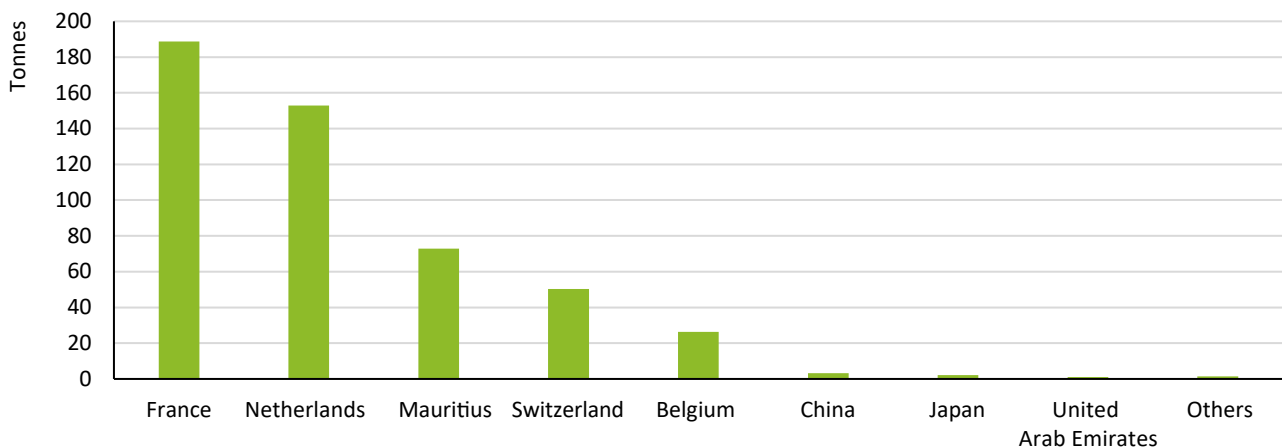


Figure 10: Largest importers of fruit jams/purées from Madagascar in 2019. Source: COLEACP based on cfr Figure 1

In 2020, the **volume** of Madagascar's exports of jams, fruit jellies, marmalades, purées and fruit pastes to the was four times higher than its imports.

Finally, exports of jams, fruit jellies, marmalades, purées and fruit pastes from Madagascar to the EU experienced **significant growth** between 2015 and 2019. In 2020, stabilisation seems to be taking place.

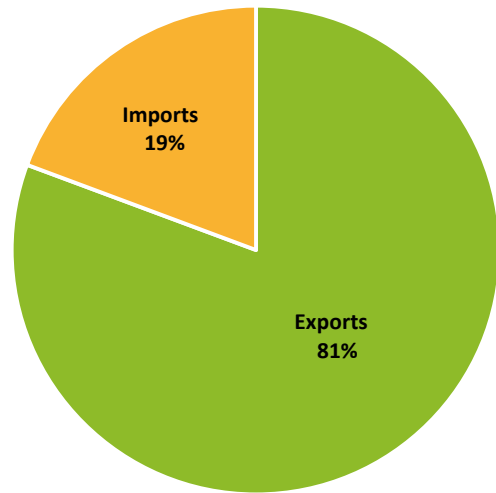


Figure 11: Distribution of Madagascar's imports and exports of fruit jams/purées from/to the EU28 in terms of volume for 2020. Source: COLEACP based on cfr Figure 1

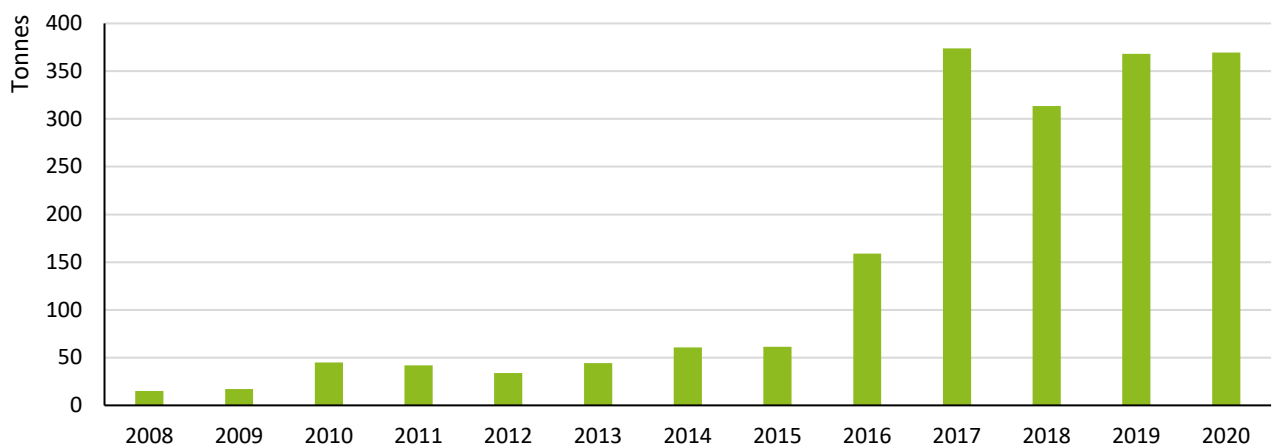


Figure 12: Evolution of Madagascar's exports of fruit jams/pastes to the EU28 (in tonnes). Source: COLEACP based on cfr Figure 1

III. DEMAND

Fruit purées (frozen) are mainly destined for the food industry, as they are used in the manufacture of ice creams, sorbets, mousses, desserts, jams, juices or cocktails. In 2019, 30% of fruit purée (frozen or not) was used to produce fruit juice. It can also be sold directly to consumers.

The packaging depends on the recipient of the frozen purées: packed in tubs of several kilos when sold to professionals, or packed in smaller containers (pots) if they are intended for consumers.

The market for fruit purées (frozen or not) has significant growth potential. In 2019, the global market value reached USD 3.86 billion. Its compound annual growth rate (CAGR) is estimated at 6% for the period from 2020 to 2027. Several factors explain this growth.

On the one hand, societal and consumer changes are driving the demand for fruit purées: fruit purées are **ready-to-eat** products and thus respond to the active and nomadic lifestyle of an ever-growing section of the population. In this context, working parents also favour ready-made fruit purées for **feeding their young children** to save time. In general, consumers are placing more and more importance on their **health** and **well-being**, thus favouring a healthy diet of fruit and vegetables. The demand for products from **organic farming**, including fruit purées, is also increasing.

On the other hand, the growth of the fruit purée market is partly due to the increase in demand for frozen products: the long shelf

life of frozen purées offers more flexibility in their consumption.

In 2019, purées (frozen or not) of **bananas** and **other exotic** fruits (mangoes, pineapples, papayas, guavas) were the segment that generated the highest value (35%) in the fruit purée sector. Banana and **mango** purées are used significantly in the production of juices, smoothies, pastries, in the dairy industry (yoghurt) and food for children².

The **lemon** purée segment is estimated to see its fastest growth rate between 2020 and 2027. This growth is mainly driven by the increasing global consumption of lemon juice and orange juice (to which lemon is often added). Lemon purée can also be used in the production of other beverages (beer, soda or even wine), but also as a naturally occurring preservative (citric acid).

The demand from the **Asian** market has the greatest potential for development and is



2 CBI - The European market potential for mango puree (2021)

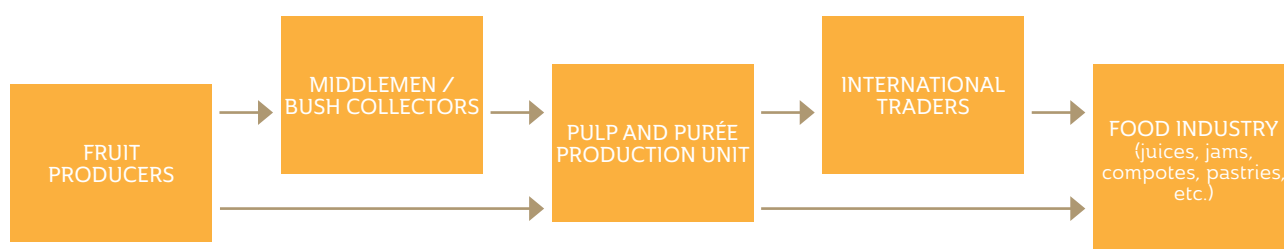
mainly due to the growing consumption of smoothies and baby food, as well as industrially processed products made from fruit purée (yoghurts, sauces, ice creams, etc.). However, access to the Asian market is

limited for exporters of fruit purée: the raw material for the production of fruit purées comes largely from the region, China being a major producer of bananas and mangoes.

IV. MARKET

a. Organisation of the sector

The production chain for fruit pulp and purée in Madagascar is organised as shown in the following diagram:



b. Marketing mix (price, product, promotion)

The price of fruit purée and pulp on the international market varies according to several factors:

- The type of fruit (e.g. apple, mango, lychee, etc.)
- The variety of fruit (e.g. for mango: Kent, Amelie, etc.)
- The country or region of origin: some origins have labels (Terroir, PDO, PGI, etc.) or have a better reputation on the international market (e.g. Madagascar lychees)
- Quality labels: Organic farming, Fairtrade, etc.
- Packaging: frozen, refrigerated, or aseptic at room temperature.
 - Frozen purée is more valuable because the packaging process does not include heating/cooking which cause the nutritional and

organoleptic properties of the product to deteriorate, but it is more restrictive in terms of logistics since a negative cold chain is required from the place of production to the place of use. The arrival price at the port in Europe is between €1.50 and €2.00/kg according to several suppliers of raw materials for the fruit industry (Naturex, Astier-Demarest, Ravifruit).

Frozen purée can be kept for 12 to 30 months, depending on the producer. Once defrosted and opened, it can be consumed within a maximum of 2 weeks, depending on the product.

- Refrigerated purée has the advantage of being easier to transport, not requiring a constant cold chain, and can still be stored, unopened, for up to 6 months to 1 year after production, for most of the

products studied. After opening, the purée can be stored for 5 to 12 days.

- Aseptic purée is generally packaged in 210 L drums. Its price is about half that of frozen purée, between €600 and €1000 per tonne depending on the product and its origin.
- The target audience: sales to individuals and end consumers in small packages, and to companies in larger packages. Possibilities range from individual packages to large containers of several tens of kilos. In addition, it seems that, in general, chilled products are sold in smaller quantities than frozen products.



The following is a list of examples of different existing frozen, chilled and aseptic fruit purées and their packaging.

FROZEN FRUIT PURÉES



Frozen mango purée

Sold on Amazon in the USA.

Individual packs, 1 pack = 2 pieces of fruit. Sold as 20 packs minimum. \$40 (€33.30) for 1.8kg in total.

The company offers other fruits in the same format. Ability to buy in large quantities.

Keeps for 6 months in the freezer.

Source : [Amazon US](#)



Frozen guava purée

Sold by Les vergers Boiron on their on-line site.

1kg tub for about €9.50.

You have to go through a local sales manager to get a more precise purchase proposal.

Large variety of fruit offered by the company.

Sugar added. Used for all preparations in the kitchen.

Source: Les vergers Boiron



Frozen lychee purée

Sold by Ravifruit, a French company.

1 kg, 5 kg or 20 kg tubs.

Aimed at professionals, so little information on prices.

The company also offers frozen compotes, purée with fruit pieces.

Keeps for 2 years in the freezer.

Source : [Ravifruit](#)



Frozen pineapple purée

Sold by Maison Ponthier. As the company is very selective, there is little information on product prices and distribution.

20 kg tub, intended for professionals.

The company offers other formats, such as refrigerated product in 1 kg and 2.5 kg bags, and frozen product in 1 kg, 5 kg and 20 kg quantities, but not for all fruits.

30-month shelf life from production.

Source : [Ponthier](#)

CHILLED FRUIT PURÉES



Chilled pineapple purée

Sold in the US by Canoa (a US-based company), on its own on-line site, or on Amazon.

1893 ml canisters for \$25.25 (€21.20).

The company offers 16 puréed fruits. The canister is transported at room temperature and is supposed to be consumable after refrigeration at home.

Sugar added. The purée is used to make juice by adding water, or used in smoothies and other preparations.

Source : [Canoa](#)



Chilled lychee purée

Sold by Funkin, a British company, on their on-line site or on Amazon.

1kg bag for £9.50 (€11.00) in Europe, or 5x1kg for \$70 (€58.20) in the US.

Sugar added. Used for cocktails, bars or pastries and ice cream, for home and professional use.

Source : [Funkin Cocktails](#)



Chilled pineapple purée

Sold by Ravifruit, a French company.

Ready-to-use fruit purée, 1kg Tetra Pak. Aimed at professionals, so little information on prices.

The company also offers frozen purées, as mentioned above, as well as frozen compotes, purée with fruit pieces.

Can be stored for 14 months from the date of manufacture. After opening, can be stored in a cool place for a few days.

Source : [Ravifruit](#)

ASEPTIC FRUIT PURÉES



Aseptic passion fruit purée

Sold by Capfruit, a French company.

1 kg bag. Intended for professional use, therefore little information on prices.

Can be stored for 14 months at max +15°C.

Sugar added.

Source : [Capfruit](#)

c. Specific requirements of the EU market

If (frozen) fruit purées are intended for the production of **fruit juice**, they must comply with the provisions of **Council Directive 2001/112/EC** of 20 December 2001 relating to fruit juices and certain similar products intended for human consumption.

In addition to compliance with the regulations, it may be necessary to obtain certificates, such as the **food safety certificate** (the most common models of which are IFS, FSSC22000 and BRC).

In addition, although it is a **voluntary control system for fruit juices**, more than 80% of fruit juices imported into the EU have the **SGF (Sure Global Fair) certification**. This certification applies in more than 60 countries worldwide and guarantees the authenticity of fruit juices and their compliance with health, food and labelling regulations at all stages of their processing and marketing. Therefore, it is worthwhile, if not essential, for manufacturers who

process fruit into purées to obtain SGF certification if the purée is (potentially) intended for juice production.

Finally, European consumers are increasingly favouring organically produced products. Obtaining **organic certification** will require compliance with the provisions of Regulation (EU) 2018/848, which enters into force on 1 January 2022 and repeals Regulation (EC) 834/2007 on organic production and the labelling of organic products. Imports of organic products from non-EU states must comply with additional requirements, in order to obtain an **e-COI certificate of inspection for electronic organic products**. The import regime for organic products from third countries under Regulation (EC) 834/2007 has, since 2020, been amended by the implementing Regulations (EU) 2020/25 and (EU) 2020/479.



d. Opportunities

i. Reducing fresh fruit waste

The processing of fresh fruit into purée can help to avoid the waste that results from difficulties associated with a lack of infrastructure, particularly storage and transport. These problems particularly affect small-scale producers of fragile fruits, such as lychees and mangoes, which require rapid cold storage: small horticultural farms are often isolated, making their producers dependent on collectors. If collectors are slow to come and collect the produce, it is often spoiled because it is no longer suitable for fresh consumption. For example, Madagascar's lychee production is estimated to be close to 100,000 tonnes (according to the Centre Technique Horticole de Tamatave). However, the demand for fresh lychee in Europe, the main market, is estimated at a maximum of 25,000 tonnes. There is thus an unmarketed production of about 75,000 tonnes in Madagascar, of which 50,000 tonnes are in remote areas and 25,000 tonnes are not used in the Tamatave region.

The collaboration between MPE and the Fohana cooperative is a good example of how these products can be processed locally and marketed in the northern hemisphere. On the one hand, the Fohana cooperative has Fairtrade-certified production and trade relations with Europe. On the other hand, MPE's processing plant allowed a significant change in activity in 2013, with the start of local fruit processing and the export of frozen fruit purées. This, among other factors, has made possible the diversification of the Fohana cooperative from 1 exported product in 2009 (lychee) to 13 different products today, as well as its growth from 150 members in 4 villages to 561 members in 16 villages today.

ii. The potential of European demand for exotic fruit purée

Europe is an important market for **fruit purées** and it is growing. The Netherlands, mainly, and Germany are the main importers. To a lesser extent, the UK, Spain, France and Belgium are also significant markets. In Eastern Europe, there is some growth in Poland, which is another significant market for fruit purées.

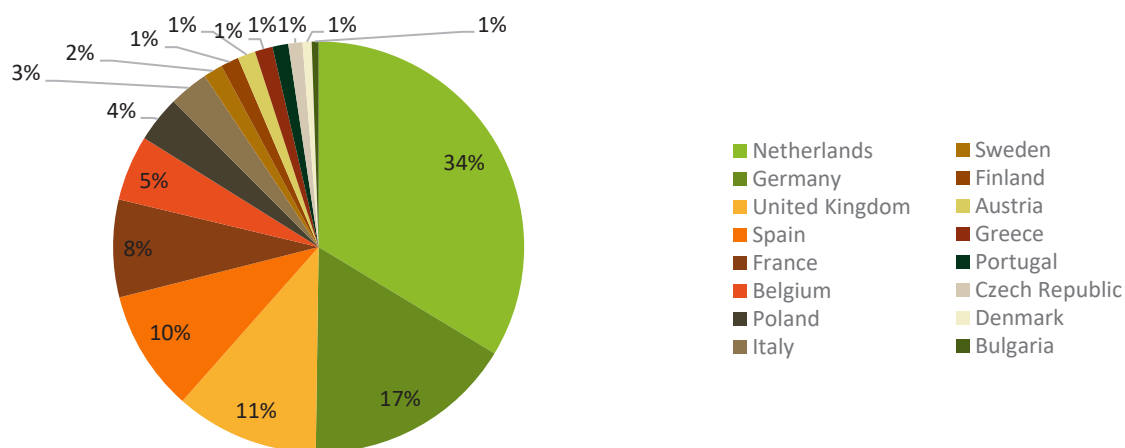


Figure 13: Distribution of EU28 imports of fruit purée from the rest of the world (2019). Source: COLEACP based on Eurostat.

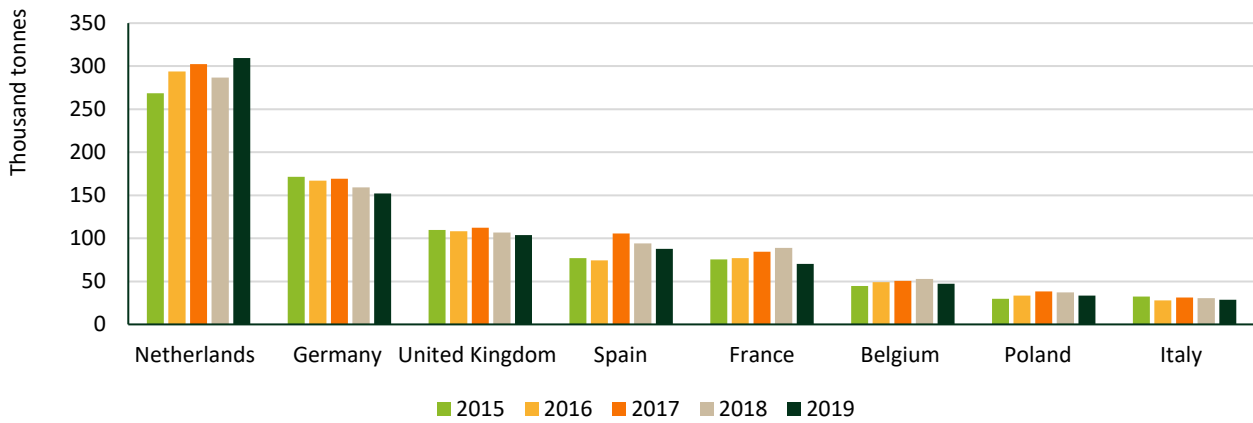


Figure 14 : Changes in European imports of fruit purée in major markets (2015- 2019). Source: COLEACP based on Eurostat.

European imports are mainly banana and mango purée, in concentrated form or with added sugar. The volumes of tropical fruit purée imported by the EU28 have been growing continuously since 2012 (+26,000 tonnes in 7 years). This growth is mainly driven by the Netherlands (+17,500 tonnes in 7 years), the hub for this type of product to the rest of Europe. Indeed, although Germany remains the main European outlet for fruit purées, its imports have been declining over the last decade.

The popularity of smoothies among European consumers, in which mango purée is used extensively due to its taste and texture, as well as the popularity of mango as a flavour in various finished products (juice, yoghurt, baby food, sauce, etc.), are positive trends for the mango purée market in Europe.

Focusing in particular on imports of frozen fruit purée (HS 200799), the opportunities are slightly different, although the main outlets remain the same with the leading

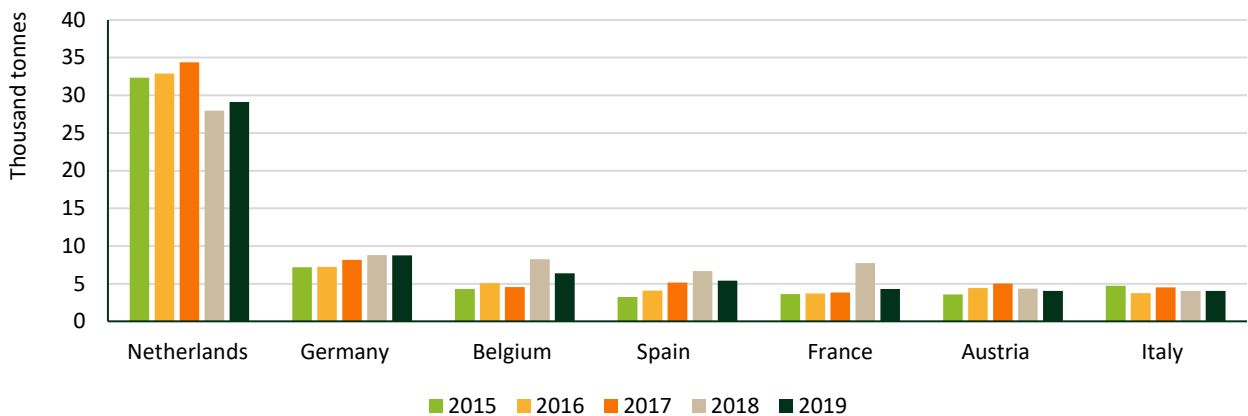


Figure 15 : Detailed trends in imports of frozen fruit purée (HS 200799) in the main European markets (2015-2019). Source: COLEACP based on Eurostat.

pair Netherlands and Germany. It is interesting to note that imports have been increasing overall over the last five years in the main markets. However, there has been a decrease in volumes imported by the Netherlands, the main European outlet.

By concentrating purée production on local exotic fruits, Madagascar's producers could help meet European demand. However,

the EU market imposes many criteria on imports. On the one hand, Europeans are increasingly concerned about the environmental and societal impact of their consumption, favouring organic products in particular. On the other hand, Malagasy producers must comply with the EU regulatory framework, as presented above.

V. CONCLUSION

Today's consumer lifestyle increasingly favours healthy, fast and flexible eating. While the demand for frozen fruit purées is not yet well developed on the part of end consumers, the demand from agribusiness and food industry professionals is growing rapidly.

In order to take advantage of this potential, Malagasy frozen fruit purée producers need to take the following factors into account:

- While the Asian market has the greatest potential for development in the coming years, the demand for Malagasy frozen purée seems limited. The region (especially China) produces most of the fruit it processes into purée itself. The exotic fruits are the same as those produced in Madagascar.
- European demand for exotic fruit purée is increasing and presents interesting export opportunities for Malagasy producers. However, access to the EU market is subject to compliance with various EU regulations.
- The growth of organic fruit purées is one of the main trends in the fruit purée market in the coming years. In order to export organic frozen fruit purées to the EU, Malagasy producers and exporters have to comply with the EU rules specific

to organic food and its exportation.

However, while the processing of fresh fruit into (frozen) purée allows production losses to be limited, it requires a high level of logistics and appropriate infrastructure. These investments are substantial, while the size of the market for frozen fruit purée in Madagascar remains limited.

Although the production of tropical fruit purée meets the growing needs of the international market and consumer tastes, it is clear that Madagascar's purée cannot compete in terms of quantity, logistics and competitiveness with certain large producer countries, such as India. Therefore, in order to differentiate itself on the international market and to gain market share, Malagasy producers must promote the **quality of its production** by increasing its volumes that are **certified as organic** and by promoting a **strong geographical origin** (Terroir, PGI, etc.). The EU market is vast and diversified in terms of potential customers. Hence the importance and the opportunity for the Malagasy on the one hand, to look for potential buyers throughout Europe within the final customers (industries and

not intermediate traders) and on the other hand to highlight their specificities by an adapted marketing policy which could be based on the image and notoriety of the lychee already well known and recognized in Europe.

Other opportunities to be explored: the regional market, due to the logistical advantage; and the Middle East market,

which is growing even though it is highly competitive. In this sense, COLEACP has planned to complete this market profile with a more detailed study of the most promising segments for Madagascar's fruit purees in terms of price and customers. Publication coming soon in 2021.

DATA SOURCES

The data mentioned in this market research report come from the following sources:

- **COLEACP**
 - Own data and data based on UN-Comtrade, IFPRI, Eurostat, FAOSTAT, national statistics, etc.
- **CBI**
 - “Exporting tropical fruit purées to Europe”, 2018
- **Grand View Research**
 - “Fruit Puree Market Size, Share & Trends Analysis Report By Product (Tropical & Exotic, Citrus, Berries), By Application (Beverages, Bakery & Snacks, Baby Food), By Region, And Segment Forecasts, 2020 - 2027”, 2020

FROZEN FRUIT PURÉE (LYCHEE, PINEAPPLE,
PASSION FRUIT, SOURSOP, GUAVA, ETC.) FOR THE
EUROPEAN AND INTERNATIONAL MARKET



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