



MARKET STUDY ON THE ORGANIC FRUIT AND VEGETABLES TRADE

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ACRONYMS AND ABBREVIATIONS

ACP	African, Caribbean and Pacific	ICS	Internal Control Systems for group certification
AfrONet	African Organic Network	IFOAM	International Federation of Organic Agriculture Movements (IFOAM – Organics International)
AMAPs	Associations pour le Maintien d'une Agriculture Paysanne	IPD	Import Promotion Desk
AROS	Asia Regional Organic Standard	ITC	International Trade Centre
AU	African Union	MSC	Marine Stewardship Council
CAADP	Comprehensive Africa Agriculture Development Programme	MSMEs	micro, small and medium sized enterprises
CAGR	compound annual growth rate	NGO	non-governmental organisation
CBI	Centre for the Promotion of Imports from developing countries	OACPS	Organisation of African, Caribbean and Pacific States
COLEACP	Liaison Committee Europe-Africa-Caribbean-Pacific	OECD	Organisation for Economic Co-operation and Development
COLEAD	Committee Linking Entrepreneurship, Agriculture and Development	OTA	Organic Trade Association
EAOPS	East African Organic Product Standards	PGS	Participatory Guarantee System
EOA	Ecological Organic Agriculture	POS	Pacific Organic Standard
EU	European Union	ROC	Regenerative Organic Certification
F2F	Farm to Fork Strategy (of the European Commission)	SDGs	Sustainable Development Goals
FAO	Food and Agriculture Organization of the United Nations	SPS	sanitary and phytosanitary
FFM+	Fit For Market + programme	SWOT	strengths, weaknesses, opportunities and threats
FiBL	Research Institute of Organic Agriculture	UK	United Kingdom of Great Britain and Northern Ireland
FSC	Forest Stewardship Council	UN	United Nations
GAP	good agricultural practices	USA	United States of America
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit	USAID	United States Agency for International Development
GORP	Good Organic Retail Practices guide		



EXECUTIVE SUMMARY

Agriculture is still the main income source for millions of small farmers around the world. But markets continue to be fragile. This study aims to provide information to farmers and exporters about global markets for organic fruit and vegetables, especially for the markets in the EU27 (+UK where data are available) and the USA, allowing them to make more informed decisions. It covers a wide range of topics, including pricing, certification, consumption trends and other influencing factors, global trade, and production data and trends. It identifies opportunities and threats, and offers links to further information, tips for exporters, and detailed recommendations.

The report also provides an introduction to organic agriculture and the different certification standards used in key markets, as well as other non-organic sustainability standards and labels.

A global overview of organic production focuses on the African-Caribbean-Pacific (ACP) regions. In 2020, 74.9 million ha were certified organic or in conversion, representing 1.6% of global agricultural land. The African continent has the second highest number of organic producers worldwide, after Asia, due to the high number of MSMEs and SMEs. Ethiopia, Sierra Leone and Tanzania had the highest proportion of organic agricultural land in Africa in 2020, while the Dominican Republic dominates the ACP-Caribbean region in terms of organic area. In the ACP-Pacific, Papua New Guinea, Samoa and Fiji have the largest organic area, with a high percentage of organic farmland.

The EU and USA organic fruit and vegetable markets are very dynamic and also very competitive. This study gives a global overview of the trade in organic fruit and vegetables, and a deeper look into the main markets. Worldwide organic retail sales

grew consistently at 10.4% per year between 2000 and 2020, although during 2022 (a year not included in the scope of this research) the growth of EU organic sales slowed, leading to a market correction after strong growth in 2020 and 2021 at the height of the COVID-19 crisis. The main markets are the USA and the EU27+UK, accounting for 81% of worldwide organic retail sales in 2020. The emerging organic Asian markets, mainly China, have been growing in recent years. The main national markets in EU27+UK are Germany and France. In the organic fruit and vegetables sector, bananas are the leading imported organic fruit.

The report analyses global factors influencing organic markets, including:

- ← Competition on global markets, which requires ACP exporters to define clear advantages over other exporting countries, and to know their production and export capacities.
- ← Impact of global factors: the Covid-19 pandemic; Brexit; politicisation of organic agriculture; global policies such as the UN Sustainable Development Goals, the European Green Deal and the Farm-to-Fork Strategy; and political changes in the USA towards organic products.
- ← Food consumption trends: increased interest in farmers' social conditions; impacts on climate; sustainable use of resources; impact of food on health; growth of specialised diets; changes in distribution channels; curiosity about exotic flavours.

Details are provided on the main exporting and importing countries, market shares and trends over recent years for 11 selected key crops. These are divided into fruit and nuts – avocados, bananas, cashew nuts, coconuts, mangoes and pineapples;

and vegetables and spices – ginger, onions, pulses, tomatoes and sweet potatoes. Possibilities for ACP producers and exporters regarding these crops are highlighted, and the potential of these products for the EU27 and US markets is summarised. For example, organic ginger showed promising growth in the EU27 market between 2018 and 2021: large quantities are imported, and organic ginger represents a high share of total ginger imports. Organic avocado from ACP suppliers also presents a growing opportunity for both EU27 and US markets. More examples can be found in the relevant sections.

Detailed analyses of these products are followed by a SWOT analysis that assesses the strengths and weaknesses of the sector, and the opportunities and threats. Opportunities for ACP suppliers to export organic fruit and vegetables include:

- ← Growing global demand for organic food during the period studied, with strong growth in the USA and EU, as well as in the emerging Chinese market.
- ← Food consumption trends driving increased demand for organic food in general, and particularly fruit and vegetables, boosted by the Covid-19 pandemic and the EU Green Deal.
- ← Increasing supply of organic products in ACP countries, and an incentive to convert to organic farming due to the already low use of agrochemicals in some of these countries.
- ← Limited or no production in European countries or the USA for a number of products covered by this study.

However, there is strong competition from non-ACP suppliers, so exporters in ACP countries need to

define their competitive advantages and unique selling proposition. There are some indications of slower growth in organic consumption in the EU market in 2022 compared to 2021, as a consequence of global crises and reduced purchasing power in 2022, but the growth appears to be continuous compared to 2019.

The report invites producers and exporters in ACP countries to ask themselves: “Where and how can I find markets for my organic fruit and vegetables? Am I ‘fit for market’, and if not, what can I do to achieve that?” The final section offers recommendations grouped into three key areas for attention.

1. Identify markets and marketing approaches. This requires producers and exporters to: (i) match products to the most appropriate market, (ii) determine whether organic certification is needed and feasible, (iii) build a unique selling proposition, and (iv) develop a sales and marketing strategy.
2. Develop and maintain successful trade relationships. The key requirements for producers and exporters are to: (i) ensure a high and consistent level of product quality, (ii) be proactive, honest and clear with potential buyers, and (iii) build trusting business relationships with existing buyers.
3. Look for local and international cooperation. Building and expanding markets needs improved linkages, and producers and exporters must: (i) engage with local stakeholders, (ii) collaborate with international organisations to facilitate market access, (iii) cooperate with other exporters to reach scale, and (iv) find a lasting logistics partner.

This report is an output from the Fit For Market Plus (FFM+) programme, implemented by COLEAD and financed by the European Commission and the Organisation of African, Caribbean and Pacific States (OACPS). This forms part of European support for policies and actions that strengthen productive capacities, stimulate innovation, and improve the sustainability and competitiveness of the private sector in ACP countries. The goal is to contribute to poverty reduction and improved food security and nutrition, by supporting the building of a fairer, safer and sustainable agri-food sector in member countries of the OACPS. Fit For Market Plus aims to support smallholders, farmer groups and MSMEs to maintain and improve access to national, regional and international horticultural markets while adapting to changes in the operating environment due to the Covid-19 pandemic; and to enable them to seize new market opportunities through the development and adoption of safe and sustainable practices, skills and technologies. There is an emphasis on the opportunities brought by the digital transition, and on the inclusion of youth and women.





1

INTRODUCTION

1.1. About COLEAD

The Liaison Committee Entrepreneurship, Agriculture and Development (COLEAD), formerly the Europe-Africa-Caribbean-Pacific Liaison Committee (COLEACP) is a private sector association of companies, associations and experts from African, Caribbean and Pacific (ACP) and European Union (EU) countries, committed to sustainable agriculture. COLEAD's mission is to develop inclusive and sustainable trade in agricultural and food products (particularly fruit and vegetables), primarily within ACP states and between these countries and the EU. Since its establishment in 1973, COLEAD has been pioneering a new model of collective social responsibility, combining global reflection and local action for the benefit of the ACP-EU fruit and vegetable sector by focusing on the development of human capital. COLEAD is committed to combining economic, social and environmental transition and laying the foundations for new partnerships within agri-food value chains.

Since its creation, COLEAD has managed development projects in the agricultural and food sector in ACP countries, financed by the EU and other international donors. The overall objective of current EU-ACP programmes (Fit For Market SPS, FFM+, Agrinfo, and NExT Kenya) is to reduce poverty, improve food security and food safety, and ensure sustainable and inclusive growth by strengthening the ACP agri-food sector. The specific objective is to enable smallholders, farmer groups and organisations, and micro, small and medium sized enterprises (MSMEs, to access domestic, regional and international markets by complying

with sanitary and phytosanitary (SPS) and market requirements, within a sustainable framework.

Since the onset of the COVID-19 pandemic, COLEAD has complemented and reinforced its activities through national programmes that enables it to respond to requests from the private and public sector, and from civil society.

COLEAD individually or collectively supports partners and beneficiaries in improving their managerial, technical and educational skills with the objective of enhancing their competitiveness through the adoption of sustainable practices. COLEAD also implements other programs/projects funded by multiple donors ([website](#)). The volume and frequency of requests for support demonstrate not only the growing needs, but also the dynamism of the agri-food sector in ACP countries in domestic, regional and international markets.

The COLEAD Market Insights department undertakes market studies, to translate qualitative and quantitative data into an improved understanding of markets, and concrete initiatives for partner beneficiaries that facilitate decision-making processes that drive sustainable development. COLEAD expertise comprises of a team of dedicated professionals and external experts in the international agri-food sector, and in particular in the horticultural industry in African, Caribbean and Pacific countries.

Market studies on the fruit and vegetable trade have been published on each region, alongside opportunities in the European Union. Other publications from the Market Insights department can be found in the COLEAD [e-library](#).



1.2. Context

The growth of organic farming has accelerated in recent years as a production and consumption alternative to conventional agriculture. This transformation is reflected in a global increase in the number of organic farms, and the total area under organic cultivation (certified and in-conversion) more than doubled between 2007 and 2020, to 74.9 million hectares (Willer et al., 2022).

The concept of organic agriculture arose through the work of Albert Howard amongst many others in the early 1900s, initially in Austria, Germany, Switzerland, the UK and USA, and the middle of the century had spread, making its first appearance in France in 1950s (www.inao.gouv.fr/eng/Official-signs-identifying-quality-and-origin/Agriculture-Biologique).

In the mid-1900s, the use of pesticides and chemical fertilizers made it possible to increase production and ensured food security for the rapidly increasing global population. The intensification of agriculture put an end to food rationing in Europe in 1953 and was, from 1962, supported by the European Economic Community's agricultural policy in order to achieve European self-sufficiency.

The organic agriculture movement developed in parallel but that refused to accept agricultural intensification. Two approaches to organic agriculture coexist: one that is limited to the creation of a new economic model, and the other that aspires to the emergence of a new societal project. However, both recognize the link between agriculture, food, and environmental and human health and well-being, while denouncing the

dependency of producers on the agro-industrial model that underlies intensive agriculture.

The development of organic farming in Europe relies on both producers and consumers, alongside as some limited government support. These actors have driven the creation of an organic market, but this development is specific to the European continent and differs from that seen in ACP countries.

The development of the organic market in ACP countries is more recent. Early initiatives were launched in the 1980s, and it is only from the 2000s that organic agriculture really started to develop in ACP countries. The area under organic agriculture in Africa, for example, reached 2.1 million ha in 2020, as opposed to 0.05 million ha in 2000. In addition, this development is not the direct result of a challenge to intensive agriculture, but seeks to meet the demand for (tropical) organic products in Western countries. By developing export markets, ACP countries have thus focused on the organic standards and specifications of export destinations such as the EU, the USA and Japan.

In ACP countries, studies report that conversion to organic agriculture would increase profits for producers, productivity, and producers' quality of life (FAO, 2013; Arah, 2015). Organic inputs tend to be cheaper than chemical inputs, and organic fertilizers have been shown to improve soil quality in the long term. Many producers in ACP countries also have small farms and farming methods that are already much more compatible with organic agriculture.

1.3. Objectives, scope and methodology

Objectives

The purpose of this study was fivefold.

- ← Provide a definition of organic and sustainable farming, how organic agriculture is regulated by standards and labels, and how exporters can become certified (Section 2).
- ← Assess the level of organic farming in ACP countries and how this has developed over time (Section 3).
- ← Determine the opportunities presented by different geographical markets for organic produce and what factors influence this demand (Section 4).
- ← Evaluate the potential for ACP exporters of organic fruit, vegetables, nuts and spices (Section 5).
- ← Present the potential for ACP fruit and vegetable producers to enter the organic market based on an analysis of their strengths, weaknesses, opportunities and threats, leading to recommendations to overcome challenges (Section 6).

This approach aims to identify niche markets for market entry by focusing on small volumes of high value-added organic fruit and vegetables. This allows small producers in ACP countries to avoid the domination of large horticultural players in conventional trade who produce large volumes at low value.

Target audience

The main target audience of this report are exporters of organic and conventional fresh fruit and vegetables in ACP countries as partner beneficiaries of the 16 programmes managed by COLEAD. Where relevant, this report also includes specific recommendations for exporters, included in separate text boxes.

In addition, as the report covers developments in international markets, it is also relevant for other stakeholders in the organic fruit and vegetable sector, such as importers, NGOs, policy makers and government institutions.

Geographical scope

In terms of production, the report focuses on supply of ACP countries. Section 3 (Status of organic production) describes organic farming globally, with a focus on organic production in Africa, Caribbean and Pacific.

Regarding global markets and trade, this market research focuses on European and North American organic markets, as these are the largest markets for organic food. Section 4 (Demand for organic fruit and vegetables) provides an overview of global markets for organic agri-food products, including Asia, Pacific, Latin America, the Middle East and Africa, but with more details on the European and North America markets. This section also describes the main factors influencing global organic food markets.

When considering Europe, this refers to countries from the EU and outside. When considering only the European Union, this is clearly stated, as 'EU' or 'EU27'. The UK is no longer a member of the EU.

When considering ACP countries, this includes all countries grouped in the Organization of African, Caribbean and Pacific States (OACPS), but excludes South Africa. South Africa is not included when mentioning 'ACP countries' in this report, unless specifically indicated.

Selected products

This market research covers organic fruit and vegetables, or all organic food in general where specified. The 'fruit and vegetable' category also include nuts and spices when indicated. In Section 5 (Key exported products), 11 products were selected for analysis in more detail regarding their export to main markets, and the main suppliers. This presents opportunities and developments for the following products.

- ← Organic fruit and nuts – avocados, bananas, cashew nuts, coconuts, mangoes, and pineapples.
- ← Organic vegetables and spices – ginger, onions, pulses, tomatoes, and sweet potatoes.

Methodology

For organic agriculture production, the most complete data comes from FiBL and IFOAM Organics International through their reports and databases, as certification bodies report to these organizations. However, this does not represent the full reality of production, as some is not recorded or not updated every year. However, this is the most accurate available data even if not always complete. These organizations also gather and make available retail sales data for many countries and regions. This allows the observations of trends over 20 years of organic retail sales for different regions.

Regarding trade data for organic products, they are limited to the EU27 and USA markets. Regarding EU27 organic trade, available data from the European Commission covers organic imports from 2018 to 2021, excluding UK imports of organic products for which data is not available. Concerning the USA market, some data on organic food imports and exports are available, but not for all products covered in this report. Data for 2021 is not included, as it is not sufficiently complete. Trade data used is from ITC Trademap, gathered by the International Trade Centre from trusted sources such as UN-Comtrade or the US Census Bureau, that covers total global trade for conventional products, and some organic food products. In Section 5 (Key exported products), data covers organic imports from 2016 to 2020 for some of the products.

Data stops is available only up to 2020 for all the analyses, except for organic imports into the EU27 that goes up to 2021.

Information comes from literature, studies, and research, as well as interviews conducted by COLEAD with European importers, as well as actors in the African, Caribbean and Pacific regions. For some specific commodities, trade data are supplemented by available market reports and news articles. The appendixes provide the sources used in this report.



2

OVERVIEW OF ORGANIC AGRICULTURE

2.1. What is organic farming?

IFOAM – Organics International (formerly known as the International Federation of Organic Agriculture Movements) ensures the coherence of the various organic agriculture systems and standards around the world. It defines organic agriculture as “a production system that sustains the health of soils, ecosystems and people.”

Organic agriculture relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs with potentially adverse effects. It can be considered as a mean of sustainable farming that aims to meet the needs of existing and future generations, while ensuring profitability, environmental health, and social and economic equity (UNEP, 2021). Organic agriculture combines tradition, innovation and science to benefit the shared environment and promote fair relationships and a good quality of life for all involved.

Organic agriculture is based on management practices that limit the use of unnatural production factors, such as synthetic fertilizers or pesticides. These products are replaced using cultivation and cultural, biological and mechanical methods such

as manure, ladybirds or pheromone traps. Organic agriculture also favours seed varieties adapted to the natural environment rather than hybrid varieties or genetically modified organisms.

In practice this means...

- ← Feeding the soil with organic matter (compost, manure, mulch, green manure, etc.).
- ← Using nature and biodiversity for promoting beneficial insects and combating pests.
- ← Spraying extracts of plants and other natural compounds against pests and diseases.
- ← Using robust crop varieties.

2.2. Standards and certification

This provides an overview of standards and certification schemes for sustainable farming practices with a focus on organic agriculture, including regulations and labels, and links to further information. It is necessary to understand and follow all standards for organic products on top of general trade regulations, depending on the export country, the target market and the export product.

Organic standards can be defined by governments, or by national or global organisations like IFOAM – Organics International, or by private companies – the certifying organisations. Organic standards include regulations for production, processing, and trade. Some also include aspects of sustainability or fair trade.

Organic certification enables a company’s organic products to be commercialised into a defined market and for defined products.

Organic labels identify products as being organic for buyers and consumers. They can only be used for products which are compliant with organic standards and have been acknowledged by an independent certification body as organic.

Organic production is strictly regulated as part of a label on food products, and can only be used when farmers and processors are compliant with the organic standards defined for the respective label. To be called organic and to be labelled organic in the EU, a food must contain at least 95% organic ingredients. The organic regulations in the USA provide different organic categories depending on the composition, i.e. ‘100% organic’, ‘organic’ (with >95% organic ingredients), ‘made with organic’ (with >70% organic ingredients), etc. (www.ams.usda.gov/grades-standards/organic-standards).

‘Natural’ or ‘Bio’ are often used by farmers and exporters in ACP countries to label products that are produced without using pesticides or chemical fertilizers. In most countries outside of Europe the use of those terms is not regulated. Such products can only be accepted for regional sales, if buyers and consumers trust that the producers follow undefined ‘natural’ or ‘bio’ regulations, but they cannot be sold as ‘organic’ if they are not compliant with organic regulations. Within Europe

Figure 1: Principles of organic farming. Source: IFOAM – Organics International



the use of the terms 'biologisch', 'biologique' and 'eco' is defined for all European languages within EU Regulation 2018/848 on organic production and labelling to avoid misleading European consumers.

Organic by default is a term that does not describe organic food. Farmers often use this if there is no pesticide application in the field for different reasons.

There are many organic farming regulations, standards and labels around the world. They can be governmental, non-governmental, or private, and can apply at international, regional, national, or local level. This means that depending on the country in which products are sold, standards and requirements may differ, making it difficult to identify and understand the regulations, and to trade where standards are not mutually recognised.

All standards are based on the same fundamental principles of organic agriculture as described above. However, the production and labelling procedures vary, such as the duration of conversion, or the composition of products recognised as organic.

2.2.1. Global, regional and national standards and labels

IFOAM Standard



Codex Alimentarius



Those global standards serve as models for national or regional standards and regulations but are not legally binding. IFOAM –Organics International sets the global framework for organic standards and maintains a global non-profit independent evaluation programme that explains which

organic labels are reliable. Organic standards that comply with the IFOAM requirements are part of the IFOAM Family of Standards: <https://www.ifoam.bio/our-work/how/standards-certification/organic-guarantee-system/ifoam-family-standards>.

Most national standards (see logos below) are part of the IFOAM Family of Standards. When exporting to one of the following markets, these standards need to be fulfilled.

Further regional organic standards are the East African Organic Product Standards (EAOPS), the Pacific Organic Standard (POS) and the Asia Regional Organic Standard (AROS) (Lim Tung, 2008).

Thailand



India



Germany



France



Tanzania, Kenya



USA

USDA organic regulations



EU

EU organic standard (EU) 2018/848



Japan

Japanese Agricultural Standards



2.2.2. Private standards and labels

There are numerous standards developed by private associations, in addition to national or regional labels. These must comply with the legal regulations in the region or the country. Most trading partners in Europe are looking for stricter organic or sustainable standards for their products and follow individual private organic labels. This is often a way to position themselves within the market, and some private labels are required by trade partners in many European countries, such as in France, Germany or in the UK (see labels below).

The next level of organic certification is the Regenerative Organic Certification (ROC) which requires higher compliance criteria for soil health, animal welfare, and farmworker fairness than current private organic standards. The ROC standard is used for food, textiles, and the

personal care ingredients industry, and is well known already within the USA market but less so in Europe, although aspects of ROC are important for European supply chains and are demanded by buyers and consumers (see <https://regenorganic.org/resources/>),

Within markets, organic products allow a better segmentation of the offer, especially for products with large markets. For example, instead of having only a conventional pineapple market, there are now conventional and organic pineapple markets. Both products have different distribution channels, different price segmentation, and the organic product often allows the producer to highlight individual values and missions, which are recognised by buyers and consumers.

2.2.3 Sustainable agriculture standards and labels

The fundamental elements of organic agriculture, in particular the protection of the environment and biodiversity, are also part of sustainable agriculture schemes. The objective of sustainable agriculture is to preserve natural resources and the soil in order to guarantee future agricultural production. According to the [USDA legal definition](#), sustainable agriculture means “an integrated system of plant and animal production practices having a site-specific application that will over the long-term: satisfy human food and fiber needs ; enhance environmental quality and the natural resource base upon which the agriculture economy depends; make the most efficient use of nonrenewable resources and on-farm resources and integrate, where appropriate, natural biological cycles and controls ; sustain the economic viability of farm operations ; and enhance the quality of life for farmers and society as a whole”.

There are many standards and labels focusing on different aspects of sustainability. They may be included with organic certification, but consumers often confuse different available standards and labels for healthy and sustainable products. The following are some of the main labels that incorporate different aspects of sustainable production.

Nature & Progrès

(France)



Demeter / Naturland

(Germany)



Soil Association

(UK)





Fairtrade International

Focuses on aspects of trade such fair prices for, and empowerment of producers, etc.



Rainforest Alliance

Focuses on sustainable agricultural production and supply chains.



UTZ kapeh
(now part of Rainforest Alliance)

Focuses on sustainable farming mainly for coffee and cocoa production; UTZ kapeh means “good coffee”. With the launch of the 2020 Rainforest Alliance Certification Program in July 2020, UTZ and its corresponding label are gradually being phased out.



Forest Stewardship Council (FSC)

Focusing on sustainable forest management and traceability in supply chains.



Marine Stewardship Council (MSC)

Focuses on sustainable fisheries and traceability in supply chains.

TIPS FOR EXPORTERS

Use the following links to find organic regulations which are relevant for the EU organic market - [organicseurope..organic-regulation](https://www.organicseurope.eu/organic-regulation) or for the USA market - <https://www.ams.usda.gov/about-ams/programs-offices/national-organic-program>

Information about legal requirements and certification schemes per country: <https://www.organicexport.info/about.html>



Photo by Colby Ray on Unsplash

TIPS FOR EXPORTERS

Before being certified, a product is 'conventional' and cannot be sold as organic. Before starting the certification process, production and processing should be already adapted to the standards of the requested certification body. This decreases costs and time required for completing the process. In many cases, local non-profit organisations can assist, even a potential buyer can support with advise and investment.

When exporting to the EU or USA, please be aware that you have to comply with further requirements for food safety and product quality.

To export into the EU for conventional, the Access2Market tool is available for more information from the European Commission. In the following link, you can select the country of export and import, and the product for trade, to find more information - europa.eu/access-to-markets/en.

To export organic products into the EU, all relevant information is available from https://agriculture.ec.europa.eu/farming/organic-farming/trade_en, and up to date information about EU organic regulations at https://agriculture.ec.europa.eu/farming/organic-farming/legislation_en

To export organic products into the USA, information is available from [USDA Organic Regulations](#). You will find details about regulations, the national list of allowed and prohibited substances in organic crops and livestock products, and a Program Handbook for your guidance.

2.2.4. Becoming certified

Certification is the process by which a product and its entire production system are recognised as conforming to the standards of the relevant certification scheme. If the standards are fulfilled, as verified an accredited certifying body, the product can be marketed using the respective label.

There are three different ways to become certified.

- ← Third party certification of one or several products.
- ← Group certification.
- ← The Participatory Guarantee System (not for exports).

Third party certification is certification by an independent certifying organisation or certifying body. The exact steps can differ depending on the certifying body, but the main steps are shown below (Figure 2).

The costs of certification are dependent on the following five factors: the products, size of company, target market, the country, and the certifying organisation.

TIPS FOR EXPORTERS

Before you decide which organic certification to work towards, If you aim to sell in your country, in the region or for export, it is recommended to follow the steps below.

1. Decide on the target market for your defined product.
2. Decide on the distribution channel in your target market.
3. Decide if you require certification, or not.
4. Conduct market research and contact of some potential buyers, to define which certification is best suited to your needs.
5. Select a certification body accredited in your country.
6. Contact the potential certification body for more details.

Figure 2: The organic certification process. Source: India Organic Certification (2015)

The organic certification process



Group certification is a third party certification system for small producers. This is particularly common in countries of the South. This offers farmers a possibility to share costs, experiences and knowledge. This kind of certification is managed by a system of internal controls (ICS). More details are available at <https://www.ifoam.bio/.../ICS>

Participatory Guarantee System (PGS) is a certification system for selling on local markets. This uses alternative certification methods that certify on the basis of the active participation of the stakeholders concerned, and are built on a foundation of trust, networks and knowledge exchange. Certification is thus carried out by third parties, such as farmers, consumer groups, NGOs or environmental agencies, etc. Participatory guarantee systems are particularly well developed in Latin America and Africa and have proved to be very successful. Further details can be found at <https://www.ifoam.bio/.../PGS>

2.2.5. Evolution of the EU organic regulation

The overhaul of the EU organic regulation accompanies major new policy initiatives under the European Green Deal, the Farm to Fork Strategy, and EU Action Plan For The Development of Organic Production, with the ambition to reach a target of at least 25% of the EU's agricultural land being under organic farming by 2030. An organic action plan for Europe is being established, operating around three main areas.

- ← Axis 1: Stimulating demand and ensuring consumer trust.
- ← Axis 2: Stimulating conversion and strengthening the value chain.

- ← Axis 3: Improving the wider contribution of organic farming to sustainability.

The first draft of the new regulation was introduced in 2014. It was finally published in the Official Journal in 2018, and applied in January 2022. This long process reflects the often contentious negotiations and the wide range of opinions and positions within European institutions, Member States, and the organic sector.

The new regulation also has significant implications for the organic sector in other countries. Many rules have been clarified and adjusted to align third countries with EU organic practices. The regulatory approach has also changed fundamentally, moving from a framework based on the principle of equivalence, to one that is based on conformity. Previously, organic goods could be produced in ways that were different, but accepted to be equivalent in terms of their outcome and alignment with organic principles. Under the new regulation, producers in third countries will have to conform with exactly the same set of rules as those in the EU.

Since the publication, 26 items of secondary legislation have been introduced covering trade rules, official controls, organic controls, production rules, and labelling. The European Commission recognises that there may be challenges for operators as they adapt, but aims to achieve a balance between meeting the fundamental principles of organic production, and the need to maintain flexibility for all operators.

In terms of trade rules, there will still be two systems for importing organic products from outside the EU. The first are trade agreements, whereby all third countries currently recognised as equivalent will have to renegotiate the terms as

bilateral trade agreements. The second are control bodies, whereby the European Commission has a list of recognised control bodies or authorities that are authorised to carry out inspections and certification in third countries. Secondary legislation specifies how the trade rules will operate, the procedures by which trade agreements are negotiated, and how control bodies are authorised.

In terms of organic controls, of most concern are the new rules on farmer groups and sampling procedures. The changes to group structure and functioning will affect many operators in third countries, creating additional technical, administrative, and cost burdens that are particularly challenging for small-scale growers.

New production rules cover organic conversion, plant production, plant reproductive material, collection, packaging, transport and storage, and authorisation of products and substances. Of particular importance is secondary legislation for the authorisation of products and substances for use in organic systems. The changes provide less flexibility than under the equivalence arrangements and are particularly likely to affect producers in tropical and sub-tropical countries where the pests, pest pressure, socio-economic and agroecological conditions are very different to those in Europe.





3

STATUS OF ORGANIC PRODUCTION

3.1. Organic farming areas in the world

According to FiBL and IFOAM data, there were 15 million ha of organic farmland in 2000, which had increased to 74.9 million ha in 2020 (certified and in conversion) (Figure 3), representing 1.6% of global agricultural land, in countries covered by the data.

Almost half of global organically certified land is in Oceania, mainly in the form of permanent grassland in Australia (Figure 4).

The number of organic producers reached 3.4 million in 2020. Asia has the largest number of organic producers (53.7%), particularly India, followed by Africa (24.7%).

Figure 5 shows the top 10 countries globally with the highest share of organically certified land as a percentage of national agricultural area.

Figure 4: Distribution of organic area between continents in 2020. Source: FiBL and IFOAM (2022)

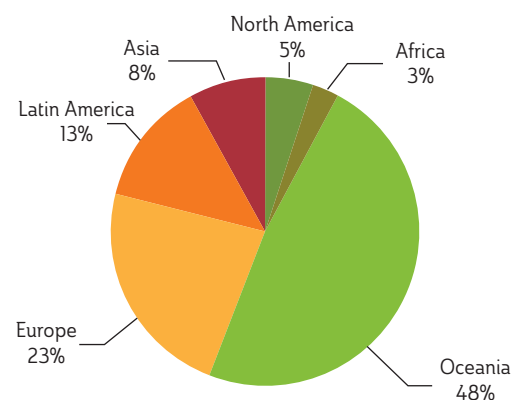
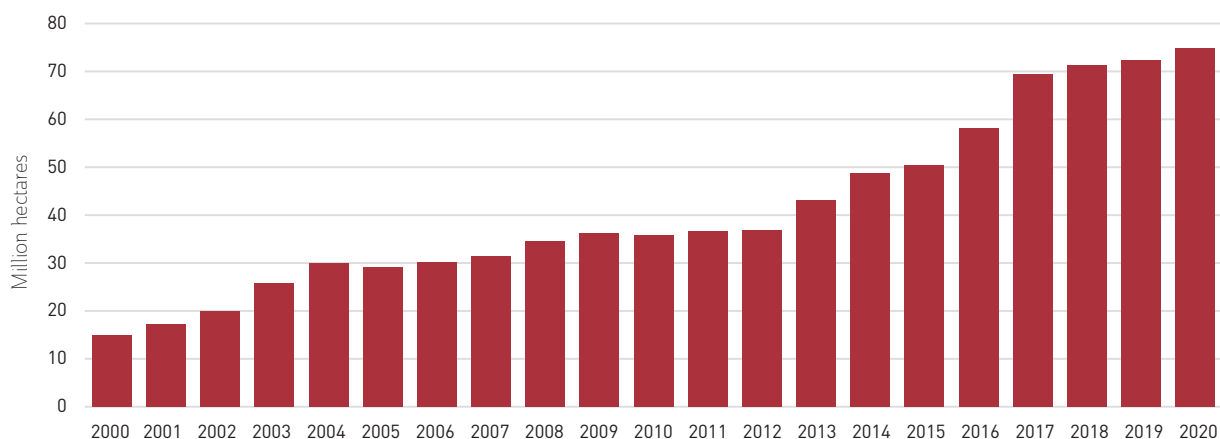


Figure 3: Evolution of total global organic agricultural land area. Source: FiBL and IFOAM (2022)



The distribution of area by crop depends on the region (Figure 6). The largest arable crop areas, including vegetables and some spices, are located in Europe (61%) followed by Asia (21%) and North America (9%). Permanent grasslands dominate in Oceania (68%), followed by Latin America (15%) and Europe (13%). The largest areas of organically certified permanent crops, which include fruit and nuts, are in Europe (36%) and Africa (26%).

Globally, organic arable cropland is mostly used for cereals (5 million ha), green fodder (3.2 million ha), oilseeds (1.8 million ha) and pulses (748,000 ha). Vegetables occupy more than 421,000 ha, or 3% of arable cropland. The most common permanent crops include olives (895,000 ha), nut crops (749,000 ha) and coffee (754,000 ha), as well as fruits including grapes (498,000 ha), coconuts (294,000 ha), tropical and subtropical fruits (293,000 ha), temperate fruits (256,000 ha), citrus fruits (141,000 ha), and berries (66,000 ha).

Figure 5: Top 10 countries with the highest share of organic farmland in 2020. Source: FiBL and IFOAM (2022)

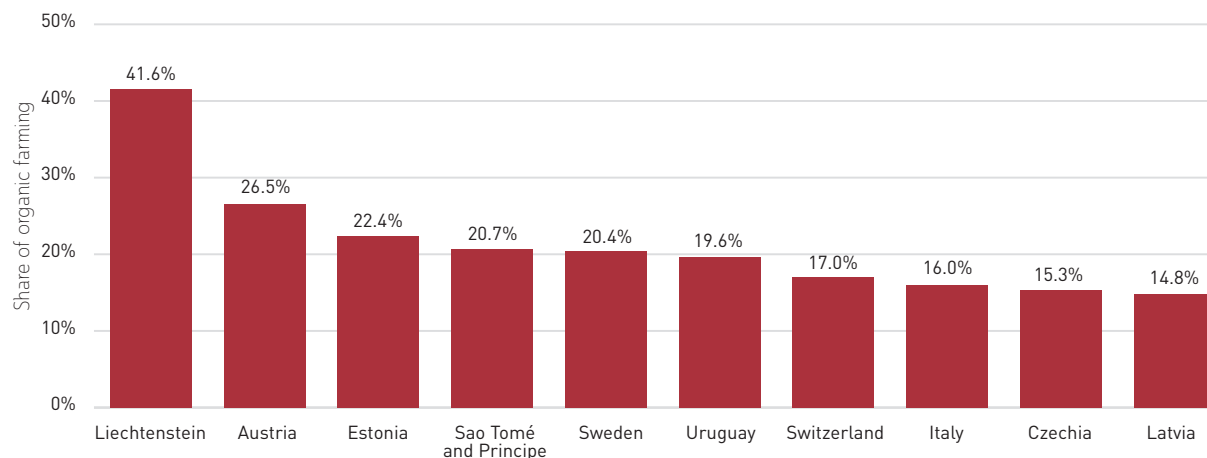
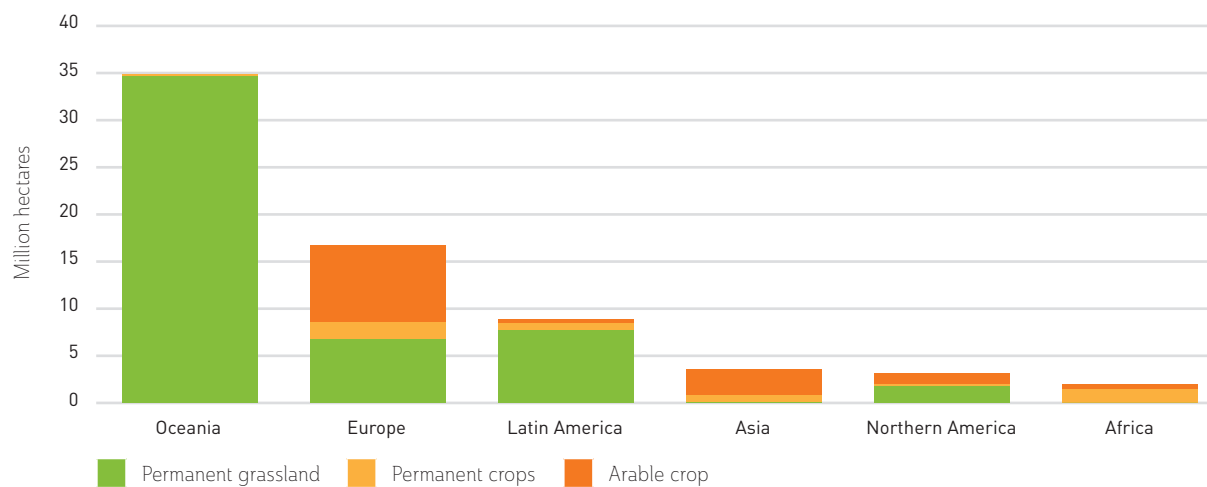


Figure 6: Distribution of agricultural land by continent and crop type. Source: FiBL and IFOAM (2022)



3.2. Africa

In Africa, much of the rural population is engaged in agriculture. The agricultural sector is thus hugely important, to smallholder livelihoods, agri-food SMSEs, and to local and national economics through income from exports. Organic farming is also increasingly supported by African governments. Supporting this development, a series of African Organic Agriculture Conferences was initiated in 2009 by the African Organic Network (AfrONet). Held every three years, African organic stakeholders and governments gather to discuss a specific topic, with a number of important agreements made during previous conferences, including the following.

- ← **Lusaka Declaration 2012.** At the second African Conference on Organic Agriculture in 2012, more than 35 states signed the Lusaka Declaration on integrating organic agriculture into the African development agenda. This defined the six pillars of the African Action Plan for Organic Agriculture: research, training and extension; information and communication; value chain and market development; networking and partnership; supportive policies and programmes; and institutional capacity development.
- ← **Malabo Declaration 2014.** Heads of States and Governments of the African Union signed the Malabo Declaration committing to fight hunger, develop African trade and ensure that agriculture contributes effectively to poverty reduction. Although organic agriculture is not the main focus of this commitment, it contributes greatly to the achievement of its goals.

← **CAADP 2018.** African Union members agreed on the third Comprehensive Africa Agriculture Development Programme (CAADP) to 2025. This takes up the objectives of the Malabo Declaration to be pursued by more governments, after only 20 and the 47 AU member states having implemented it by 2018.

In addition to their joint commitment through the African Union, some countries are unilaterally promoting the development of organic agriculture. The Ministry of Agro-Industry and Food Security in Mauritius, for example, has signed a cooperation project with FAO to develop organic agriculture. Producers in other African countries using organic farming methods are increasingly setting up participatory guarantee systems (PGS), notably in Burkina Faso, Kenya, Tanzania and Uganda.

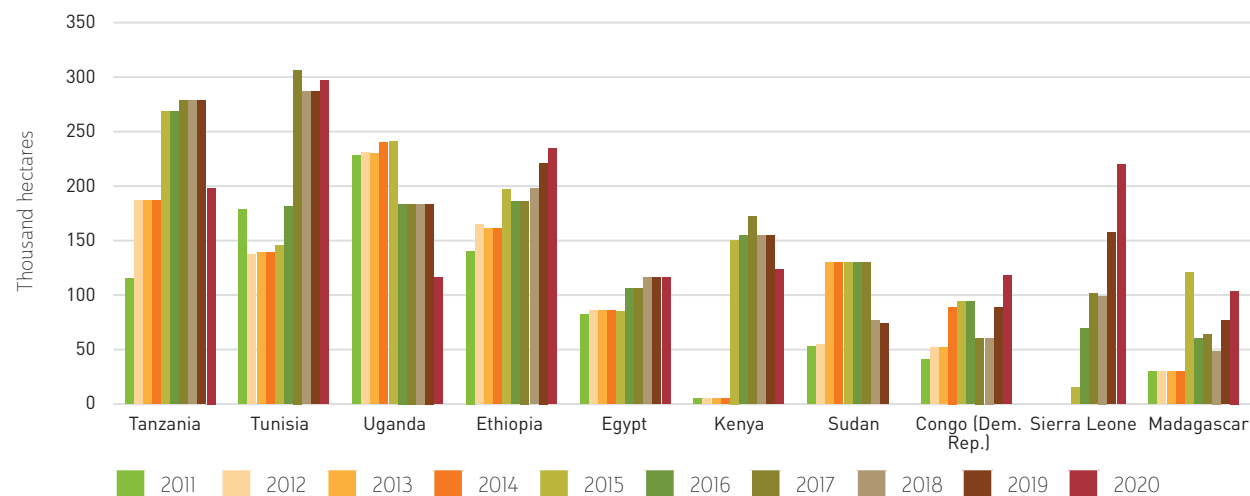
The total area of certified land under organic agriculture in Africa was 2.1 million ha in 2020, almost double that in 2011 (1.1 million ha) (Willer et al., 2022). The countries with the largest organic area (certified and in-conversion) in 2020 were Tunisia (297,000 ha), Ethiopia (235,000 ha), Sierra Leone, Tanzania and Togo (Table 1 and Figure 7). Organic areas are increasing in all countries except for the anomaly seen in Uganda. However, Africa has only 3% of the total organic agricultural land (Figure 4), the lowest of all continents, so there is significant potential for growth.

Table 1: Top 10 countries in Africa with the most organic farmland in 2020 (ACP countries in bold)

Country	Organic area, 2010 [hectares]	Organic area, 2020 [hectares]
Tunisia	2,487	297,137
Ethiopia	123,062	234,648
Sierra Leone	22,512	219,861
Tanzania	85,366	198,226
Togo	3,618	127,782
Kenya	12,647	123,744
Dem. Rep. Congo	1,122	118,254
Uganda	188,625	116,376
Egypt	790	116,000
Madagascar	6,875	103,817

Source: FiBL/IFOAM (2022)

Figure 7: Evolution of organic areas in the top 10 African countries between 2011 and 2020. Source: COLEAD, based on FiBL statistics (2022).



Due to having many smallholder producers, Africa has the second largest number of organic producers of any continent, after Asia. In Africa, Ethiopia had the highest number of producers in 2020 (219,500 producers), followed by Tanzania (148,600 producers) and Uganda (139,000 producers).

Organic farming is strongly promoted in Africa by governments and NGOs, with many research studies showing that it could address a number of challenges on the continent. It is seen by some as a solution for higher yields, more nutritious food, reduced energy consumption and pollution, and increased resistance to drought and flood. The African Ecological Organic Agriculture (EOA) initiative, supported by all African governments towards achieving commitments to the CAADP process, acknowledges the benefits of organic

agriculture and that it should gain more importance (<http://:eoai-africa.org>).

However, research also points to the need for financing (UNCTAD, 2016), and specifically for better access to microfinance. Other requirements for organic agriculture to increase are the need for improved access to markets, certification, standardisation of norms, continuous learning of techniques and knowledge, and the sharing of good practices (ProFound, Markus Arbenz, 2020). Certification is also a challenges for organic agriculture in Africa (FiBL, 2021), being mainly for farmers who want to export their products. Other problems such as a lack of national policies, logistic challenges, limited research and high illiteracy rates also slow down the development of organic agriculture.

3.3. Latin America and Caribbean

In ACP countries of the Latin America and Caribbean region, organic agriculture has developed mainly through funding and technical support to local organic movements by European and North American aid and fair trade agencies, and NGOs. This funding has been mainly for extension and support to producer associations, with fair trade agencies having supported international exports of products such as bananas, coffee, pineapples, orange juice and cocoa.

In 2020, a total of 9.9 million ha were organic (certified or in conversion) in Latin America and the Caribbean. Countries with the largest organic area are Argentina (4.5 million ha), Uruguay (2.7 million ha), Brazil (1.3 million ha), Peru (343,000 ha) and Mexico (216,000 ha). Of ACP countries in the region, the Dominican Republic (117,000 ha) is seventh in the list. All other ACP countries combined account for just over 3,500 ha. However, considering the percentage of organic land in relation to the total agricultural area of a country, the Dominican Republic is in third place with 4.8%, after Uruguay and French Guiana. Grenada is in 15th position with 1.1% of its land organic, the second ACP country in this ranking. Peru has the most organic producers (107,000), followed by Mexico, Brazil, the Dominican Republic, Honduras, Bolivia, and Ecuador.

Table 2: Organic area in Caribbean ACP countries (excluding Cuba) in 2010 and 2020, and organic share of total farmland in 2020

Country	Organic area, 2010 [hectares]	Organic area, 2020 [hectares]	Organic share of total farmland, 2020 [%]
Dominican Republic	165,109	117,312	4.8%
Haiti	134	2,907	0.2%
Belize	476	454	0.3%
Grenada	85	84	1.1%
Suriname	11	52	0.1%
Bahamas	No record	49	0.3%
Jamaica	541	10	0.0%

Source: FiBL Statistics (2022)

Permanent grassland represent 77% of the organic area in Latin America and the Caribbean. However, the region is also one of the major producers of organic tropical fruit, especially Mexico and the Dominican Republic.

Among ACP countries in the Caribbean, the Dominican Republic is the only one with significant production and exports of organic fruit, mainly bananas and cocoa. Prior to conversion to organic agriculture, many smallholder farmers were already using limited inputs, mainly for economic reasons. Therefore, their transition to organic production was relatively simple. Organic production in the Dominican Republic is market-driven and facilitated by fair trade organisations. Today, the Dominican Republic is one of the world's leading exporters of tropical organic produce, especially bananas, mainly to markets in Europe (including the UK) and the USA. Other organic products exported include cocoa, coffee, coconuts, mangoes and pineapples, and especially to the USA and Canada, also avocados, aubergines (eggplants), chilies,

melons, lemons and cucumbers. Professional organisation societies provide technical and financial assistance to farmers, and organic inputs and loans covering up to 70% of production costs. An interview with a government representative in the Dominican Republic revealed that it promotes and certifies organic production through a new department in the Ministry of Agriculture, which is in the process of seeking accreditation itself, that aims to reduce certification costs and limit the impacts of new organic procedures established by the EU.

With the exception of the Dominican Republic, at policy and programme level there is little or no legislative and institutional support in most Caribbean ACP countries to help producers address the various challenges they face.

In Grenada, nutmeg is produced without the use of inorganic fertilizers, and the Grenada Nutmeg Cooperative Association is moving towards low-carbon organic status to improve sales

opportunities in European markets. Suriname and Guyana have good potential for increasing organic production as there is much land available. However, for farmers to access this land may require government policies accompanied by adequate training in organic practices. Currently, only Guyana has taken a advantage of its wilderness, having certified more than 55,000 ha for wild harvesting, mainly of palm hearts, açai palm berries and other tropical fruits, with a cooperative of 500 harvesters in the country (<https://acaipalmito.com/our-products>).

3.4. The Pacific

The Pacific has the highest growth rate of organic production in terms of land area, almost entirely due to the increase in Australia, which has 99.4% of the region's organic land, and about half of all organic land in the world. However, the vast majority of this is grassland, which is not the focus of this study.

The growth of organic agriculture in Pacific ACP countries is strongly supported by government and institutional initiatives, with a trend towards growth in land under organic production and the number of certified farmers. As most organically certified products from these countries are for export, this offers opportunities for high-value, low-volume products in niche markets. In 2021, nine ACP countries in the region exported organically certified products: the Cook Islands, Fiji, Marshall Islands, Niue, Papua New Guinea, Samoa, Solomon Islands, Tonga and Vanuatu (Willer et al., 2022).

In 2020, Samoa had the highest share of organic land compared to total agricultural land (14.5%), followed by Papua New Guinea (6.1%) and Fiji (4.5%) (Table 4). The country with the largest organic area was Papua New Guinea (72,000 ha) followed by Samoa (41,000 ha) and Fiji. Niue and the Cook Islands however, had less than 50 ha of organic land. In 2020, Papua New Guinea had the highest number of organic producers (10,000) followed by Samoa (2,000) and Solomon Islands (900). Vanuatu was well ranked with 2,500 producers in 2016 and 4,000 in 2017, but only had 75 producers listed in 2020, likely to be due to errors or gaps in the country's reported data.

It is important to note that the data depends on the accuracy of the date recorded and reported by countries and certification bodies to organisations such as FiBL and IFOAM.

Organic agriculture in Pacific ACP countries mainly concerns permanent crops, of which coconuts dominate, and production of organic fruit and vegetables is limited and fragmented. Samoa, Fiji, and to a lesser extent Niue and Vanuatu have more diversified organic production, whereas the Cook Islands, Solomon Islands and Tonga produce only one or a few organic crops. Coconut and virgin coconut oil are the most common organic products.

Organic certification in the region is still however in its infancy, though the [Pacific Organic Standard](#) was created in 2011. This covers fruit and vegetables, as well as spices, coffee, cocoa, flowers, cereals, nuts, plants, and sugar. The production of organic fruit and vegetables in ACP-Pacific countries is expected to increase in the coming years, presenting opportunities especially for countries with diverse resources such as Papua New Guinea.



Table 3: Pacific ACP countries with the most organic farmland in 2010 and 2020, and organic share of total farmland in 2020

Country	Organic area, 2010 [hectares]	Organic area, 2020 [hectares]	Organic share of total farmland, 2020 [%]
Papua New Guinea	3,156	72,477	6.1%
Samoa	9,713	40,992	14.5%
Fiji	100	19,303	4.5%
Solomon Islands	1,306	3,367	2.9%
Vanuatu	2,688	2,052	1.1%
Tonga		1,119	3.2%
Niue	159	43	0.9%

Source: FiBL/IFOAM (2022)





4

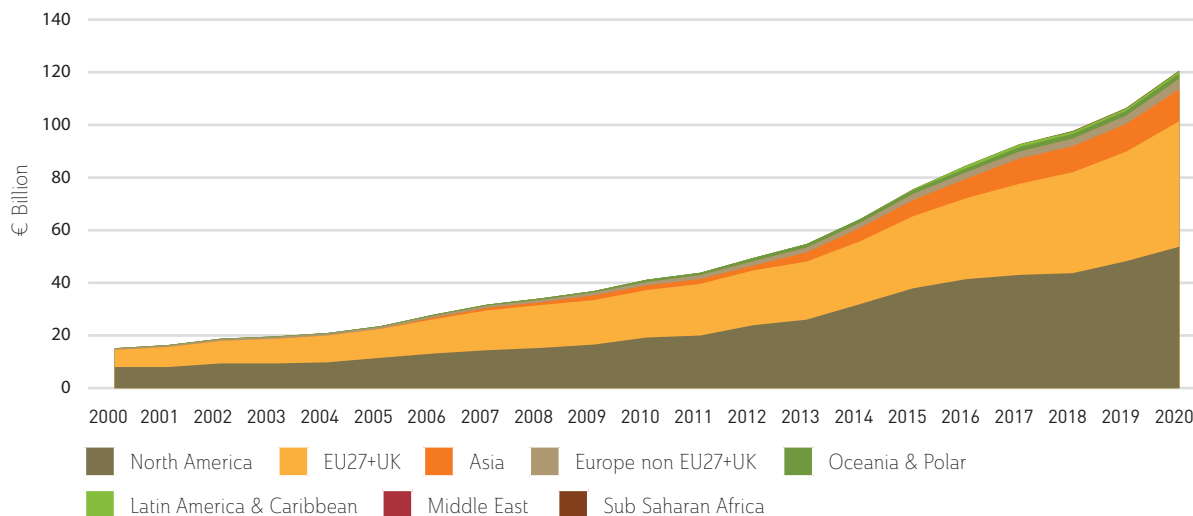
DEMAND FOR ORGANIC FRUIT AND VEGETABLES

This section provides an overview on organic markets, starting with information about global organic sales, followed by details about EU markets and the USA market for organic fruit and vegetables.

4.1. Global markets for organic agri-food products

Although this market study focuses on organic fruit and vegetables, the market figures for organic food demand and sales overall are also interesting to observe. Organic retail sales globally showed strong and consistent growth of 10.4% (CAGR) from 2000 to 2020, reaching €120.6 billion. A main driver for this growth was the increased consumer interest in organic food (Figure 8).

Figure 8: Evolution of global markets for organic retail sales between 2000 and 2020. Source: COLEAD, based on FiBL statistics (2022)



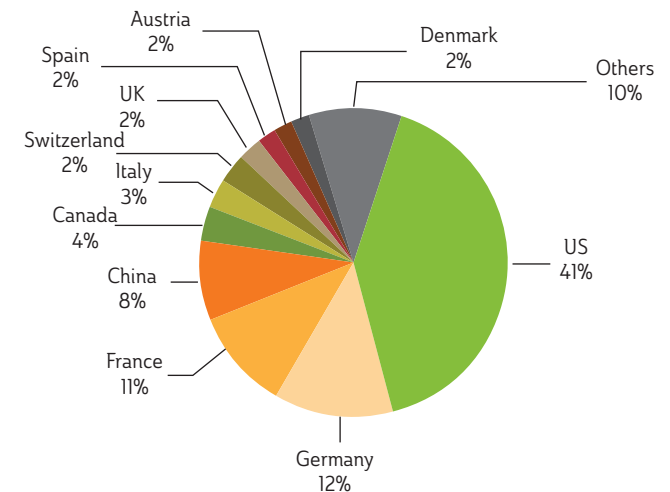
In 2020, the USA and EU27+UK markets together account for 81% (€97.1 billion) of worldwide organic sales and are therefore key target markets for ACP countries. In 2000, those markets accounted for 96% of all organic retail sales, but organic retail sales have increased in Asia with a CAGR of 22.3%, led by China, reaching 10% of the worldwide sales in 2020 (worth €12.2 billion).

Even though Oceania has almost half of global organic land area, its retail sales are very low (around €2 billion in 2020), while Latin America and the Caribbean had less than €1 billion, the Middle East €0.3 billion, and sub-Saharan Africa €0.02 billion.

In terms of single country markets in 2020, after the USA, Germany accounts for 12% of organic retail sales (around a third of EU27+UK retail sales), followed by France (11%), China (8%) and Canada (4%) (Figure 9). Between 2015 and 2020, the highest growth in organic retail sales was recorded for France (+129% overall growth), followed by China (+117%) and Denmark (+95%).

Regarding per capita consumption worldwide of organic food by value in 2020, Switzerland had the highest (€418 per person per year), followed by Denmark, Luxembourg, Austria and Sweden. In North America, consumers in the USA spent €148 per person annually, and €112 in Canada.

Figure 9: Distribution of retail sales per single country markets in 2020 (total €120.7 billion). Source: FiBL statistics (2022)



4.2. The European market

This section presents an overview of retail sales for organic food between 2000 and 2020 for the European region, and organic import data for the EU27 from 2018 to 2021.

4.2.1. Retail sales

The retail sale of organic produce in Europe (EU27 and the rest of Europe) reached almost €52 billion in 2020, including €44.8 billion for EU27 and €2.8 billion for the UK. It shows a steady increase in CAGR of 10% per year since 2000 (Figure 10).

Germany has the highest organic retail sales (€14.9 billion in 2020), representing around 30% of the total for Europe a share that has remained relatively constant. It is followed by France with an increasing share of retail sales, up to 24% in 2020 (€12.7 billion) compared to 14% in 2000. Together, France and Germany account for more than half of Europe's organic retail sales. Italy is the third largest market, but its share decreased from 15% in 2000 to 8% in 2020 (€3.9 billion) as the French market expanded. Switzerland had 7% of the total market (€3.6 billion), the UK 6% (€2.8 billion), and Spain 5% (€2.5 billion). These top six markets account for more than 75% of retail sales in Europe (Figures 11 and 12).

On average, per capita consumption is higher in EU27 countries with an average of €101.80 per person in 2020, as compared to the whole of Europe with €63.30 per person.

Figure 10: Total organic retail sales in Europe (EU27+UK and the rest of Europe) between 2000 and 2020. Source: COLEAD, based on FiBL statistics (2022)

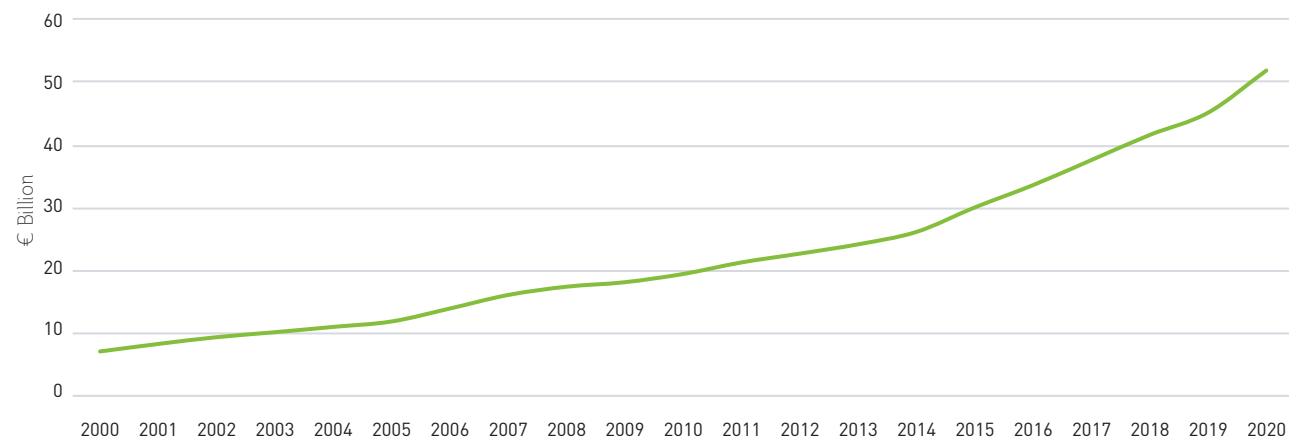


Figure 11: Distribution of organic retail sales in Europe in 2020 (total €51.9 billion). Source: FiBL statistics (2022)

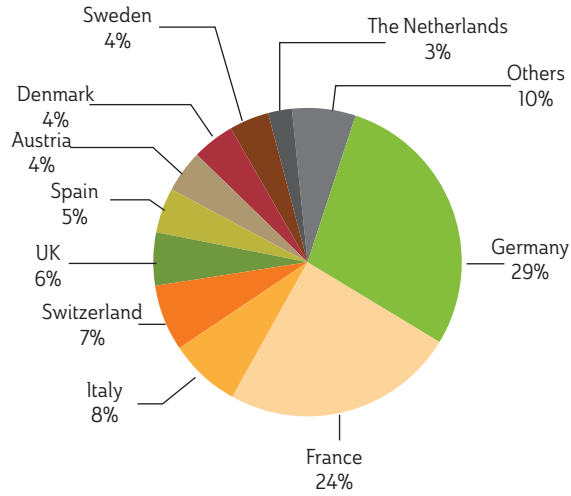
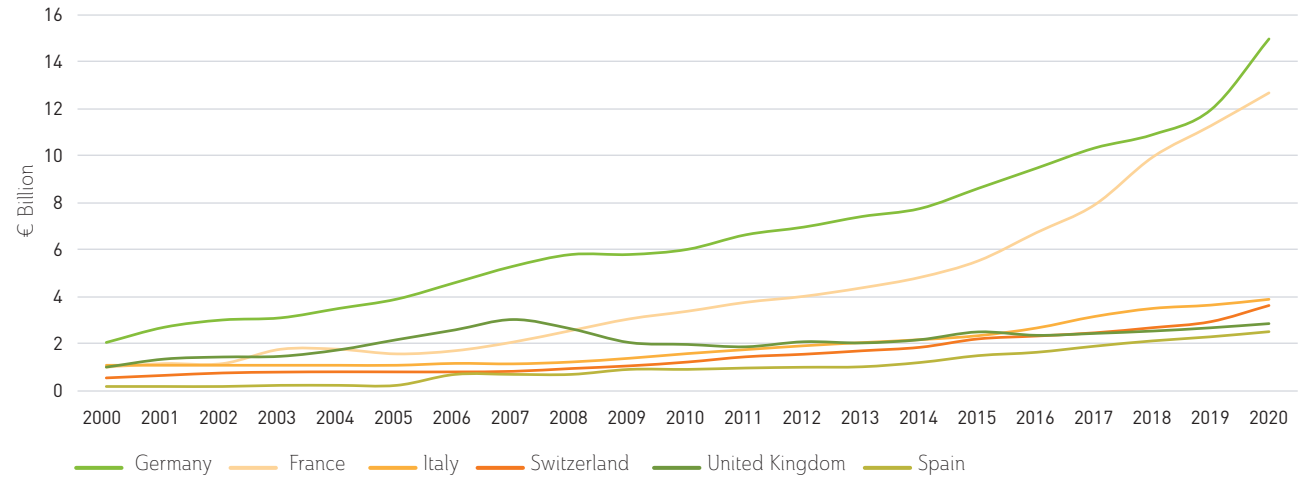


Figure 12: Evolution of organic retail sales for the top six markets in Europe, from 2000 to 2020. Source: COLEAD, based on FiBL statistics (2022)



4.2.2. Imports into the EU27

Separate import statistics for organic products are available from 2018 to 2021 for the EU27, and this section is the only one with data available for 2021. Imports of organic products into the EU27 are analysed for HS Chapter 07 (vegetables), Chapter 08 (fruit and nuts), 20 (processed fruit and vegetables), and ginger from Chapter 09 (HS 091011).

Organic imports of these products into the EU27 increased from 1.07 million tonnes in 2018 to 1.34 million tonnes in 2021, with an annual increase of 5.7% CAGR. Fruit and nuts (Chapter 08) accounted for 76% of imports in 2021 and drove the growth, while ginger (HS 091011) showed the highest increase of 17.3% CAGR between 2018 and 2021 (Figure 13). During the same period, imports of vegetables (Chapter 07) increased annually by 1.7%, fruit and nuts (Chapter 08) by 6.7%, and processed fruit and vegetables (Chapter 20) by 0.8%.

The share of organic imports from ACP countries for the selected commodities increased from 19.6% in 2018 to 25.9% in 2021 (including South Africa, with 7.4% of exports in 2021), with total volumes increasing by 64% from 211,000 tonnes to 347,000 tonnes, compared to an increase of only 15% from the rest of the world during the same period (Figure 14).

The most important single product are bananas, that represent half of total organic imports from these selected commodities, increasing from 530,000 tonnes (49%) in 2018, to 720,000 tonnes (54%) in 2021.

Other organic commodity are imported in much lower volumes, with 38,500 tonnes of ginger in 2021 representing 3% of imports, followed by avocados

Figure 13: Evolution of organic imports into the EU27 of HS Chapter 07, 08, 20 and HS 091011 Ginger, in volume, 2018-2021. Source: COLEAD, based on TRACES (2022)

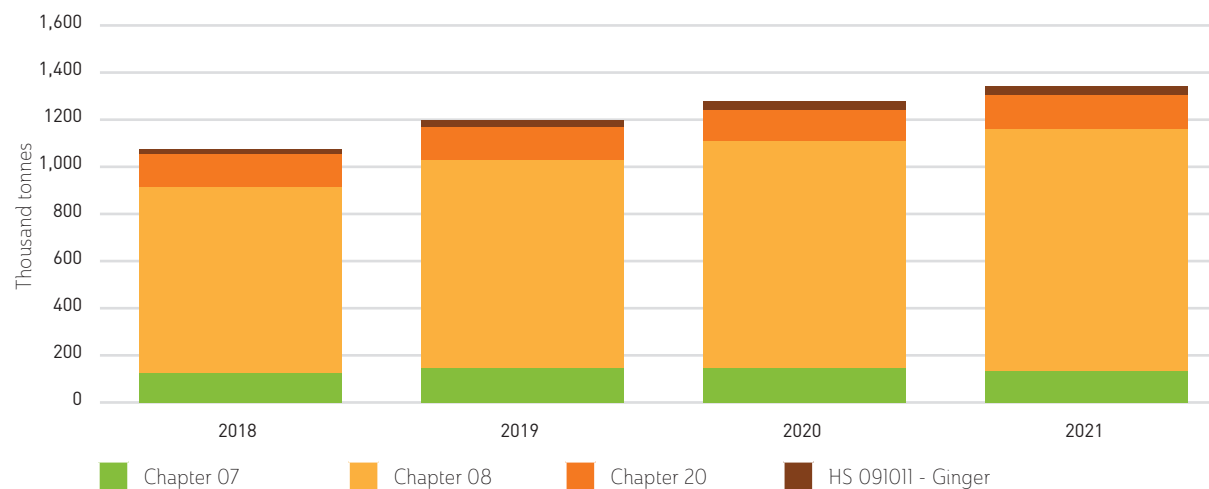
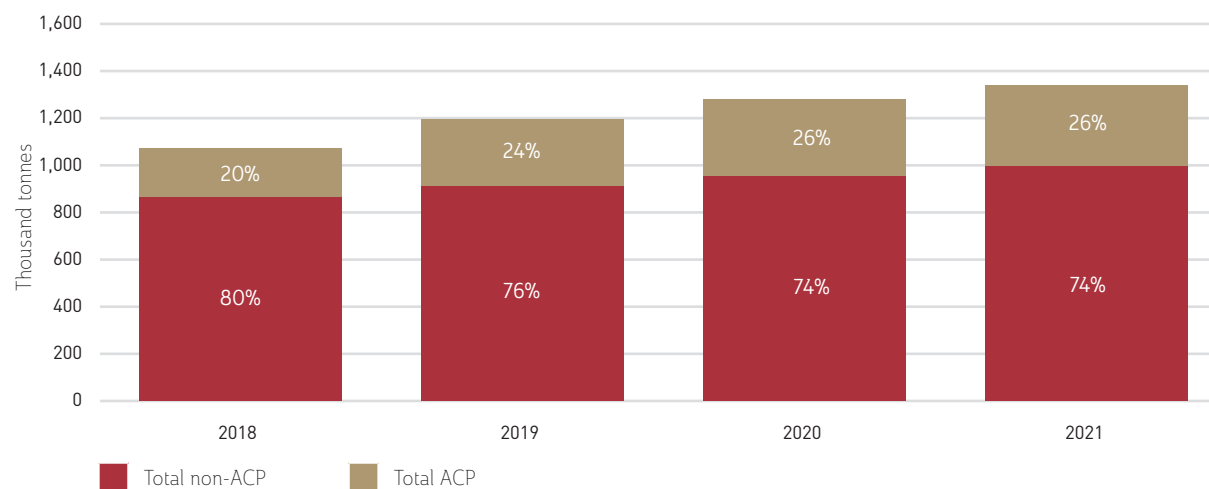


Figure 14: Organic imports into the EU27 of HS Chapters 07, 08, 20 and HS 09101100 Ginger, in volume, 2018-2021. Source: COLEAD, based on TRACES (2022)



(29,700 tonnes), new potatoes (14,500 tonnes) and apple juice (19,000 tonnes) (Figure 15).

When considering imports from ACP countries only (excluding South Africa), the significant share of organic bananas is even higher, reaching 86%

(275,000 tonnes) in 2021, followed by avocados (10,000 tonnes), mangoes (8,200 tonnes), pineapples (4,300 tonnes) and cashew nuts (3,800 tonnes) (Figure 16).

Key products are analysed in further detail in Section 5 (Key exported products).

Figure 15: Top 10 organic imports into the EU27 from the world, of HS Chapters 07, 08, 20 and HS 09101100 Ginger, in volume, 2018-2021. Source: COLEAD, based on TRACES (2022)

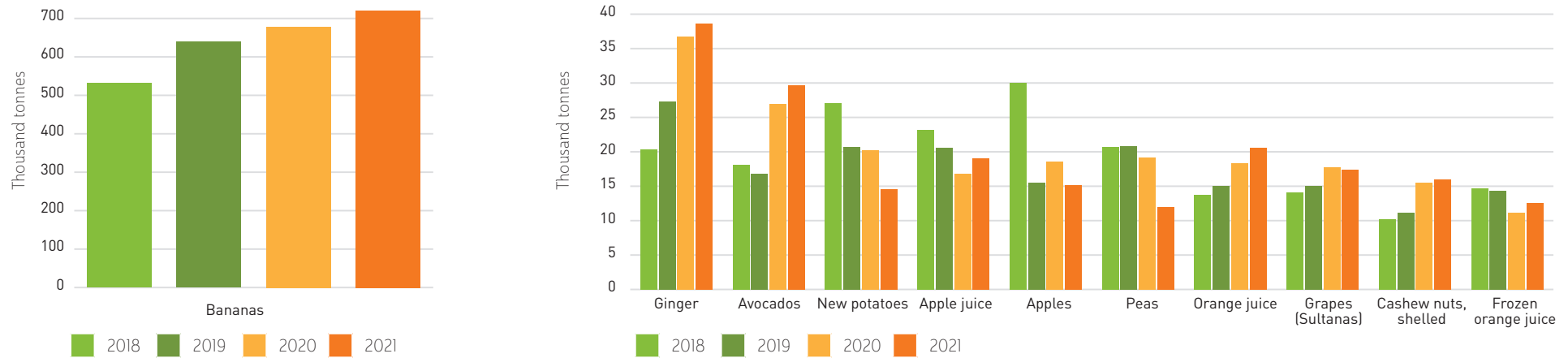
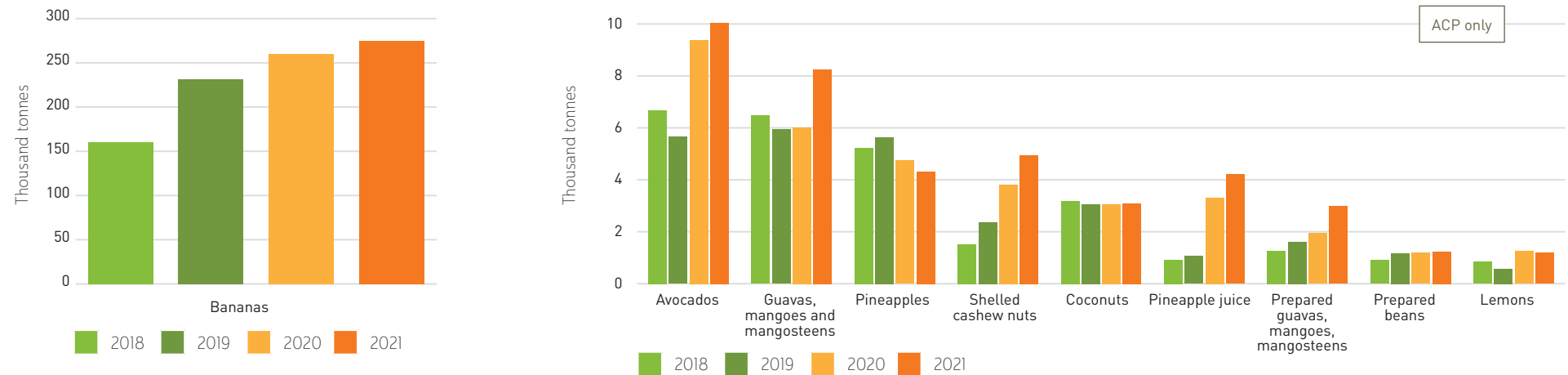


Figure 16: Top 10 organic imports into the EU27 from ACP countries (excl. South Africa) of HS Chapters 07, 08, 20 and HS 09101100 Ginger, in volume, 2018-2021. Source: COLEAD, based on TRACES (2022)



The Netherlands, followed by Germany and Belgium, import the largest amounts, together accounting for 67% of all imports in 2021 (Figure 17). This share is slightly larger (75%) when considering only ACP imports (excl. South Africa). However, many importers, processors and wholesalers are located in these countries and they are important trade hubs that re-exporting to other European countries, and thus their share does not necessarily relate to domestic consumption. For organic fruit and vegetable exporters, these three countries present the most interesting markets for entering Europe.

The four countries that export the most organic fruit, vegetables and ginger into the EU, representing 61% of supply in 2021, are Ecuador with 331,000 tonnes (25%), followed by Dominican Republic with 235,000 tonnes (18%), Peru with 139,000 tonnes (10%) and Turkey with 107,000 tonnes (8%) (Figure 18). Regarding ACP countries, Dominican Republic is the largest supplier to the EU27, followed by Côte d'Ivoire (32,000 tonnes), Ghana (21,300 tonnes) and Kenya (8,200 tonnes). Significant quantities of these export volumes represent organic banana, especially for Ecuador and Dominican Republic, thus exporters from ACP countries should look for more details on other products in Section 5.

Figure 17: Main importing markets in the EU27 from the world for HS Chapters 07, 08, 20 and CN 09101100 (ginger), in volume, 2018-2021. Source: COLEAD, based on TRACES (2022)

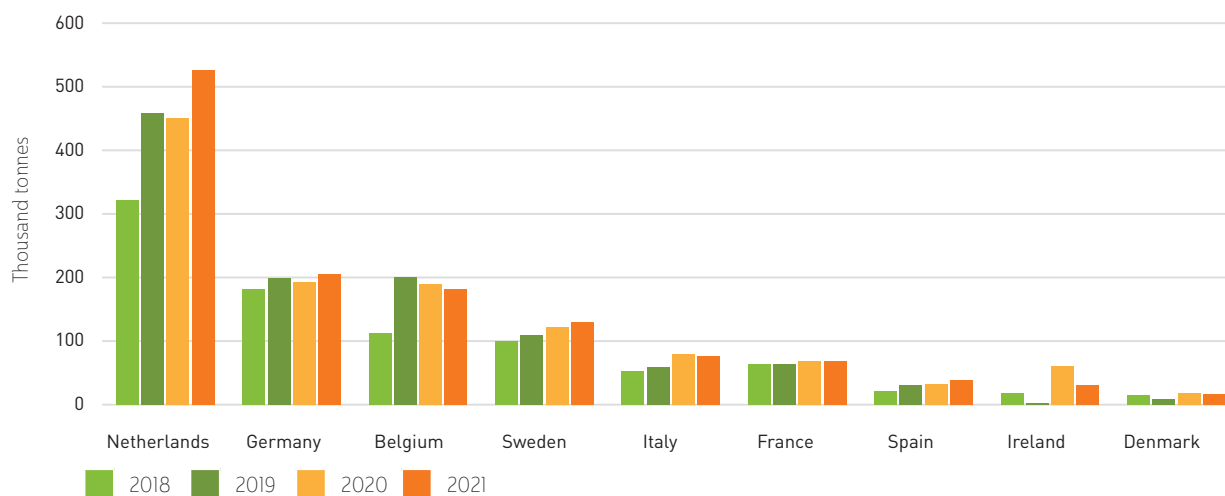
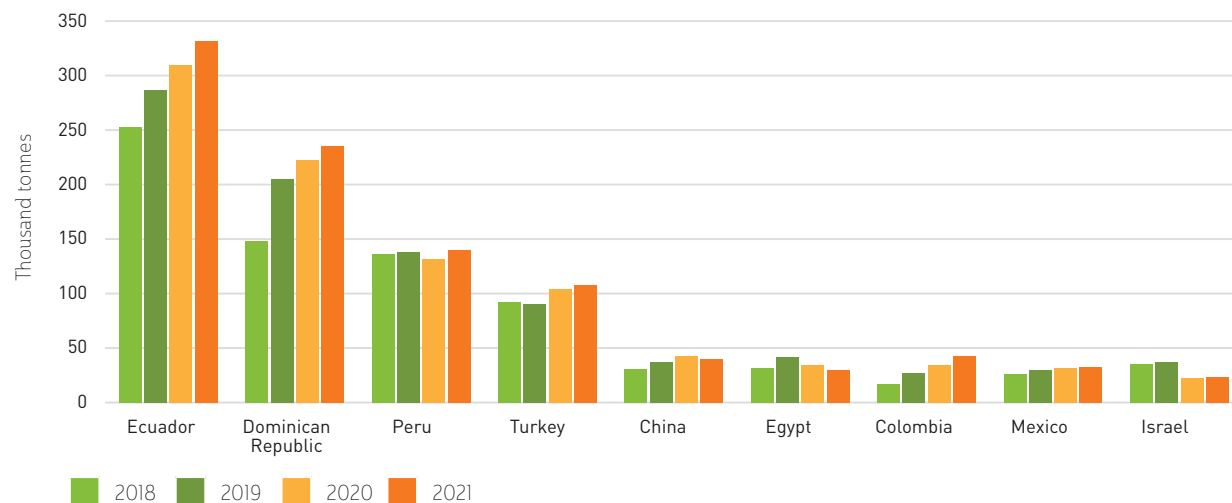


Figure 18: Main organic suppliers to the EU27 for HS Chapters 07, 08, 20 and CN 09101100 (ginger), in volume, 2018-2021. Source: COLEAD, based on TRACES (2022)



TIPS FOR EXPORTERS

For exporters in ACP countries, it is important to find clear advantages over current export countries for the same product category. Possible USPs (unique selling propositions) may be better quality, off-season offer and competitive price, amongst others.



4.3. The North American market

As for the European market, an overview of retail sales for organic food covering the years between 2000 and 2020 for North American (the USA and Canada) is presented, along with an overview of available organic import data for the USA only. Although data is available for specific products there is no global database allowing an analysis as detailed as for the EU, so the analysis is based on available reports for the overview between 2016 and 2020. Organic imports in the USA for 2021, as explained in the methodology, are not currently complete enough to be used.

4.3.1. Retail sales

Based on data from the [Organic Trade Association](#), the country with the largest market for organic food worldwide in 2020 was the USA, worth €49.5 billion (US\$56.5 billion).

The organic retail sales of North America (USA and Canada) have increased with a CAGR of 9.6% between 2002 and 2020, with the USA accounting for 92% in 2020 and Canada 8%. Both countries have a CAGR between 8.8% and 9.7% and follow a similar trend (Figure 19). The main factors for this growth are increasing health awareness among consumers, and increasing environmental concerns due to the heavy use of pesticides, chemical fertilizers and other agrochemicals in conventional farming. It is expected that the USA market will show a growth at a CAGR of 8.7% until the end of 2027 (Blue Weave Consulting, January 2022).

The Organic Trade Association estimated that the largest product category of total organic retail sales (including clothes, meat, etc.) in the USA is organic

fruit and vegetables with 15% of all retail sales in 2020, worth US\$20.4 billion. It is expected that this organic fruit and vegetables will reach around 50% of total organic sales by 2030.

4.3.2. Imports into the USA

According to the [U.S. Organic Trade: data and trends 2016-2020](#) by OTA (Organic Trade Association) and Mercaris, the USA imports of organic food and non-food have shown a high growth between 2016 and 2020, similarly to the retail sales, with a CAGR of 14% per year, reaching US\$4 billion in 2020 or 3 million tonnes. When considering only HS Chapters 07, 08 and 20 (data not available for ginger), the trend is driven by fruit and nuts (Chapter 08) that accounts for 82% of imports for these three chapters (Figure 20).

The main exporting countries of organic food and non-food (Figure 21) contain no ACP countries. India shows a very high growth in exports to the USA, along with Mexico, and to a lesser extent Argentina.

Figure 19: Evolution of organic retail sales in the USA (left) and Canada (right) between 2002 and 2020. Source: COLEAD, based on FiBL statistics (2022)

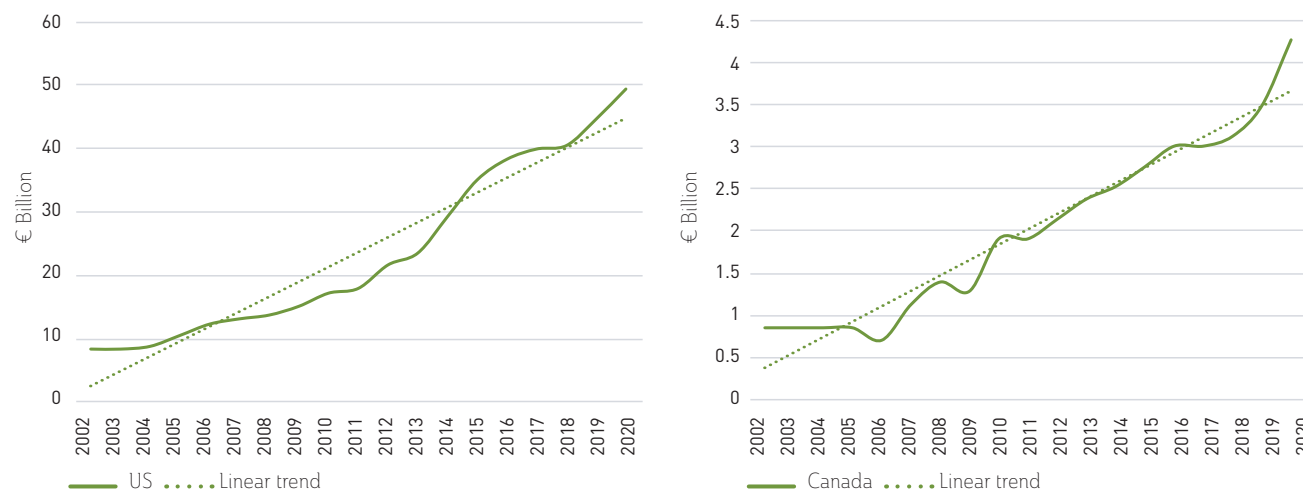


Figure 20: Evolution of organic imports into the USA for Chapter 07, 08 and 20 between 2016 and 2020 in volume. Source: COLEAD, based on OTA and Mercaris (2021)

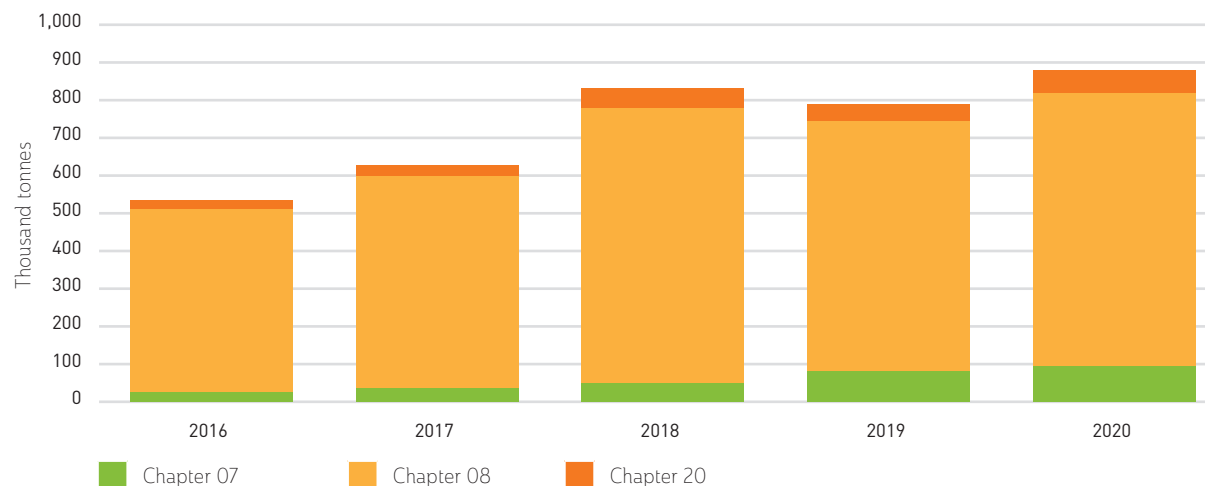
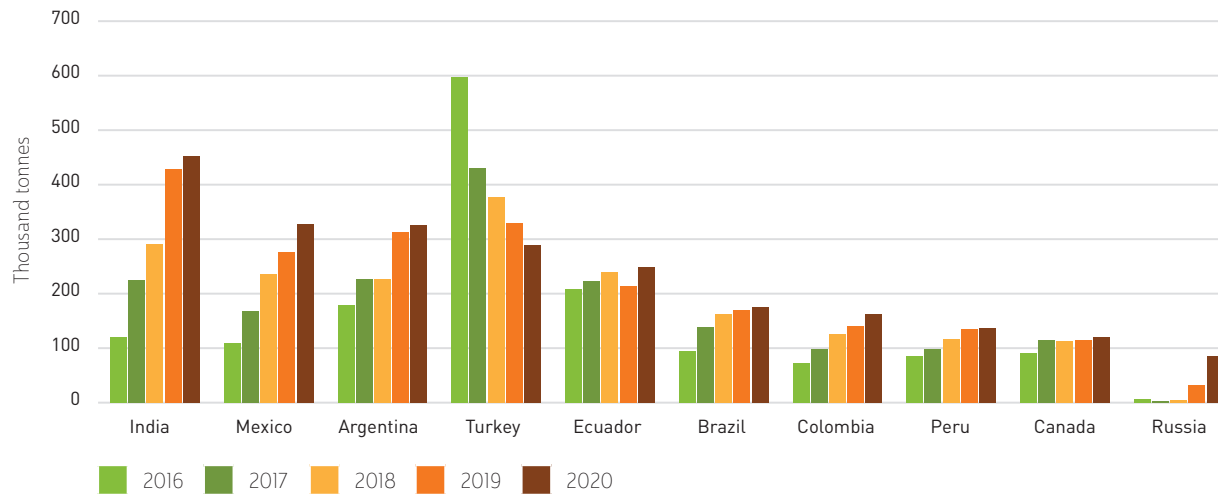


Figure 21: Top 10 suppliers of organic food and non-food to the USA by volume between 2016 and 2020. Source: Organic Trade Association and Mercaris (2021)



Mexico is the main supplier of vegetables (Chapter 07) to the USA, and is second after Ecuador for fruit and nuts (Chapter 08) that include bananas, avocados, coconuts, mangoes, cashews and macadamia nuts. Products and their origins also show the importance of off-season imports. Regarding prepared vegetables, fruit and nuts (Chapter 20), the main imports are apple juice and orange juice, which saw a decline in 2020, and fruit purees commonly used in preparing baby food (OTA, 2022).

TIPS FOR EXPORTERS

For exporting from ACP countries into the USA, it is important to understand that the USA organic food market is divided between online and in store shopping. The market is also highly concentrated among leading players, such as WhiteWave Foods, General Mills, and Hain Celestial Group.



4.4. Other markets

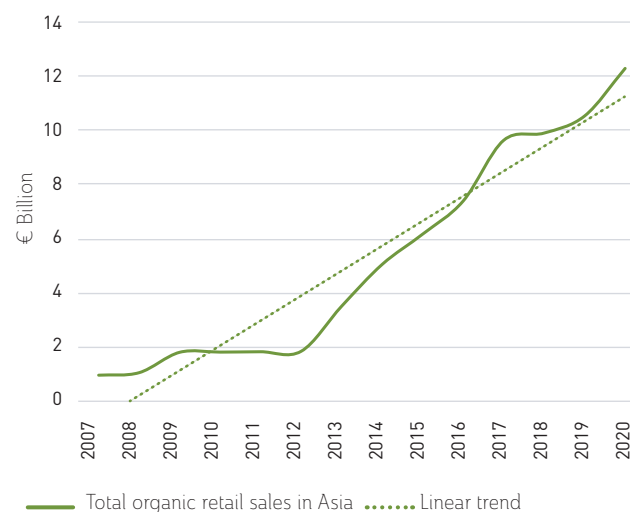
4.4.1. Asian markets

The Asian organic retail sales market represented 10% of worldwide sales in 2020, worth €12.2 billion, largely due to booming consumption in China since 2012 (Figure 22), accounting for 82% of the Asian market. China became the fourth largest organic market in the world in 2020 with 8% of worldwide sales worth €10.2 billion, while there was no record at all of organic retail sales in 2000. Japan with 11% of the Asian market (€1.4 billion) and South Korea with 3% (€0.4 billion) complete the top three.

However, organic retail sales in China represent only a very small share of the total food market (around 1%). The main products consumed are baby food and dairy products. A survey showed that 85.9% of consumers increased their consumption of organic products between 2020 to 2021, and consumer awareness of safe, local, and organic food has increased, with many countries reporting increased sales for organic products (Willer et al., 2022).

Increasing incomes give consumers greater purchasing power, allowing them to consume more organic products that are often more expensive, and are consumed for ecological and food safety reasons. The most important obstacle at present is the lack of legislation on organic products in many countries.

Figure 22: Evolution of the Asian organic retail sales between 2007 and 2020. Source: COLEAD, based on FiBL statistics (2022)



4.4.2. Oceania and Pacific markets

Even though Oceania accounts for half of all organic land worldwide, it accounts for less than 2% of the world's organic retail sales, worth €1.6 billion in 2020, mostly in Australia (€1.4 billion) and New Zealand (€172 million). Organic retail sales in Oceania have grown with a steady 12% CAGR since 2009 (Figure 23).

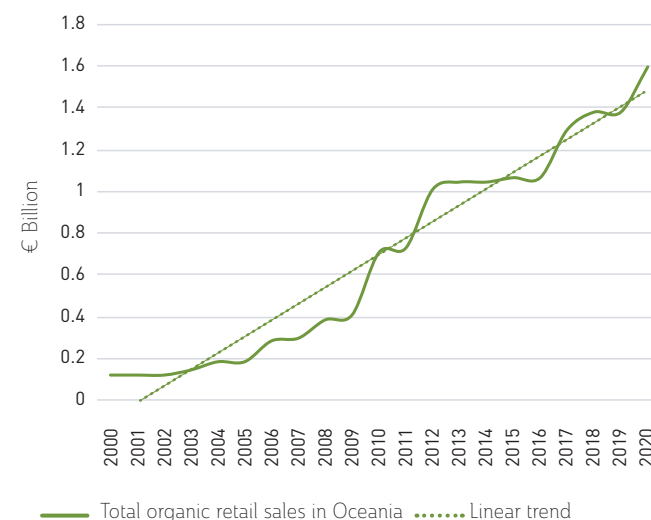
In 2020, average consumption was €55 per capita in Australia and €33 per capita in New Zealand according to FiBL and IFOAM - Organics international.

Sales figures for the Pacific markets are unavailable. Most certified organic products from the Pacific are exported (Willer et al., 2022), and most organic fruit and vegetables from Pacific ACP countries are exported to Australia, New Zealand and New Caledonia (COLEACP, 2022).

Pacific ACP countries have also been developing an interest in 'organic tourism', where organic producers and tourism structures cooperate to promote Pacific organic food to tourists, amongst other local products.

With border closures and a drop in tourism, the COVID-19 pandemic forced producers to seek to expand to domestic market opportunities. This gave a boost to the trend of growing local markets through increased awareness, basket schemes, unverified organic claims on labels, development of participatory guarantee systems (PGS) and more organic stalls at farmer's markets. The local market for organic products is expected to expand as tourism increases, and hospitality industries look towards organic products and sustainability as part of the Pacific Islands brand.

Figure 23: Evolution of organic retail sales in Oceania between 2000 and 2020. Source: COLEAD, based on FiBL statistics (2022)



4.4.3. Latin American and Caribbean markets

The organic market in Latin America is small compared to other regions, and there is limited data for retail markets. The region is mainly concerned with the export of organic products. The marketing and consumption of organic food in Latin America is directed towards the tourism sector, especially hotels and restaurants. A report by Research and Markets estimates that the organic food and beverage market in Latin America amounted to US\$1.44 billion in 2020 (€1.38 billion), of which organic fruit and vegetables contributed 51% (Research and Markets, 2022).

The largest organic market in Latin America is Brazil, estimated at €778 million in 2020. Recent political turmoil and economic crises in the country are slowing the growth of this market, although consumers are increasingly interested in healthy and sustainable products. Distribution channels are diversifying, although there are not yet many specialised organic shops.

Unfortunately, there is no data on organic markets in Caribbean countries. Anecdotal evidence and news articles suggest that the market is small but developing, which is also influenced by interests of tourists in organic food products (Boys et al., 2014).

4.4.4. African markets

The market for organic products is very small in Africa, and almost none is recorded by FiBL and IFOAM Organics international. Organic products are mainly intended for export, organised directly by importers to meet the specifications for export. Low local demand is also explained by a lack of purchasing power, and limited knowledge and awareness of organic products, especially in the distinction of self-claimed and certified organic products.

Demand for organic products is limited in Africa, except for South Africa where demand outstrips supply (GIZ, 2021). However, consumer concerns over food safety could drive local organic markets in the continent. In larger cities, organic shops and the supply of organic produce is growing to accommodate the increasing demand especially amongst wealthier consumers and expatriate.

Burkina Faso, Senegal and other countries have been building local markets for organic products through the development of participatory guarantee schemes (PGS). Also, AMAPs (Associations pour le Maintien d'une Agriculture Paysanne) have been created in Benin, Mali, Senegal, Togo and Uganda. These initiatives seek to develop peasant and organic agriculture among the population by linking producers directly with consumers. In addition, there is some local trade in organic products that are not verified by third parties.

4.5. Factors influencing organic markets

Global markets provide ACP countries the chance to export into regional and international markets, but exporters may face huge challenges from changes in global supply chains due to changes in political situations and market and consumer requirements.

The following factors are relevant for most food markets, with a focus on organic fruit and vegetables included where possible.

4.5.1. Competition on global markets

All tropical countries have the opportunity to export fresh fruit and vegetables, but between countries there is strong competition to reach the main markets defined above. It is important for exporters from ACP countries to define clear advantages over other exporting countries. It is a challenge for buyers to change suppliers, therefore there must be good reasons to take the risk for new import-export relations. Possible USPs (unique selling propositions, or UBRs (unique buying reasons) may be a better price, quality of produce or off-season supply.

For exporters of organic fruit and vegetables, it is also relevant to know the capacities and potential export volumes of other regions that produce organic fruit and vegetables. For example, organic tropical and subtropical fruits are grown mainly in Latin America (on 113,000 ha in 2020) with the highest shares in the Dominican Republic, Mexico, Ecuador and Peru, dominated by bananas, then in Africa (69,000 ha) and Asia (62,000 ha). With temperate fruits, competition is highest from Europe and Asia (mainly China). The production area for apples, apricots and pears accounts for almost

two thirds of all land where organic temperate fruits are grown (64%). The Dominican Republic has the fifth largest area of organic citrus fruits (11,500 ha), after Italy, Mexico, Spain and China. ACP countries also face competition from most regions in terms of the production of organic vegetables.

Further details about land use can be found in Section 3, with details on specific fruit and vegetables in Section 5.

4.5.2. Impact of global influencing factors

The following describes the most important market developments on political and trade levels, focusing wherever possible on organic fruit and vegetables.

COVID-19

The COVID-19 pandemic, including lockdown periods, tremendously changed people's purchasing and cooking behaviour. Food sales in supermarkets increased rapidly, even faster within the organic market. For example, in 2020 the growth of the organic market in Germany was twice as strong as the general food market. Health, environment, and climate change have become important topics for food choices. In the long-term, it is expected that the awareness of these reasons for buying organic will remain the same, but growth will slow down because of increasing prices for many other consumer products.

For exporters of fresh fruit and vegetables, there are various challenges to tackle because of COVID-19. A lot of exotic fruit and vegetables are transported in the hold of passenger aircrafts. With the limited cargo aircraft capacity, competition is high to get products on available cargo freighters and the airfreight costs increased significantly. Additionally, not all routes are available anymore, shipping capacities are still lower than normal and

extra ocean freight surcharges are common. See COLEAD (2022) '[Logistics in the ACP-Caribbean countries](#)' for more details on airfreight and other logistic options for the Caribbean region. Additionally, supply chains face challenges such as a lack of workers to harvest crops and an increase in logistical costs. The war in Ukraine war has also led to increased fuel prices that affect cold storage and transport costs in this highly volatile fresh food market.

TIPS FOR EXPORTERS

Check CBI's Market study "How to respond to COVID-19 in the fresh fruit and vegetables sector": <https://www.cbi.eu/market-information/fresh-fruit-vegetables/how-respond-covid-19-fresh-fruit-and-vegetables-sector>

Increasing politicisation of (organic) agriculture

Global agriculture is at a crossroads. New technologies that increased yields with fertilizers and pesticides transformed the agricultural landscape substantially over the past half century. As a result, agricultural productivity has been brought to new levels to meet growing global demands. However, these developments have been accompanied by negative social and environmental impacts such as soil degradation, loss of biodiversity, water and soil pollution, and an increase in greenhouse gas emissions. Ecosystems are under pressure worldwide, which not only threatens the production potential of natural resources, but also endangers the future fertility of the planet (FAO, 2018).



Figure 24: Example of messages to politicians for organic agriculture. "Food is now Policy!" (January 2020, Berlin): 35,000 people demand a reform of European Agrar funds for farmers, animals and the environment. Banner translations: "Stop financing the (conventional) food industry", "For fair and ecological agriculture", "In future we will eat organic or not any more". Picture credit: Nick Jaussi, www.wir-haben-es-satt.de

Consumers are increasingly fighting for the importance of organic and sustainable food production, and express this through demonstrations and other ways to send messages to politicians (Figure 24). This highlights the likelihood for the increased importance of organic food production in the future.

Demand for local produce is becoming a key driver of EU consumption and distribution, with buyers tending to look for local products rather than organic products. This seems to be a recent trend that is putting some wholesale operators who specialise only in organic produce in difficulty.

UN Sustainable Development Goals and European Green Deal

A number of United Nations and European action plans encourage the increase of organic production and making supply chains more sustainable. These are drivers for changes and may be used for ACP exporters to lobby their governments to increase support for logistics and export facilitation to reach out to international and especially European markets.

In 2016, all UN member states adopted the 2030 Agenda for Sustainable Development, an action plan based on 17 Sustainable Development Goals (SDGs) to address the key global challenges of the next 15 years. Addressing these complex challenges and achieving the SDGs requires a holistic approach built on the principles of economic, social, and environmental sustainability.

Organic agriculture supports many of the SDGs, including SDG 2 (no hunger), SDG 3 (good health), SDG 6 (clean water and sanitation), SDG 8 (good jobs and economic growth), SDG 12 (responsible

consumption), SDG 13 (climate action), SDG 14 (life below water), and SDG 15 (life on land).

To implement the SDGs in Europe, the European Commission published a new growth strategy in December 2019 with the vision of climate neutrality for the EU by 2050. The European Green Deal covers several sectors. The 2020 Farm to Fork (F2F) (https://food.ec.europa.eu/system/files/2020-05/f2f_action-plan_2020_strategy-info_en.pdf) and the EU Biodiversity (https://environment.ec.europa.eu/strategy/biodiversity-strategy-2030_en) strategies included in the Green Deal aim to support the achievement of goal of transitioning to sustainable food systems by 2030.

The Farm to Fork (F2F) strategy is a comprehensive ten-year plan to drive the transition to a fair, healthy and environmentally friendly food system in Europe and to reduce negative impacts on developing countries. It aims to develop a food policy that proposes measures and targets for every stage of agri-food value chains, from production to distribution and consumption.

There are four key elements in the F2F strategy relevant to organic agriculture (Willer et al., 2022).

- ← By 2030, reduce the use and risk of chemical pesticides by 50% and reduce the use of more hazardous pesticides by 50%.
- ← Reduce nutrient losses by at least 50% while ensuring that there is no degradation of soil fertility. This will reduce fertilizer use by at least 20% by 2030.
- ← Reduce total sales of antimicrobials for farm animals and aquaculture in the EU by 50% by 2030.

- ← 25% of agricultural land to be farmed organically by 2030. Currently, 9.2% (14.9 million ha) of agricultural land is organic.

The promotion of organic agriculture therefore plays a central role in the implementation of the Farm to Fork strategy, as well as for implementation of the SDGs. This means that these strategies must be considered when importing into the EU.

TIPS FOR EXPORTERS

For information and tips, check CBI's article [The EU Green Deal – How will it impact my business?](https://www.cbi.eu/market-information/eu-green-deal-how-will-it-impact-my-business)

Brexit

The 27 EU member states export over 3.2 million tonnes of fresh fruit and vegetables (organic and conventional) to the UK each year, representing 40% of the UK's demand (<https://freshfel.org/so-far-worst-case-scenario-avoided-but-brexit-impact-on-fresh-produce-mounting/>). The Brexit withdrawal agreement signed in January 2020 ensures a continuous supply of fresh fruit and vegetables from and via mainland Europe. Therefore, direct impact for trade within the fresh produce sector is limited, but businesses need to calculate significant additional costs due to new operational procedures, inspections and associated bureaucracy. These costs are especially challenging for small companies, and some have already stated

that are unable to continue trading between the UK and EU27.

Currently, all EU rules and regulations for the organic food sector still apply, as the UK remains in the EU customs union and single market for the duration of the implementation period. The EU has agreed to recognise the UK as equivalent for organic produce until 31 December 2023, and for further information, see www.soilassociation.org.

TIPS FOR EXPORTERS

If you would like to export to mainland UK or Northern Ireland, please contact your local export control body for specific requirements regarding the GB Col (GB Certificate of inspection).

A very useful video guide about importing and exporting after Brexit is published by the Soil Association:

<https://www.soilassociation.org/certification/food-drink/certification-resources/importing-after-brexit/>

Political changes in the USA

Following the election of President Biden in early 2021, the secretary of agriculture Thomas Vilsack supported more expertise and new positions within the US administration, and the Organic Trade Association (OTA) produced the Good organic retail practices 2022 guide (GORP). This provides best practices for handling, storing, and selling organic

products in the USA, and helps retailers to ensure organic compliance, establish best practices to build consumer confidence, and to protect the integrity of organic products. Within this the new and emerging retail environment, the organic industry can be expected to change significantly.

TIPS FOR EXPORTERS TO THE USA

The map or country list on OTA page provides an overview on import barriers for exports into the USA, with policy details for most countries - <https://globalorganictrade.com/>

4.5.3. Food consumption trends

Healthy eating habits and the growth of specific dietary needs are important drivers for new product categories, changes in distribution channels, and changes in consumption patterns. Consumers are also increasingly concerned about social conditions of farm workers, the impacts of production on the climate, and the need for more sustainable use of resources such as water, soil and energy. One response to this is that a trend for some producers and manufacturers to sell and/or process food more locally and advertise this accordingly.

Consumer awareness of the impacts of food on their health has also increased in recent years, including a preference for a diet that is free of pesticide

residues and those of other agrochemicals. Also, more consumers want to improve their health by adopting a more varied and balanced diet. They favour products rich in vitamins, calcium and fibre, among others, and consume more fresh fruit and vegetables, while increasing their dietary diversity. The following trends are encouraging the consumption of organic fruit and vegetables.

- ← **Veganism/vegetarianism:** eating no meat or no animal products at all.
- ← **Clean food/clean eating:** consumption of food as created by nature, without any additives, artificial components or pesticides.
- ← **Soft health:** consumption of fruit and vegetables in form plant-based and vegan recipes.
- ← **Do-it-yourself food:** consumption of self-prepared, creative food, preferably with fruit and vegetables produced organically in one's own garden.
- ← **Buying local:** while exotic tastes are in demand, there are increasing concerns regarding the carbon footprint or use of water in the production of tropical and subtropical fruits. This impacts organic fruit, as some exotic fruit are replaced with locally sourced products.
- ← **Food rescue:** a growing number of 'foodsavers' that buy 'rest food packages' at the end of the day, buying unharvested food from fields or collecting food thrown away by retailers or wholesalers.

These trends were reinforced by the COVID-19 pandemic, and support the increasing consumption of organic food (free of additives, caring for resources) and the increasing consumption of fresh fruit and vegetables (healthy, clean, vegan) (www.theceomagazine.com/lifestyle/food-beverage/global-food-trends/ and www.isi.fraunhofer.de/content/dam/isi/dokumente/ccv/2019/50-trends-influencing-Europes-food-sector.pdf). The last two trends of buying local and food rescue are taken up by retailers with campaigns to 'buy local' and by manufacturers who are producing using farm waste (BioFach 2021/2022 consumer and innovations trends).

The following are some example of products that represent these trends.

The following general trends impact fruit and vegetables, therefore also organic fruit and vegetables markets in the EU and USA.

- ← **Organic as a 'climate saver':** an increasing number of consumers in Europe and North America are sensitive to climate change and environmental protection in general. Organic produce is often associated with this theme, as pesticides and harmful chemicals are not used in their production.
- ← **Digitalization of trade:** many online platforms and apps now exist for online purchasing organic / healthy / vegan products than can be delivered directly to consumers. This trend is relevant for organic fruit and vegetables as they are also part of online crowd funding projects (buying directly from producers), food box schemes or 'too good to go' platforms offered by retailers in some European countries.

- ← **Increasing interest in exotic flavours and ingredients:** consumers increasingly explore new recipes and ingredients, in part stemming from COVID-19 lockdowns, and that has increased the consumption of imported tropical fruit and vegetables.

TIPS FOR EXPORTERS

Within social media, such as Facebook, online offers of small producers and crowd-funding projects are gaining popularity. For example, Vegan Bowls from Every-Foods in the Netherlands (<https://every-foods.com/>) or Crowd Farming to buy blueberries or avocados on Facebook.

An organic smoothie with tropical fruit as alternative healthy snack.
Source: BIOFACH exhibitor directory 2020



Spreads made from fruit or vegetables, such as mango or coconut.
Source: BIOFACH exhibitor directory 2020



A vegan, gluten free organic pasta produced with organic peas.
Source: Rewe supermarket online/ organic range



A vegan snack produced from organic chickpeas.
Source: BIOFACH Exhibitors list 2020



A vegan burger patty including climate neutral certification.
Source: Lidl Discounter Germany





5

KEY EXPORTED PRODUCTS

This section discusses organic markets in the EU27 and the USA for specific products. Organic imports into the EU27 are given for 2018 to 2021, and organic imports into the USA for 2016 to 2020, based on available data.

The following products were selected for their significance to the organic market, their importance in ACP countries, or as emerging organic products that offer to opportunities for ACP exporters (Table 4).

Table 4: Selected key products

Organic fruit and nuts	Organic vegetables and spices
<ul style="list-style-type: none"> • Avocados • Bananas • Cashew nuts • Coconuts • Mangoes • Pineapples 	<ul style="list-style-type: none"> • Ginger • Onions • Pulses • Tomatoes • Sweet potatoes

In addition, Section 5.3 provides information and recommendations for ACP exporters to find the international price for their products, and to help them to determine their own export prices.

5.1. Organic fruits and nuts

This section focuses on the potential for the following organic fruit and nuts which are relevant for the EU and USA markets.

- ← **Avocados and mangoes** – well suited to healthy food trends and the demand for exotic flavours, but carry environmental challenges for consideration.
- ← **Bananas** – demand is still growing in the EU27 and USA. Except for Dominican Republic, ACP countries do not play an important role in this market, but bananas are the most traded tropical fruit so an overview is provided to manage expectations about the export market potential.
- ← **Cashew nuts** – a valuable product for healthy snack products and for the vegan market.
- ← **Coconuts** – derived products show strong growth for the EU27 and USA being increasingly used in processed foods and especially in allergic and vegan products.
- ← **Pineapples** – imports into the EU and USA decreased during the COVID-19 pandemic, but they are still the second most traded tropical fruit globally, with potential for some ACP countries.



5.1.1. Avocados



The world market for avocados is very dynamic for both conventionally and organically produce, with unbalanced supply and vastly growing demand. In years with high available supplies, larger volumes have been pushed into the market to boost consumption, along with lower prices. For example, in a peak production year of 2018, prices decreased by 30%. The main suppliers of avocados are Mexico, Peru, Chile, Colombia, Kenya, South Africa, and Spain. Companies in the avocado business tend to be large and have a high level of professionalism. The main variety on the market is Hass, with others including Fuerte, Pinkerton, Ettinger, Reed, Ryan and Zutano.

The market for organic avocados is currently small but growing substantially. Organic avocados are of particular interest for consumers that value the health benefits of this fruit. In 2020, organic avocado imports into the USA and EU27 combined, amounted to 76,400 tonnes. This indicates a market share compared to total avocado imports of around 5% in both markets. This figure is similar to organic mangoes in the EU, higher than that for organic pineapples (1% in EU/USA), but lower than that for organic bananas (more than 10% in EU/USA).

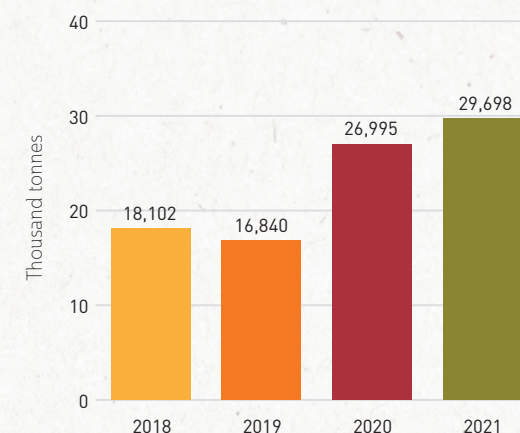
The main challenge of this sector is the increasing consumer concern regarding environmental issues surrounding avocado production. Large quantities of water are required for good yields, as well as concerns over deforestation and supply chain transparency. Although there have been little impact on consumption to date, these perceptions can influence certification pressures and sourcing preferences. Exporters will be expected to demonstrate good production practices to potential buyers.

It is expected that avocados will become the second-most traded tropical fruit by 2030, after bananas, pushing pineapples into third place (OECD/FAO, 2021), as a result of growing global demand for avocados and major investments in production, with the USA staying the main market followed by the EU27.

EU27: +13.2%/year since 2018

Imports of organic avocados into the EU grew from 18,000 tonnes in 2018 to 29,700 tonnes in 2021, an annual increase of 13.2% (Figure 25). Imports of conventional avocados increased by 6.7% annually in the same period. In 2021, imports of organic avocados into the EU27 were 4.4% of total avocado imports.

Figure 25: Evolution of organic avocado (HS 080440) imports into the EU27, 2018-2021. Source: COLEAD, based on TRACES



The main suppliers of organic avocados to the EU are Peru, Kenya and Mexico, together accounting for more than 81% of all organic avocado imports in 2021 (Figure 26). Morocco and Tanzania also increased their exports to the EU27 in 2020 and 2021.

The two largest EU national markets are Spain and the Netherlands, together accounting for 95% of all imports (Figure 27). Spain (49%) is a major consumer and producer of avocados, and also a large processor (especially for making guacamole), and exporter of avocados in to other European countries. Spanish traders increasingly purchase organic avocados to supplement their own production. The Netherlands (46% of imports in 2021) is the second main trade hub, being home to several major avocado importers, and where avocados are ripened and distributed to elsewhere in Europe, such as Germany, France, the UK, and Scandinavian countries.

TIPS FOR EXPORTERS

Read up on the European market potential for avocados, and entering the European market for avocados, on the CBI website: <https://www.cbi.eu/market-information/fresh-fruit-vegetables/avocados>

Figure 26: Evolution of organic avocado imports into the EU27 by top exporting countries, 2018-2021. Source: COLEAD, based on TRACES

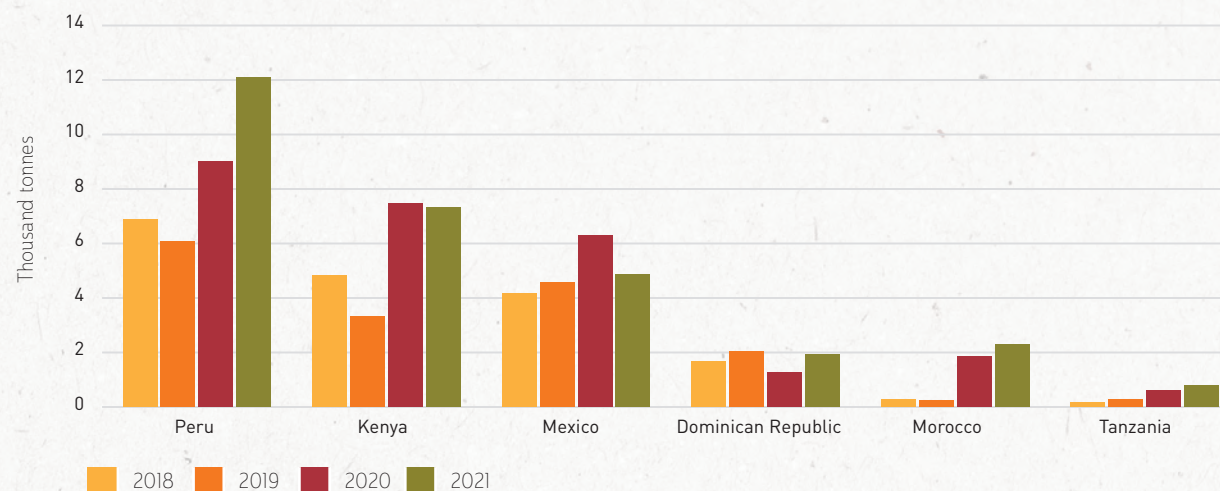
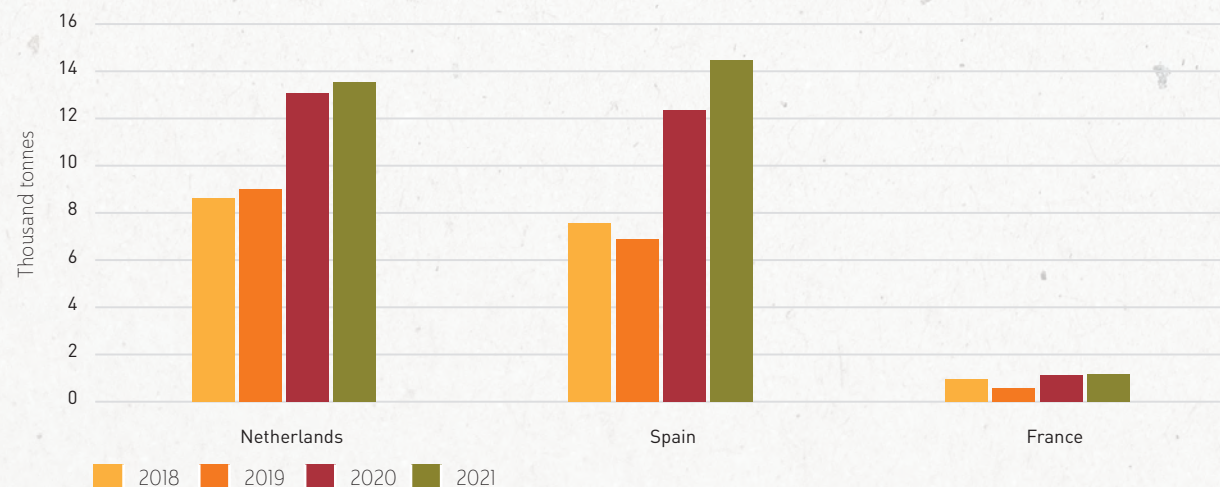


Figure 27: Evolution of organic avocado imports into the EU27 by main national market, 2018-2021. Source: COLEAD, based on TRACES



USA: +12.2%/year since 2016

Organic avocado imports into the USA were 49,400 tonnes in 2020, up from 27,798 tonnes in 2016 with an annual growth of 12.2% (Figure 28). This is more than double the imports of the EU27. Organic avocados represented 4.42% of total USA avocado imports in 2020, similar to the EU, a percentage that has remained constant since 2017, as the organic and conventional markets have grown at the same pace.

The main supplier to the USA is Mexico, which accounted for 89% of imports in 2020 (44,000 tonnes), followed by Peru (5,125 tonnes) (Figure 29). Mexico is the largest producer and exporter of avocados in the world and has a strong focus on the USA as a destination market. The country can produce avocados all year round.

Figure 28: Evolution of organic avocado imports into the USA, 2016-2020. Source: COLEAD, based on UN-Comtrade

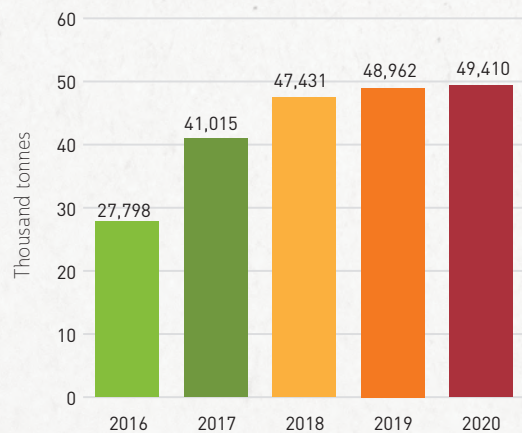
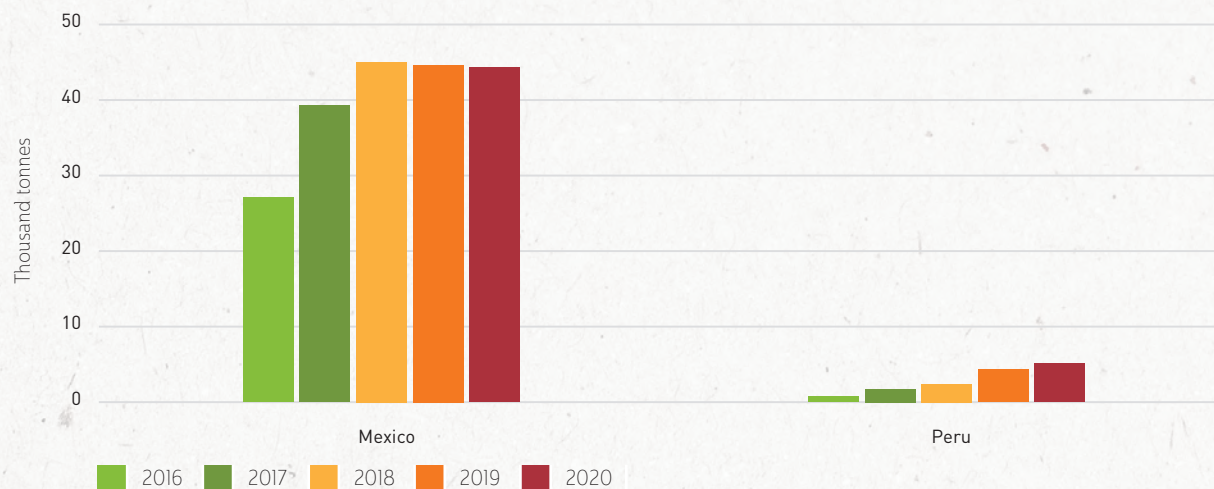


Figure 29: Evolution of organic avocado imports into the USA by exporting country, 2016-2020. Source: COLEAD, based on UN-Comtrade



5.1.2. Bananas



Bananas are the most traded tropical fruit. Production and trade were affected by the COVID-19 pandemic, especially for suppliers from Asia and Africa, but the sector proved to be more resilient than expected (FAO, 2021). Especially in Latin America and the Caribbean, production disruptions were minimised by large scale producers who kept sufficient workers in plantations.

Trade in bananas is strongly influenced by trade agreements and agricultural investments. It will also be influenced by Panama disease, that has already affected plantations in Asia, Africa and, more recently, in Colombia and Peru, and is threatening producers in Ecuador and Costa Rica. The disease could lead to a shortage of bananas, which can force buyers to diversify their sourcing origins (<https://www.cbi.eu/market-information/fresh-fruit-vegetables/what-demand>).

Organic bananas are increasing their share of total banana imports, as imports have been increasing in the USA and EU27, while imports of conventional bananas remained stable between 2016 and 2020. This growth is also driven by an increasing demand for sustainable production labels, which are in many cases combined with organic certification.

As in the conventional banana market, Central and South America dominate exports of organic bananas. Major suppliers to the European market are Ecuador, Peru, and the Dominican Republic, while Mexico and Colombia dominate the USA market. In recent years, Peru has seen its market share decrease, to the benefit of Ecuador and the Dominican Republic for the European market, and to the benefit of Mexico for the USA. The Dominican Republic specialises in the export of

organic bananas, which accounted for about 75% of the country's banana exports in 2017-2018 (FAO, 2021), and it produces smaller bananas which are convenient to ship as more can be fit into transport boxes. In contrast, bananas from Ghana and Côte d'Ivoire are considered too large by importers, and are more expensive to ship and sell on international markets.

EU27: +12.5%/year since 2018

Imports of organic bananas into the EU grew from 450,000 tonnes in 2018 to 721,000 tonnes in 2021, an annual growth of 12.5% (Figure 30). In the same period, imports of conventional bananas from outside of EU27 grew by 1.1% annually. This resulted in a larger share of organic bananas in total imports, from 8.9% in 2018 to 13.7% in 2021.

Figure 30: Evolution of organic banana (HS 080390, 080310) imports into the EU27, 2018-2021. Source: COLEAD, based on TRACES

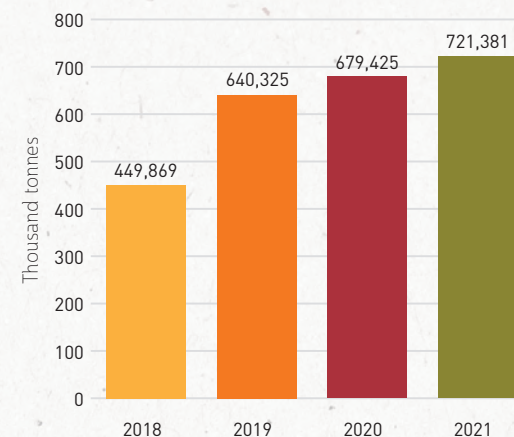


Figure 31: Evolution of organic banana imports into the EU27 by exporting countries, 2018-2021. Source: COLEAD, based on TRACES

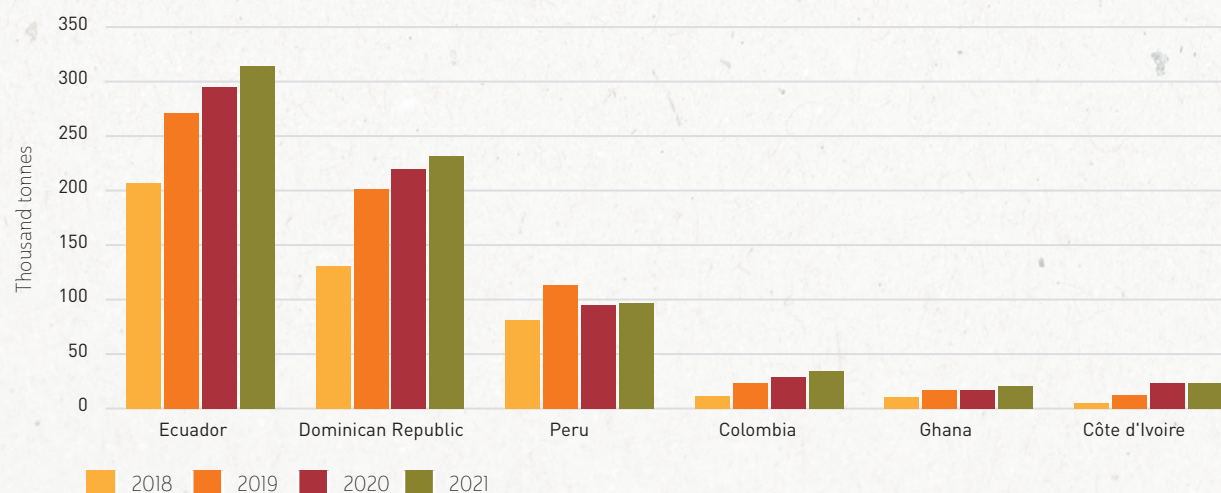
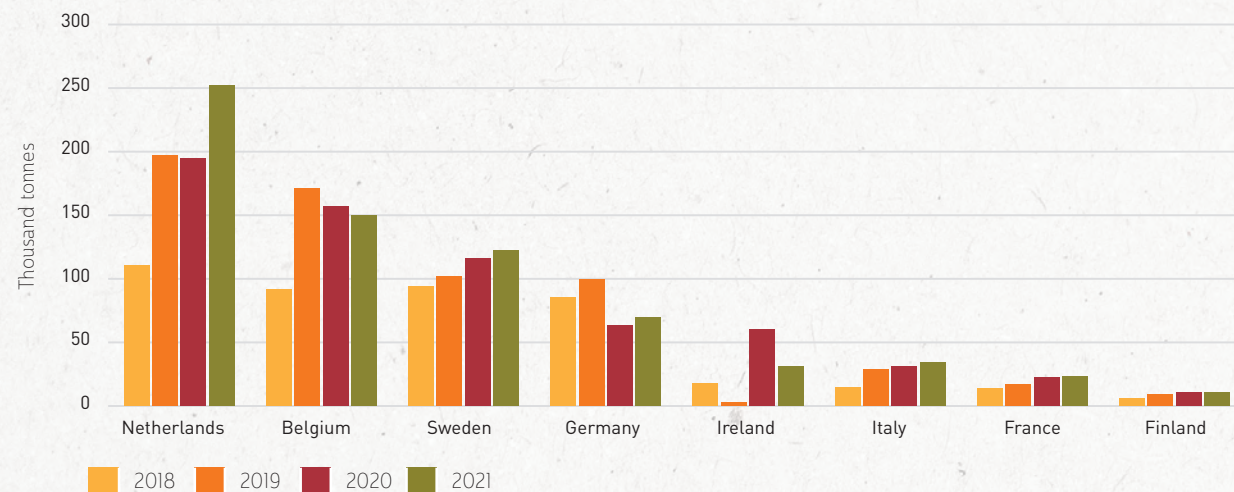


Figure 32: Evolution of organic banana imports into the EU27 by main national market, 2018-2021. Source: COLEAD, based on TRACES



The main suppliers of organic bananas to the EU are Ecuador, the Dominican Republic, and Peru, that together accounted for more than 89% of organic banana imports in 2021 (Figure 31). While the Dominican Republic has the largest organic banana production area, Ecuador is the largest exporter, and both countries saw their exports increase between 2018 and 2021, while exports from Peru declined.

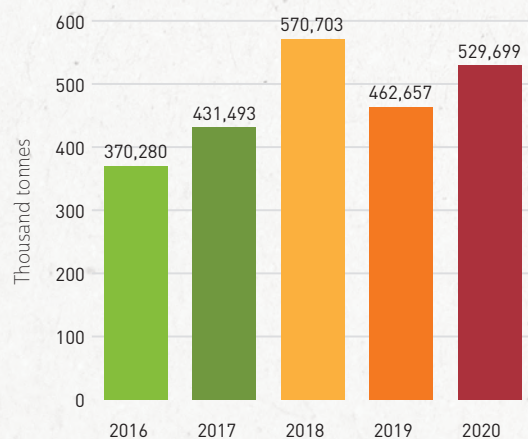
The largest EU national markets are the Netherlands (35% of import volume in 2021) and one of the main trade hubs for bananas in Europe, with a strong focus on importing produce from emerging economies, followed by Belgium (21%) with a smaller domestic consumption but another important trade hub, and Sweden (17%) where demand is growing according to an interview with an EU importer (Figure 32).



USA: +7.4%/year since 2016

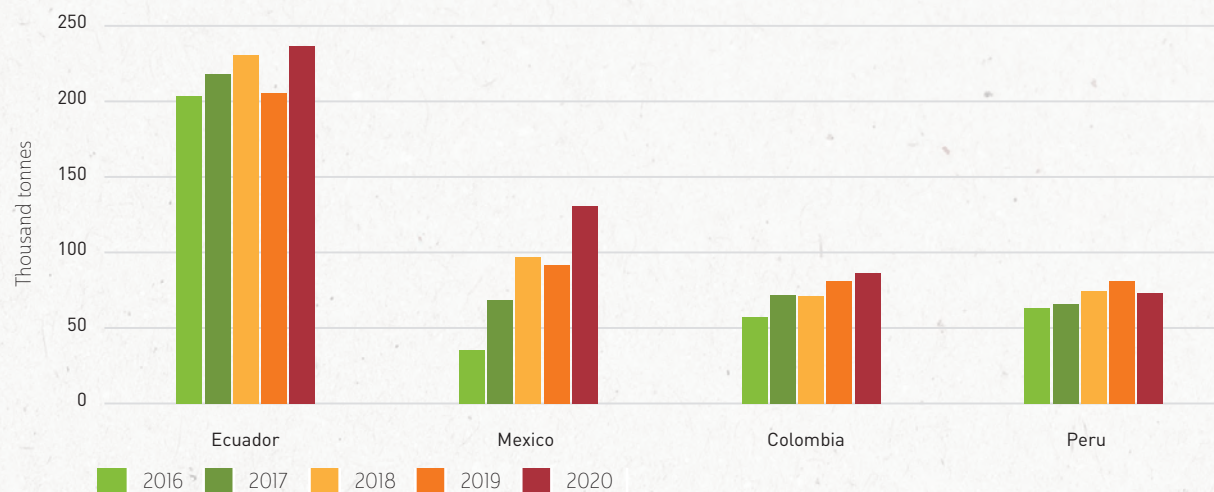
Organic banana imports into the USA were 529,700 tonnes in 2020, after a peak in 2018 at 570,700 tonnes (Figure 33). Imports showed an average annual increase of 7.4% between 2016 and 2020 for organic bananas, but only 0.3% annually for conventional bananas. As a result, the share of organic bananas in total banana imports increased from 8% in 2016 to 11% in 2020.

Figure 33: Evolution of organic banana imports into the USA, 2016-2020. Source: COLEAD, based on UN-Comtrade.



The main supplier of organic bananas to the USA is Ecuador, accounting for 44% in 2020 (Figure 34). The import share from the second largest supplier, Mexico, increased from 9% in 2016 to 24% in 2020. Colombia and Peru complete with the main suppliers. Together, these four countries account for 99% of imports. The Dominican Republic, which is a major supplier of organic bananas to the EU (220,000 tonnes in 2020) only supplied 2,600 tonnes to the USA in the same year.

Figure 34: Evolution of organic banana imports into the USA by exporting country, 2016-2020. Source: COLEAD, based on UN-Comtrade



TIPS FOR EXPORTERS

In this highly competitive market, it is recommended to invest into detailed market research before starting an organic banana business. Find out what qualities, sizes, packaging and labels are needed within the target market, and define good reasons why buyers should change their supply.

5.1.3. Cashew nuts



A growing interest in healthy snacking in Europe and the USA combined with a need for stable and sustainable sourcing, are driving the growing demand for cashew nuts. Sustainability claims and certification are becoming part of the mainstream edible nut market, including for cashew nuts. Nuts are increasingly used as an ingredient in processed foods such as nut spreads and milk.

Viet Nam and India process more than 80% of the world's total cashew production, importing cashew nuts in their shells from other producing countries (<https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/cashew-nuts/market-entry#what-competition-do-you-face-on-the-european-cashew-nut-market>). Viet Nam is the leading supplier of cashew nuts globally while only consuming 5% of its domestic production, whereas India is the second largest producer of cashew nuts but is also the largest consumption market globally. Supplies from African countries of shelled cashew nuts are still very small, but are gaining market share in international trade, especially to Europe. The three largest suppliers of cashew nuts from Africa are Côte d'Ivoire, the largest producer globally of in-shell cashew nuts, followed by Burkina Faso, and Ghana, the seventh largest cashew nut producer globally and that is increasing its exports of cashew nut kernels. Most in-shell cashews are still exported to Viet Nam and India for shelling.

There are many initiatives in Africa to increase processing capacity, thus it is expected that this trend will continue. In February 2022 for example, the United States Agency for International Development (USAID)-funded Trade Hub launched a US\$10.2 million co-investment partnership with

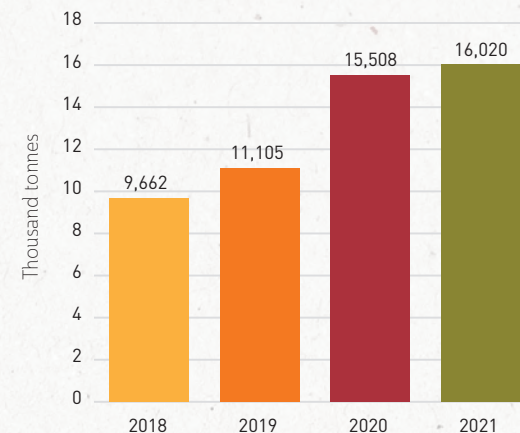
a leading cashew processing company in Benin to strengthen the country's certified organic cashew nut market and to help it meet the growing demand for organic cashew nuts (www.africanfarming.net/crops/agriculture/us-10-2mn-project-to-boost-benin-s-exports-of-organic-cashew-nuts). The processor stated that the current number of organically certified cashew nut producers in the country are not able to meet demand from the USA and Europe.

EU27: +13.5%/year since 2018

Imports of organic cashew nuts into the EU27 grew from about 10,000 tonnes in 2018 to 16,000 tonnes in 2021, an increase of 13.5% annually (Figure 35). EU27 imports of conventional cashew nuts increased at a lower rate of 10.7% annually, reaching 154,000 tonnes in 2021. Organic cashew nuts made up more than 10% of total cashew imports in 2021.

The main suppliers of organic cashew nuts to the EU27 are Viet Nam with 8,300 tonnes (52% of 2021 import volume), 2,200 tonnes from Burkina Faso (14%), and 1,500 tonnes from India (10%). Viet Nam's share is smaller for organic than for conventional and this opens the market for other competitors, namely for ACP countries such as Burkina Faso, and to a lesser extent Côte d'Ivoire and Benin (Figure 36).

Figure 35: Evolution of organic cashew nut (HS 080132) imports into the EU27, 2018-2021. Source: COLEAD, based on TRACES



The largest importing countries for organic cashews in Europe are the Netherlands, Germany and France, that together accounted for 87% of all imports in 2021 (Figure 37). The Netherlands (37%) has the highest per capita consumption of cashew nuts in the world at 2.68 kg (www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/cashew-nuts/market-potential), and is an important trade hub in Europe. For conventional cashew nuts, this country re-exports nearly 70% of the imports, mainly to Germany and France, and this is expected to be similar for organic cashews. Germany (32%) is the second largest importer of organic cashew nuts and the largest importer of conventional cashew nuts in Europe. Several cashew traders are based in Germany and that re-export to France and the UK, as well as to Luxemburg where cashews are processed and packed for the German market. France (18%) is a growing market for organic cashew nuts, and where cashews are an increasingly popular snack, with imports having increased 12% annually from 2018-2021.

TIPS FOR EXPORTERS

For more information on the cashew market in Europe, check CBI's study Exporting cashew nuts to Europe:

<https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/cashew-nuts>

Figure 36: Evolution of organic cashew imports into the EU27 by exporting country, 2018-2021. Source: COLEAD, based on TRACES

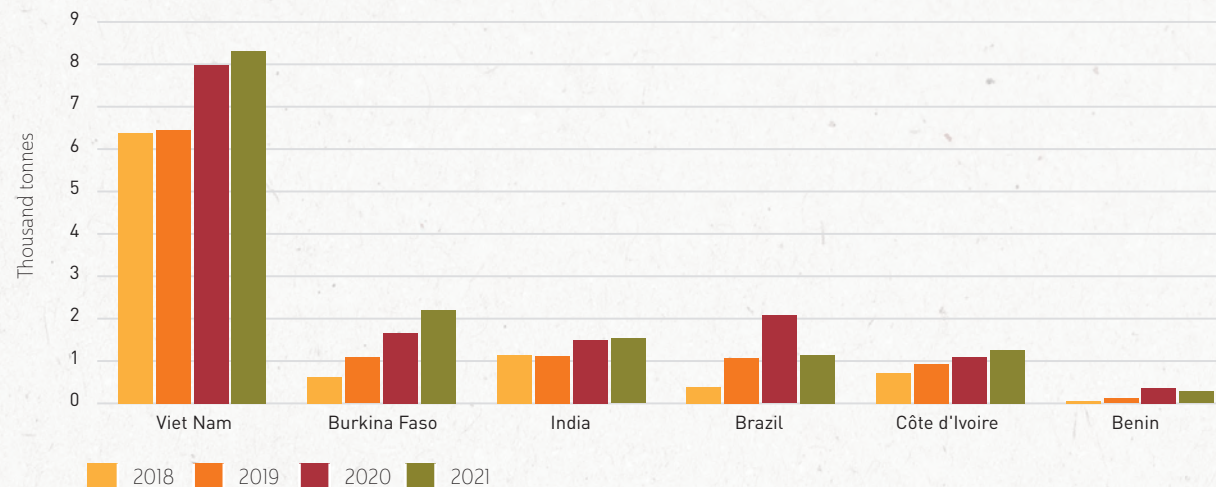
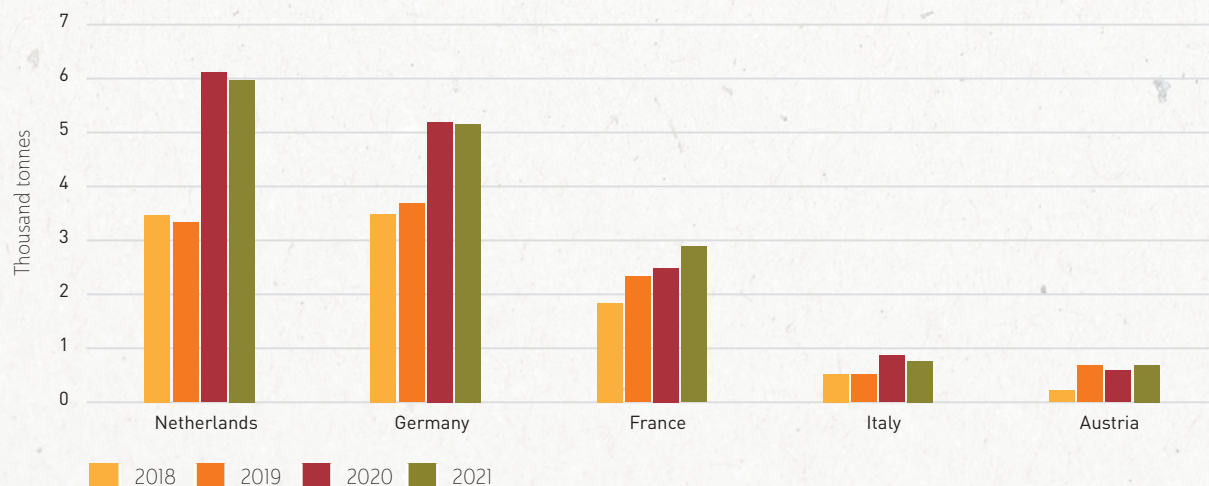


Figure 37: Evolution of organic cashew imports into the EU27 by main national market, 2018-2021. Source: COLEAD, based on TRACES



USA: Accounting for over half of the global organic cashew market

In recent years, total imports of cashew nuts into the USA, conventional and organic, have been stable between 2015 and 2019 at around 152,000 tonnes, increasing slightly in 2020 (average of +2.6% per year). Viet Nam supplied 89% of the USA's total imports of cashew nuts in 2020, followed by Brazil (2.7%) and Côte d'Ivoire (1.2%). There is no available data for separate organic cashew nuts imports into the USA, however, online research reports indicate that the USA accounted for more than half of the global organic cashew nut market in 2020 (www.maximizemarketresearch.com/market-report/global-organic-cashew-nuts-market/99815/#:~:text=Organic%20Cashew%20Nuts%20Market%20size,reaching%20nearly%20US%24%202.44Bn). Moreover, as Viet Nam, Brazil and Côte d'Ivoire are supplying organic cashew nuts to the EU27, it could be assumed that a similar share of total import volume in the USA is also organic.



5.1.4. Coconuts



The main coconut export markets are for processed coconut, while fresh coconuts have only a small and decreasing market. Exports of processed coconut are increasing, in the following forms

- ← **Dried coconut** can be exported as **dried pieces** or processed as **flakes or chips** – dried sliced coconut kernel. These products are used in a wide range of processed food and convenience snack products like chocolate bars, biscuits or added to muesli compositions.
- ← **Coconut meat and dried shavings** are used in the baking industry to add flavour and sweetness without sugar. The export product is desiccated coconut, which is the dried, shredded white meat of the coconut kernel, produced from fresh coconut.
- ← **Coconut milk** is used for cooking as creamy base for many dishes especially in South Asia and Caribbean cuisine. Another important application is the growing smoothie market.
- ← **Coconut water** is very hydrating, contains more potassium than bananas and is therefore sold as a health fitness drink, the market for which is expanding.
- ← **Coconut sugar** has applications in food and the personal care industry. In the food industry, coconut sugar is an attractive vegan alternative to refine cane or beet sugar used mainly for food products in the premium market.
- ← **Coconut flour** is used as a vegan alternative for bakery products.

- ← **Coconut oil** is increasing available as a cooking oil, and is also a key ingredient in the cosmetic industry.
- ← **Non-food uses** include coir (or coprah) made from the outer husk that has a wide variety of uses such for making mats and mattress, and finer 'white coir' from unripe coconut husks for brushes, string and rope. Other coconut products including those made from coconut shells are expanding markets, as is coconut peat made from coir or coconut pith or a mix of the two, and which is increasingly used in the horticulture industry as a peat substitute.

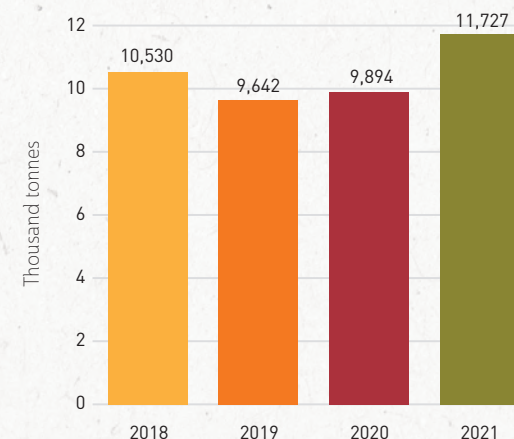
The global organic coconut market is very fragmented, and the degree of fragmentation is likely to accelerate (www.alliedmarketresearch.com/coconut-products-market). The global market is expected to expand at a CAGR of 8.92% until 2026, mainly driven by new product launches, major revenue-generating segments, and market behaviour. Overall, the market for coconut products (conventional and organic) is expected to grow at a CAGR of 13.6%. The increasing market for lactose-free products and the health benefits of organic coconut water and other products, their communication through social media and the expansion of organized retailing offer immense growth opportunities, also for ACP countries. The organic coconut market has the chance to expand if the requested qualities for processing can be offered. However, some alternatives for coconut products are also gaining market, such as cassava

flour, almond and soya milk, nut butters, amongst others.

EU27: +2.7%/year since 2018

Imports of organic coconuts into the EU27 (desiccated coconuts and fresh coconuts combined, with 65% and 35% of imports respectively), have increased slightly from 10,500 tonnes in 2018 to 11,700 tonnes in 2021, an annual increase of 2.7% (Figure 38). However, conventional imports have decreased at a rate of -0.5%, so the organic share increased from 8.9% in 2018 to 10% in 2021.

Figure 38: Evolution of imports of organic coconuts (HS 080111, 080112, 080119) into the EU27, 2018-2021. Source: COLEAD, based on TRACES



Regarding the main suppliers, 86% of the import volume in 2021 came from three countries, with 4,000 tonnes from the Philippines (34%), 3,200 tonnes from Côte d'Ivoire (28%), and 2,800 tonnes from Sri Lanka (24%) (Figure 39). Côte d'Ivoire is however the largest supplier of conventional coconuts, after the Philippines and Indonesia.

The main importers of organic coconuts in 2021 were Germany with 3,700 tonnes ((32%), the Netherlands (25%) and Belgium (23%) (Figure 40). Germany also sources desiccated coconut (conventional and organic) directly from producing countries, with a significant increase of conventional desiccated coconuts from Ghana from only 7 tonnes in 2016 to 170 tonnes in 2020 and became the ninth largest exporter of conventional desiccated coconut in 2021 (CBI, 2021: The European market potential of desiccated coconut).

Figure 39: Evolution of organic coconut (HS 080111, 089112, 080119) imports into the EU27 by exporting country, 2018-2021.
Source: COLEAD, based on TRACES

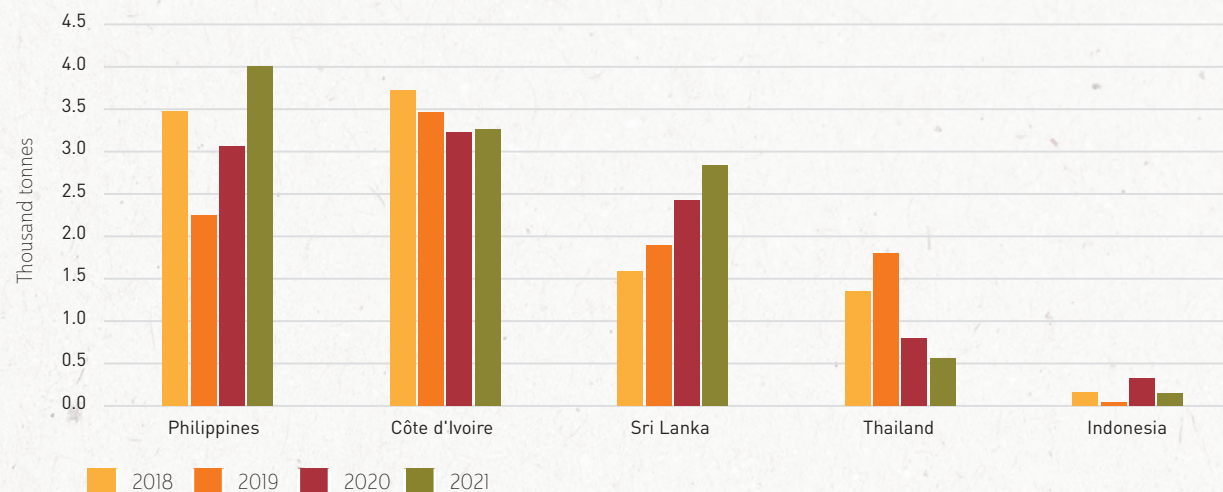
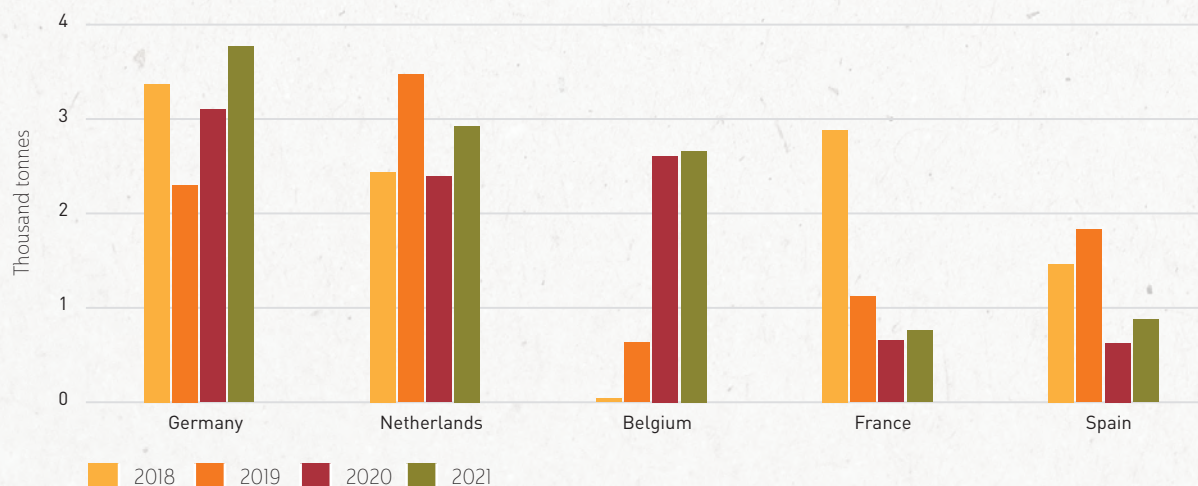


Figure 40: Evolution of organic coconut (HS 080111, 089112, 080119) imports into EU27 by main national market, 2018-2021.
Source: COLEAD, based on TRACES



USA: Slight decrease since 2016, but a growing market for processed coconuts

In recent years, total coconut imports (HS 080111, 080112, 080119), conventional and organic, have been decreasing slightly (-3.6% annually between 2016 and 2020). There is no available data for organic coconut imports into the USA. However, as the Philippines is the main supplier for desiccated coconuts and is the second largest supplier of organic coconuts to the EU27, it can be assumed that a share of exports to the USA are also organic.

The USA and to a lesser extent Canada, are the fastest growing markets for coconut products overall, such as coconut milk, oil, water, etc. This is driven by an increasing demand for lactose-free products, like coconut milk, and for coconut products for use in preparing exotic dishes.

TIPS FOR EXPORTERS

Further market information about desiccated coconut or coconut water -

<https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/desiccated-coconuts/market-potential>

<https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/coconut-water/market-potential>

To register with the coconut community; trade directories, webinars, up to date information - <https://coconutcommunity.org/>

Understanding the coconut supply chain - Webinar by Earthworm Foundation - <https://www.youtube.com/watch?v=memx0EInayo&t=2897s>

Evolution of ranking of coconut producing countries between 1960 until 2020 is available with <https://www.youtube.com/watch?v=Ly4rwh7oivo>



5.1.5. Mangoes



In international trade data, mangoes, guavas and mangosteens are covered by one product category (HS 080450). As many countries specify individual products in their trade data, it can be inferred that mangoes comprise the bulk of trade in the category of mangoes, guavas and mangosteens. Exporters of mangosteen are mainly concentrated in Southeast Asia, such as Thailand, Hong Kong and Indonesia, and guavas take up a very small share of trade in this product category.

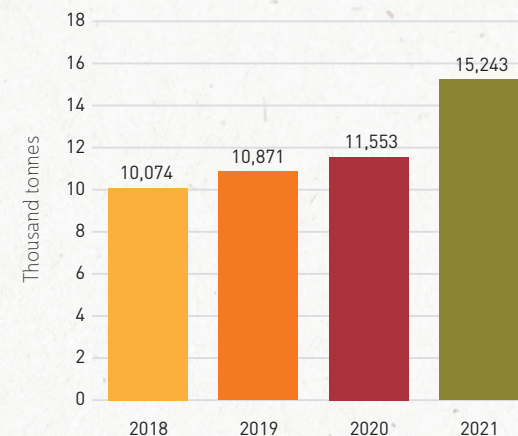
The mango market is very dynamic, with fluctuations in supply volumes. As consumption is strongly supply driven and influenced by factors such as price, available volumes, quality, and competition from other fruit, it is difficult to predict future sales. In the long term, a growth in demand is expected as tropical fruit grow in popularity. It also fits with the growing interest in healthy foods and exotic flavours, with new mango products on the market (such as dried organic mangoes as a snack), and convenient mango products such as tree-ripened, ready-to-eat and freshly cut mangoes.

The global imports of mangoes into the EU has been growing steadily in the past four years, which shows a certain maturity of the market. It can be assumed that the organic market for mangoes will follow a similar trajectory. In terms of varieties, the European market demands mangoes with little fibre, with preference for Kent and Keitt varieties, followed by Palmer. The Tommy variety is fibrous, hence there is a declining interest in the EU, while in the USA this variety is the most demanded.

EU27: + 11%/year since 2018

Organically certified mangoes is a small but growing niche market, mostly traded by specialised organic fruit importers. Imports into the EU increased by 11% annually between 2018 and 2021, from 10,000 tonnes to 15,200 tonnes (Figure 41). Total European imports of mango, guava and mangosteen were 408,000 tonnes in 2021, growing at an annual rate of 4.7%, and the share of organic mangoes in total imports grew to 3.7% in 2021 from 2.9% in 2018.

Figure 41: Evolution of imports of organic mango, guava and mangosteen (HS 080450) into the EU27, 2018-2021.
Source: COLEAD, based on TRACES



The main suppliers to the EU are Peru and Burkina Faso that together accounted for more than 65% of organic mango, guava and mangosteen imports in 2021 (Figure 42). These imports mainly cover organic mangoes. Senegal, Côte d'Ivoire and Ecuador completed the top five suppliers. Exports from the two main suppliers increased between 2018 and 2021, but decreased for Senegal, as well as other ACP suppliers such as Cameroon and Mali. These two countries exported around 200 tonnes to the EU27 in 2018, but less than 50 tonnes in 2021.

The largest EU national market for organic mangoes, guavas and mangosteens (Figure 43): is the Netherlands (54% of imports in 2021), a medium-large market for mangoes but also a key trade hub, that re-exports to other European countries, such as Germany and France. Germany (16%) is the largest consumption market for mangoes in Europe, with growing consumer interest in organic mangoes. Spain (12%) is one of the fastest growing importers of mangoes and is developing into a trade hub. Belgium (11%) imports more organic mangoes than conventional mangoes

TIPS FOR EXPORTERS

For more information on the mango market in Europe, check CBI's study *Exporting mangoes to Europe*: <https://www.cbi.eu/market-information/fresh-fruit-vegetables/mangoes-0>

For more information on the exotic tropical fruit market in Europe, check CBI's study *Exporting fresh exotic tropical fruit to Europe*: <https://www.cbi.eu/market-information/fresh-fruit-vegetables/exotic-tropical-fruit-0>

Figure 42: Evolution of organic mango, guava and mangosteen imports into the EU27 by exporting country, 2018-2021. Source: COLEAD, based on TRACES

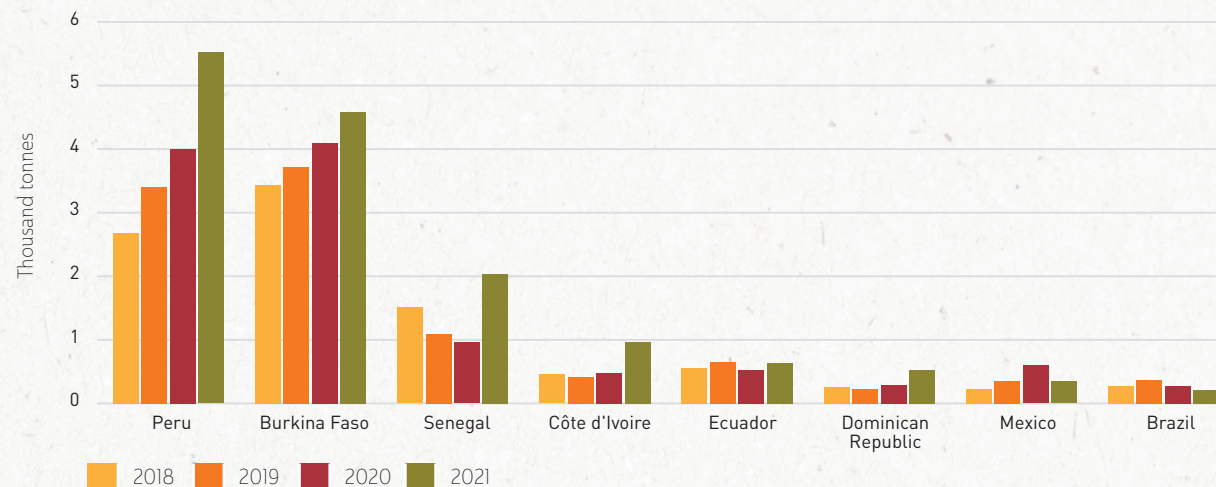
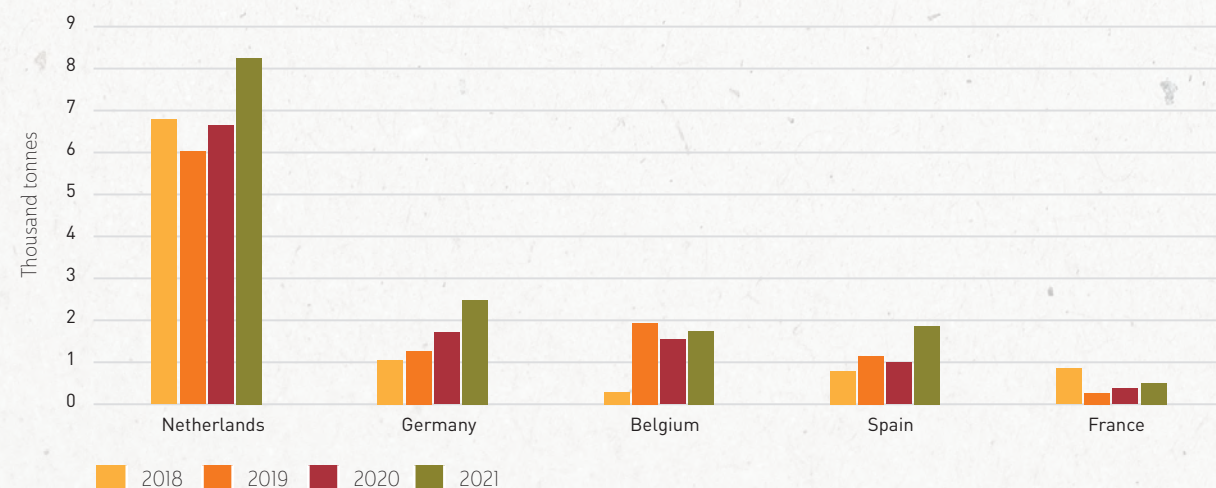


Figure 43: Evolution of organic mango, guava and mangosteen imports into EU27 by main national market, 2018-2021. Source: COLEAD, based on TRACES



USA: +13%/year since 2016

Organic mango imports by the USA were 36,000 tonnes in 2020, with an annual growth of 13% since 2016 when 19,500 tonnes were imported (Figure 44). To compare, imports of conventional mangoes increased by only 4.3% annually in the same period. As a result, the market share of organic mangoes increased from 4.2% to 6.2% between 2016 and 2020.

The main supplier of organic mangoes to the USA is Mexico, which accounted for 76% of imports in 2020 (27,000 tonnes) and dominates the US market both for conventional and organic mangoes

(<https://www.producepay.com/current-situation-of-the-fresh-mango-market-in-the-united-states/>).

Next are Peru (14%) with 4,800 tonnes, and Ecuador (6%) with 2,000 tonnes (Figure 45). Exports from Mexico show the greatest growth (+156% between 2016 and 2020) and this include most of the increase in exports of organic mangoes to the USA.

Figure 44: Evolution of organic mango imports into the USA, 2016-2020. Source: COLEAD, based on UN-Comtrade.

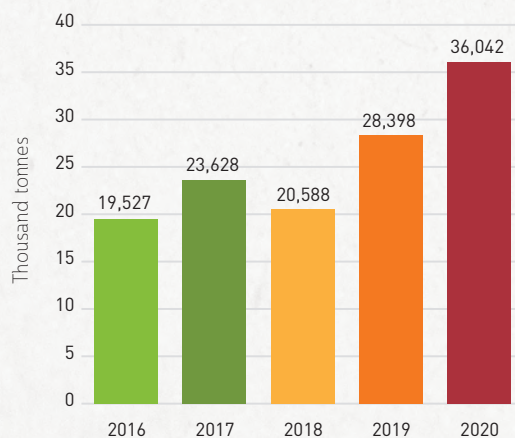
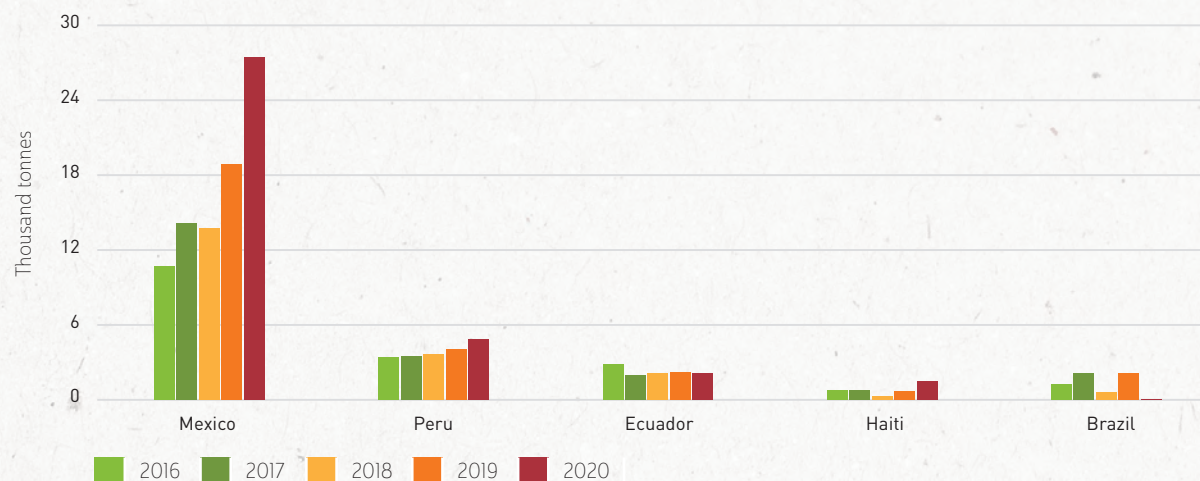


Figure 45: Evolution of organic mango imports into the USA by exporting country, 2016-2020. Source: COLEAD, based on UN-Comtrade



5.1.6. Pineapples



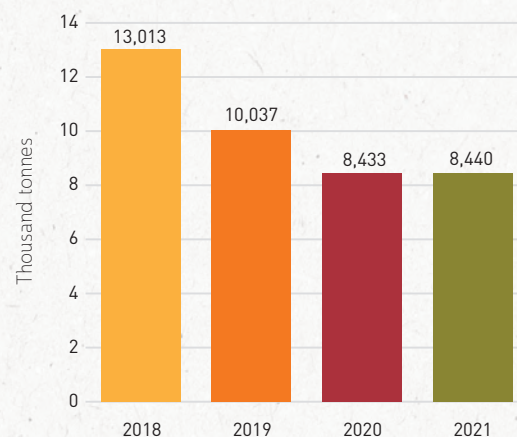
Pineapples are the second most traded tropical fruit, after bananas. Trade was strongly impacted by the COVID-19 pandemic, mainly because of closures in hospitality sectors that are significant channels for this fruit (OECD/FAO, 2021). Global exports of pineapples are expected to pick up again, likely driven by the USA. The Agricultural Outlook 2021-2030 report projects that Europe will remain the second largest importers of pineapples after the USA. Growing demand is expected to come from low unit prices and the introduction of premium novelty varieties.

Costa Rica is the global leader in pineapple supply, both organic and conventional, to the North American and European markets. However, the share of Costa Rican organic pineapple imports in Europe fell from 59% in 2018 to 41% in 2020, alongside an increase in the share from African countries such as Côte d'Ivoire (from 18% in 2018 to 37% in 2020) and Benin. In the future, in a context of concerns on the carbon footprint of international trade, West Africa should become more attractive to EU consumers and importers than Central America.

EU27: -10.3%/year since 2018

Organic pineapple imports into the EU27 decreased by 10.3% annually between 2018 and 2021, from 13,000 tonnes to 8,400 tonnes (Figure 46). This was a stronger decrease than for total pineapple imports (conventional and organic combined) that decreased 1.3% annually during the same period. In 2021, only 1% of total pineapple imports were certified organic, compared to 1.5% in 2018. In Europe, MD2 is the main pineapple variety, although there are opportunities for other sweet varieties, such as ripe, air-freighted Sweet Cayenne that have a superior taste.

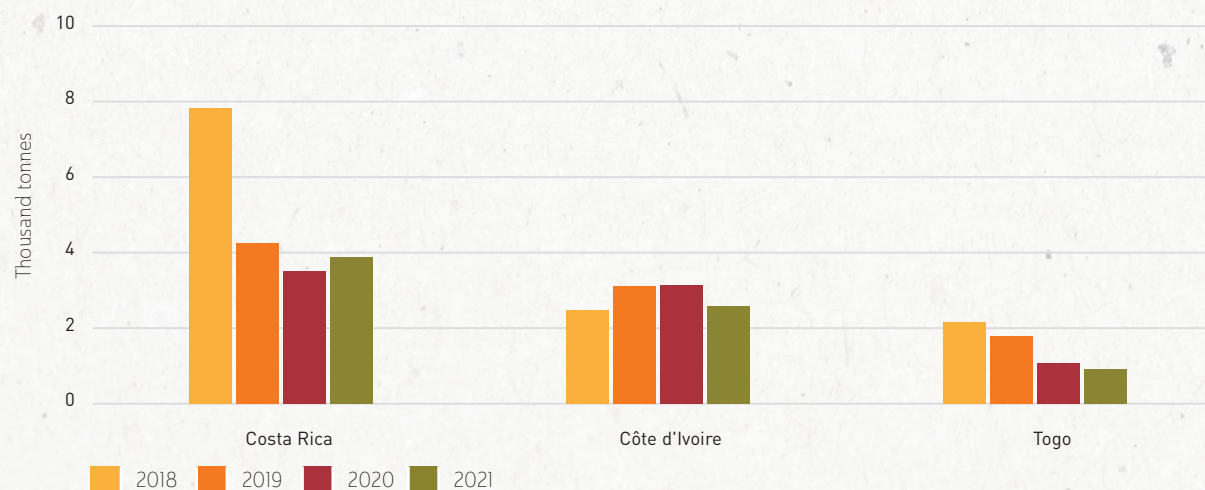
Figure 46: Evolution of organic pineapple (HS 080430) imports into the EU27, 2018-2021. Source: COLEAD, based on TRACES



The main suppliers of organic pineapples are Costa Rica (accounting for 45% of import volume in 2021), Côte d'Ivoire (30%) and Togo (11%), that together accounted for 87% of organic pineapple imports in 2021 (Figure 47). The decline in organic pineapple imports corresponds to the decline in EU imports from Costa Rica (-16% annually).

Compared to total pineapple imports into the EU27, including conventional, where Costa Rica has a market share of about 90%, the organic pineapple market is more open to ACP countries from Africa. Supplies of organic pineapple from ACP countries only declined by 4% annually, while total imports of organic pineapple decreased by an average of 10% per year. In terms of ACP country suppliers, Côte d'Ivoire and Togo are the top two suppliers to EU27 (Figure 48), while the others exported a maximum

Figure 47: Evolution of organic pineapple imports into the EU27 by the top three exporting countries, 2018-2021. Source: COLEAD, based on TRACES



250 tonnes to the EU27 in 2021. Except for the Dominican Republic, the third main supplier in 2021, all the top 10 ACP suppliers are in Africa.

The largest EU national market for organic pineapples (Figure 49) is the Netherlands (56% of import volume in 2021) and which is a major trade hub for pineapples. It is the main arrival port for banana carriers, that also carry pineapples. Dutch imports of organic pineapples decreased at a similar rate as total EU imports, by an average rate of -6.7% annually. France (26%) is one of the main consumption markets for pineapples, with stable imports in recent years. Germany (9%), a large consumption market for pineapples is also a strong market for organic foods. German imports of organic pineapples experienced an annual growth rate of 9% from 2018 to 2021.



Figure 48: Evolution of organic pineapple imports into the EU27 by the top six ACP exporting countries, 2018-2021. Source: COLEAD, based on TRACES

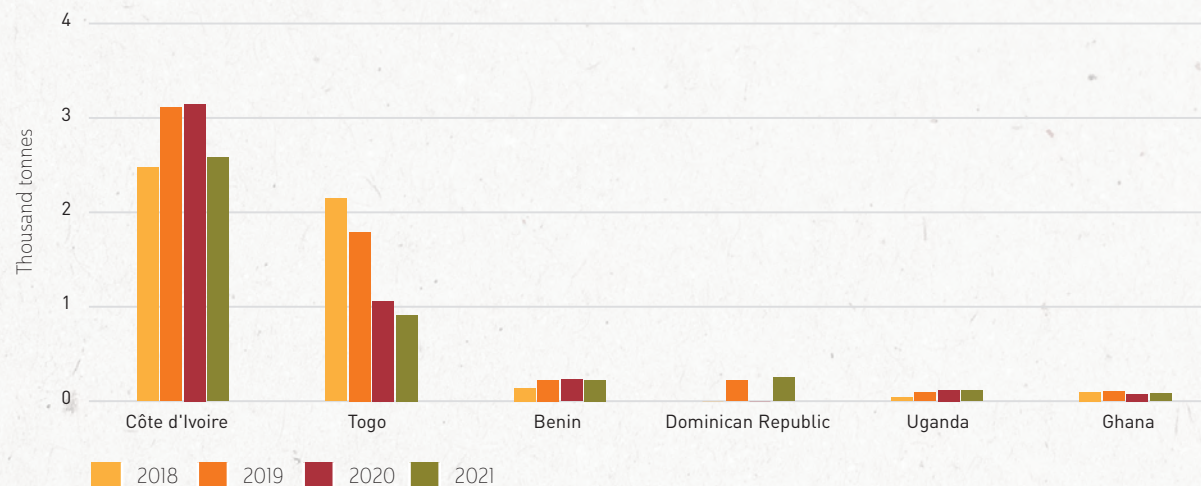
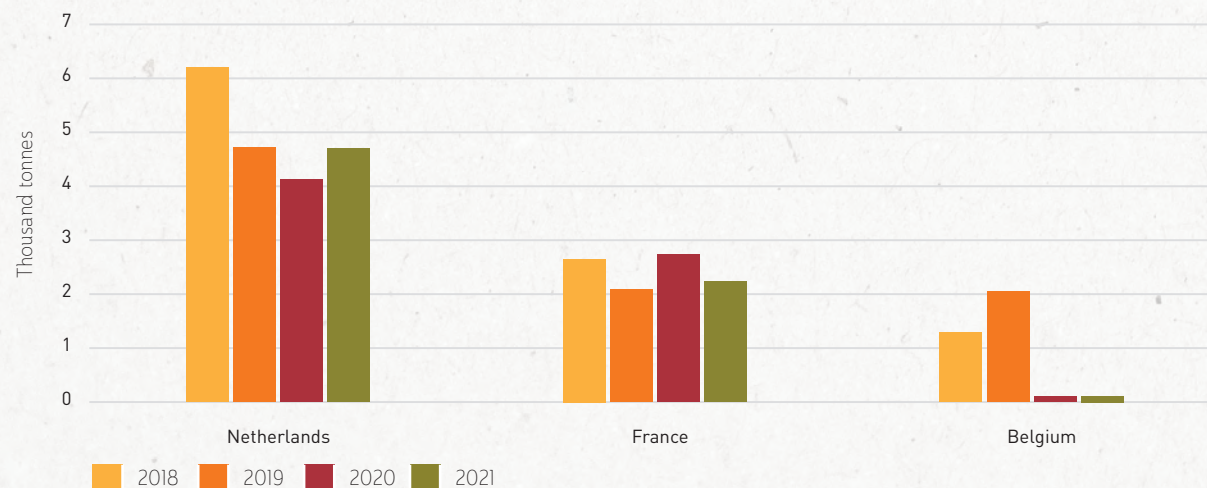


Figure 49: Evolution of organic pineapple imports into EU27 by main national market, 2018-2021. Source: COLEAD, based on TRACES



USA: A more stable market

Compared to Europe, pineapple imports into the USA (conventional and organic combined) have been more stable in recent years. Between 2018 and 2020, imports decreased by 5.6%, while European imports decreased by 13.5% in the same period. There is no available data for organic pineapples, but it can be considered that imports are significant, given that the pineapple imports (organic and conventional combined) was well over 1,000,000 tonnes per year since 2014, compared to 773,000 tonnes for the EU27 in 2020.

Costa Rica was the main supplier of organic pineapples (organic and conventional combined) to the USA in 2020 (86%) and is also the main supplier of organic pineapples to Europe. Mexico is the second largest supplier of organic pineapples to the USA (<https://www.freshplaza.com/article/9074015/organic-pineapple-market-is-a-delicate-balance/>).

According to an interview with a key organic pineapple supplier to the USA, the organic pineapple market in the USA struggled at first, as they were more expensive to produce, and were mainly available in smaller sizes than customers were used to. The main pineapple varieties are Golden Pineapple and Hawaii Gold Pineapple (<https://www.producemarketguide.com/produce/pineapple>).



5.2. Organic vegetables and spices

Given the trends in global markets for healthier and plant-based food the following products will be highlighted within this section.

- ← **Ginger** as a key spice product, also classified as 'superfood' and used in growing number of food combinations (spices, teas, juices, spreads, sauces), in Asian dishes, and also as a key spice to avoid infections.
- ← **Pulses** as consumption increases with expansion of the vegan and vegetarian markets.
- ← **Onions** as a 'healthy' ingredient and important in healthy convenience food products.
- ← **Tomatoes** as they are used in a growing number of food preparations
- ← **Sweet potatoes** that have a growing market as consumers change from 'regular' potato varieties.

5.2.1. Ginger



The import of ginger, both conventional and organic, is increasing in Europe and the USA. Ginger is used as spice, for tea preparation or as an ingredient for a large number of prepared foods, spreads, snacks, and also in beverages such as soft drinks or smoothies. It is increasing mainly because it is seen as healthy ingredient and markets are expected to grow within the next three to five years. During the COVID-19 pandemic, consumers increasingly integrated healthy food into their diet and used ginger as health supplement. Ginger is also used within the cosmetic sector, and the company Origin for example recently launched a series with ginger as a main ingredient (www.origins.de/ginger).

EU27: 33% of imported ginger is organic

Ginger is the most imported spice in organic form in the EU27, with imports having grown from 20,200 tonnes in 2018 to 38,500 tonnes in 2021 (Figure 50), increasing by 17% annually. In 2021, organic ginger represented 33.4% of total ginger imports (organic and conventional combined), which is a very high share compared to other products studies in this report, and this increased every year since 2018.

The main suppliers of organic ginger are China and Peru, that together accounted for more 96% of imports into the EU27 in 2021 (Figure 51). The remaining 4% of imports are from Brazil, India, Costa Rica, Viet Nam and Madagascar, of between 95 and 850 tonnes in 2020. This shows that organic ginger is becoming more significant for producers in ACP countries for export to Europe, particularly in Africa.

Figure 50: Evolution of organic ginger imports (HS 091011) into the EU27, 2018-2021. Source: COLEAD, based on TRACES

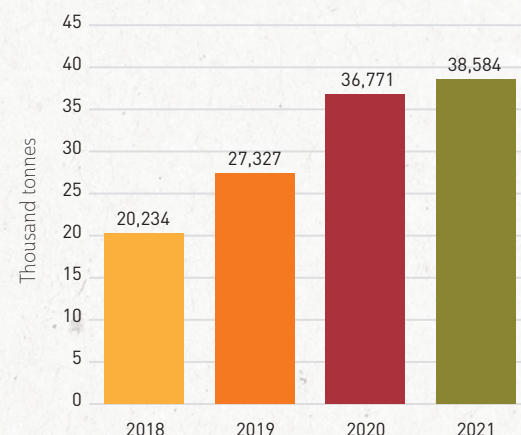


Figure 51: Evolution of organic ginger imports into the EU27 by the top exporting countries, 2018-2021. Source: COLEAD, based on TRACES

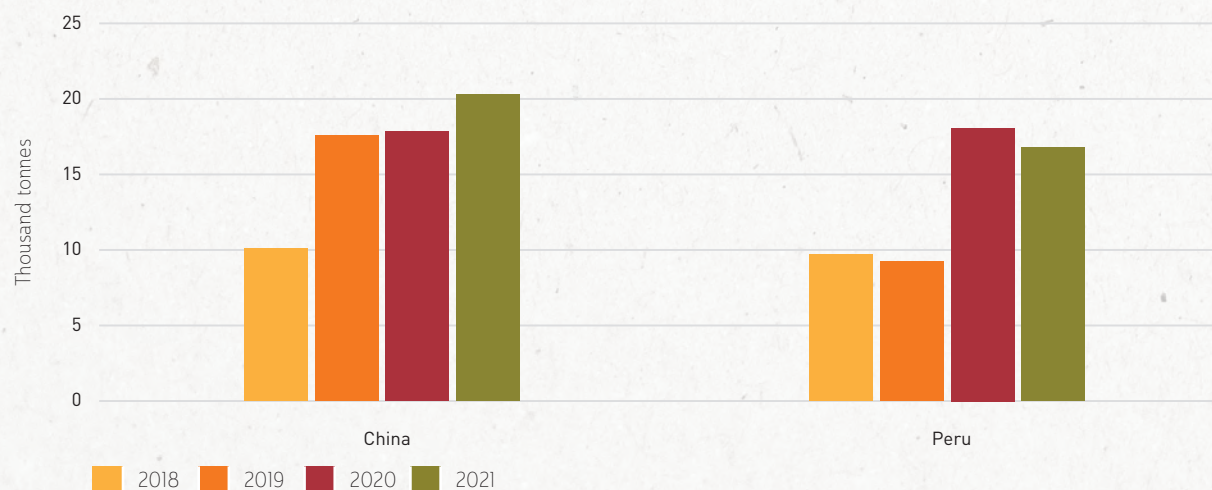
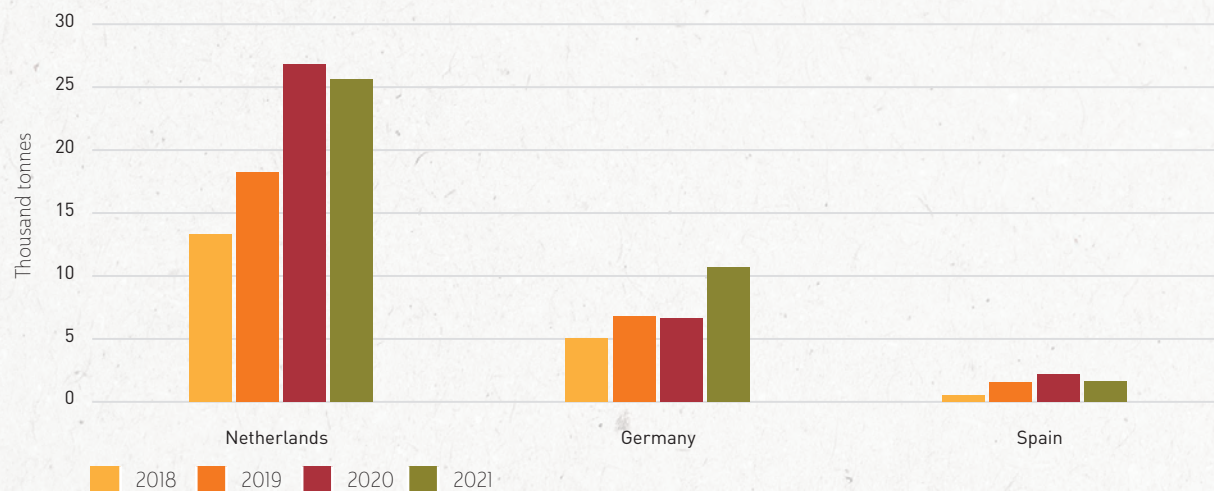


Figure 52: Evolution of organic ginger imports into the EU27 by main national market, 2018-2021. Source: COLEAD, based on TRACES



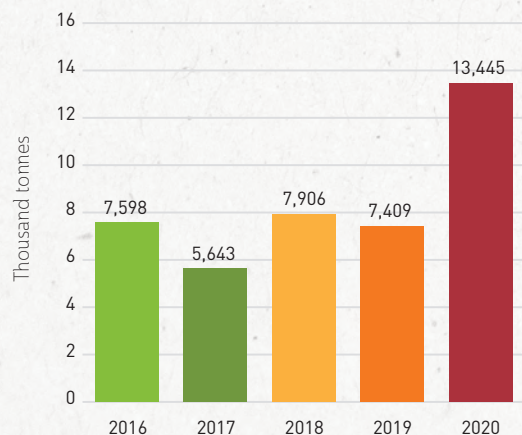
The largest European import markets for organic ginger are the Netherlands (66% of imports in 2021), Germany (28%) and Spain (4%) (Figure 52). Three quarters of the total import volumes of ginger coming into the Netherlands is exported again, mainly to Germany, Poland, France and Belgium.



USA: +12%/year since 2016

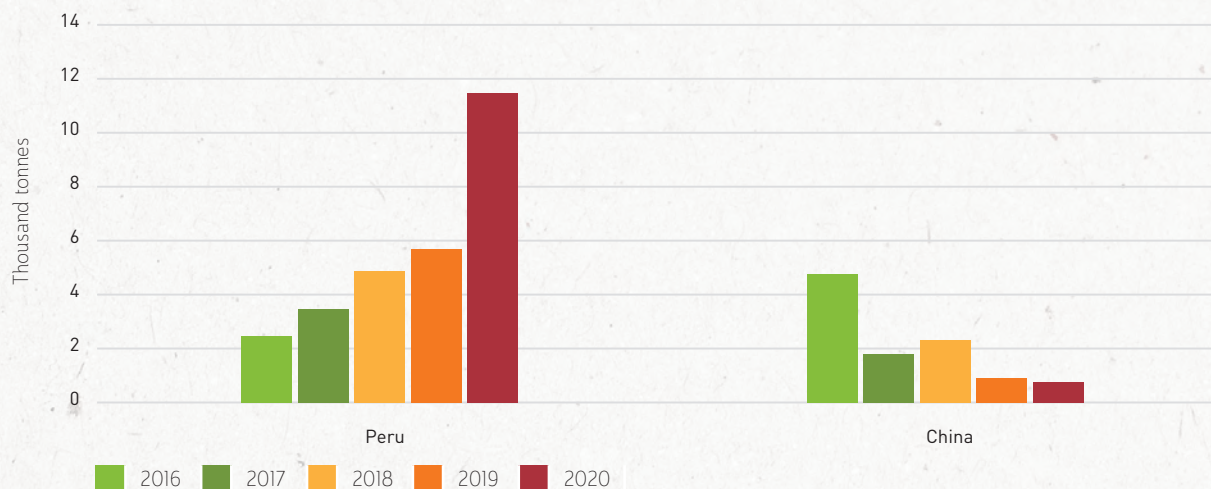
Organic ginger exports to the USA were 13,400 tonnes in 2020, up from 7,600 tonnes in 2016 (Figure 53). The +12% annual growth is not as high as in the EU27, however, the share of organic ginger compared to total imports increased from 10% in 2016 to 13% in 2020, as organic imports of ginger have grown faster than conventional.

Figure 53: Evolution of total organic ginger imports into the USA, 2016-2020. Source: COLEAD, based on UN-Comtrade.



Similar to EU27, Peru and China are the main suppliers of organic ginger to the USA, though imports from China are decreasing in favour of Peru. In 2016, Peru accounted for only 32% of imports (2,400 tonnes) and China 62% (4,700 tonnes), but this more than reversed over the past five years. In 2020, Peru accounted for 85% of imports (11,400 tonnes) while China for 5% (775 tonnes) (Figure 54). India and Nigeria completed the imports in 2020.

Figure 54: Evolution of organic ginger imports into the USA by exporting country, 2016-2020. Source: COLEAD, based on UN-Comtrade



TIPS FOR EXPORTER

Market information for exporting dried ginger:

<https://www.cbi.eu/market-information/spices-herbs/dried-ginger-0>

Trends on the European spices and herbs market:

<https://www.cbi.eu/market-information/spices-herbs/trends>

5.2.2. Onions



Organic onions are important ingredients for many ready-to-eat products like soups, sauces and convenience food products. There are fluctuations in imports into the EU27, both as organic and for total imports, with a peak in 2019. Egypt supplies almost all imports of organic onions into the EU27, whereas for conventional imports, China, Egypt and New Zealand are the main suppliers. For the USA, most imports come from Mexico, Peru and Canada.

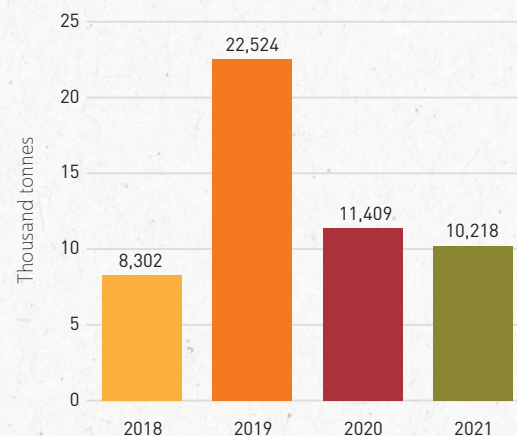
EU27: 99% of organic onions come from Egypt

In 2021, the EU27 imported 10,200 tonnes of organic onions, with an annual increase of 5.3% since 2018 (Figure 55). Organic imports increased in a similar pace as total imports, with the share of organic onions 3.48% after higher slightly share in 2019 and 2020.

Almost all organic onions come from Egypt (99%), which leaves little room for competitors. However, the conventional onion market is more fragmented, which mean that a growing organic onion sector might open room for other suppliers.

The main importing countries are the Netherlands, Italy and Slovenia that account for 97% of total imports in the EU27 in 2021. A key trader in the Netherlands also sources organic onions from Spain, Turkey and China.

Figure 55: Evolution of organic onion (HS 070310) imports into the EU27, 2018-2021. Source: COLEAD, based on TRACES



TIPS FOR EXPORTER

Detailed global and up to date information about this market is available from the OEC - <https://oec.world/en/profile/hs/onions?redirect=true>

USA: a stable conventional market

There is no available data for organic onion imports into the USA. The conventional market was quite stable between 2016 and 2020, between 520,000 tonnes and 570,000 tonnes, with an overall annual increase of 1.5%. The main suppliers are Mexico, Peru and Canada, and as these are different than for organic onions in the EU27, it is difficult to conclude any similarities in the share of organic versus total onion imports.



5.2.3. Pulses



The category of pulses contains several commodities, such as a range of different beans, chickpeas, lentils and peas. In this section, peas (HS 071310 and HS 070810), kidney beans (HS 071333) and chickpeas (HS 071320) are considered in more details.

The main producer countries are in Europe and Asia, and that are also large consumption markets, but this product group shows promising opportunities for ACP countries. Russia and Ukraine are both major producers and exporters of pulses to the rest of the world, and this trade is currently affected by the Russia's invasion of Ukraine. In addition, changing consumer habits and growing trends like vegetarianism also influence this supply chain. An increasing number of vegan and allergic consumers as well as further consumption trends (see Section 4.5.2) are also contributing to the growth of this market, particularly as a substitute for animal protein, convenience products and others.

Within the past four years, the European market for pulses (conventional and organic) expanded by 27% in value. The growing human consumption of pulses of 3.9% per year is expected to continue until 2030 (CBI, 2022), and the EU market is expected to grow due to increasing demand for food and livestock feed.

An increasing number of innovative products also use processed pulses, such as in sustainable packaging that replace plastic chips to protect the contents of a box.

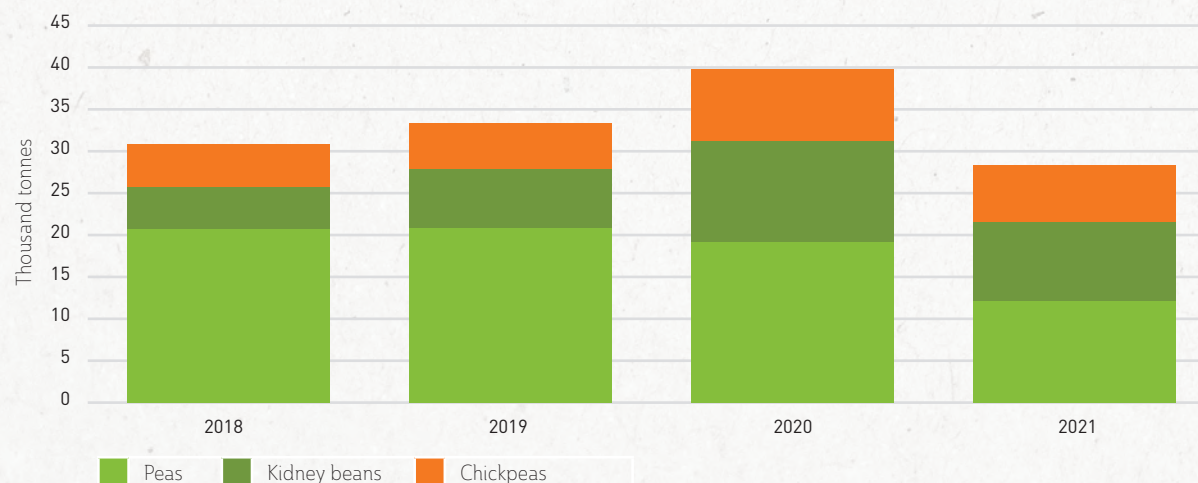
EU27: Imports of kidney beans and chickpeas grow faster than peas

Peas, kidney beans and chickpeas are considered in data for pulses regarding organic EU27 imports. Peas are the main imported crop, followed by kidney beans and chickpeas (Figure 56). Organic imports decreased between 2018 and 2021, mainly due a fall in 2021 whereas there were increases in previous years. Imports of peas decreased by 12% annually, and the share compared to conventional import remained stable (2.4% in 2018 and 2.3% in 2021). Imports of kidney beans increased greatly, from less than 5,000 tonnes in 2018 to more than 9,000 tonnes in 2021, with a peak of 12,000 tonnes in 2020 representing an increase of 17.6% annually that indicating that vegetarianism is having an impact as

an animal protein substitute. The share of organic kidney beans increased from 1.5%, to 2.7% in 2021. Chickpea imports have also increased by 7% annually, illustrating a similar trend as for kidney beans, also with an increasing share of organic chickpeas compared to conventional imports, reaching 6% in 2021.

The main suppliers for organic peas are Russia, Ukraine and Moldova, but this may change following the start of Russia's invasion. Turkey and the United Arab Emirates each accounted for a quarter of exports to the EU27 in 2018, but dropping to almost zero in 2021 and could take the opportunity to increase exports. The main importing countries are the Netherlands (74% of imports in 2021), Lithuania (7%) and Poland (4%).

Figure 56: Evolution of imports of organic pulses (peas, kidney beans and chickpeas) into the EU27, 2018-2021.
Source: COLEAD, based on TRACES



Concerning kidney beans, 80% of imports in 2021 came from China, followed by Turkey (14%) and Argentina (4%). The main importing countries were Italy (57%), the Netherlands (17%) and Germany (13%).

Turkey supplied most organic chickpeas to the EU27 in 2021 (85%), followed by Ukraine (6%) and Mexico (4.6%). Similar to the supply of peas, this might change in due to the current conflict. Germany, the Netherlands and Italy are the main markets, together representing more than 80% of all imports.

USA: A decreasing markets for peas and kidney beans but stable chickpeas imports

No data is collected for organic pulses imported into the USA. It is also difficult to estimate organic imports into the USA based on conventional imports and trends in the EU27, as they are quite different.

The import of conventional peas and kidney beans to the USA decreased from 2016 to 2020, even if this trade is quite dynamic. Conventional chickpea imports have been stable, slightly increasing of 0.4% annually between 2016 and 2020. The main supplier to the USA is Canada, accounting for 50–90% of imports depending on the commodity. As for other suppliers, the second largest is India for peas, Nicaragua for kidney beans, and Mexico for chickpeas.

As these suppliers are different from those to the EU27, which are Russia, Ukraine, China and Turkey, it is difficult to estimate the share of organic imports to the USA.

TIPS FOR EXPORTERS

For further market information on demand for pulses in the European market – CBI
<https://www.cbi.eu/market-information/grains-pulses-oilseeds/trade-statistics>



5.2.4. Tomatoes



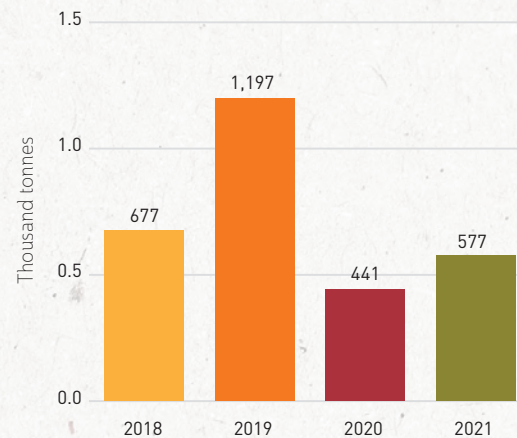
Worldwide, the main importers of fresh and chilled tomatoes (conventional and organic) are the USA, Germany, France, UK and Russia. The largest exporters of tomatoes (conventional and organic) are Morocco (to the EU27) and Mexico (to the USA). There is high and year-round demand for fresh tomatoes by European and North American consumers, and though both conventional and organic tomatoes are produced in those two markets, there is room for suppliers mainly to meet out of season demand.

For ACP countries, many challenges especially with post-harvest losses need to be overcome before they are able to export fresh produce in bulk to Europe or the USA. If producers of organic tomatoes can fulfil international requirements, most potential seems to be within added value products, such as dried tomatoes, or processed tomatoes in sauces with local spices. There are also opportunities for Senegal in particular for cherry tomatoes.

EU27: a marginal import market

As the EU27 is a large tomato producer, imports are more marginal than for other fruit and vegetables. However, there is demand for out of season fresh produce. Imports of organic tomatoes into the EU27 have varied, peaking at 1,200 tonnes in 2019, but were only 577 tonnes in 2021 (Figure 57). This was mainly caused by the start of the COVID-19 pandemic that disrupted supply chains, raised freight costs and reduced capacities. The share of imported organic tomatoes to total imports decreased, and is the smallest of all studied products at less than 0.2% between 2018 and 2021.

Figure 57: Evolution of imports of organic tomatoes (HS 070200), into the EU27, 2018-2021. Source: COLEAD, based on TRACES



The largest supplier of organic fresh tomatoes from outside the EU27 are Senegal, followed by Morocco and Israel, that together account for almost all of the imports, that totalled 427 tonnes in 2020 (Figure 58). Senegal is only the fifth main supplier of conventional tomatoes, thus its share of organic tomatoes is higher than for other countries, with an exceptional peak in 2019.

Figure 58: Evolution of organic tomato imports into the EU27 by the three top exporting countries, 2018-2021. Source: COLEAD, based on TRACES

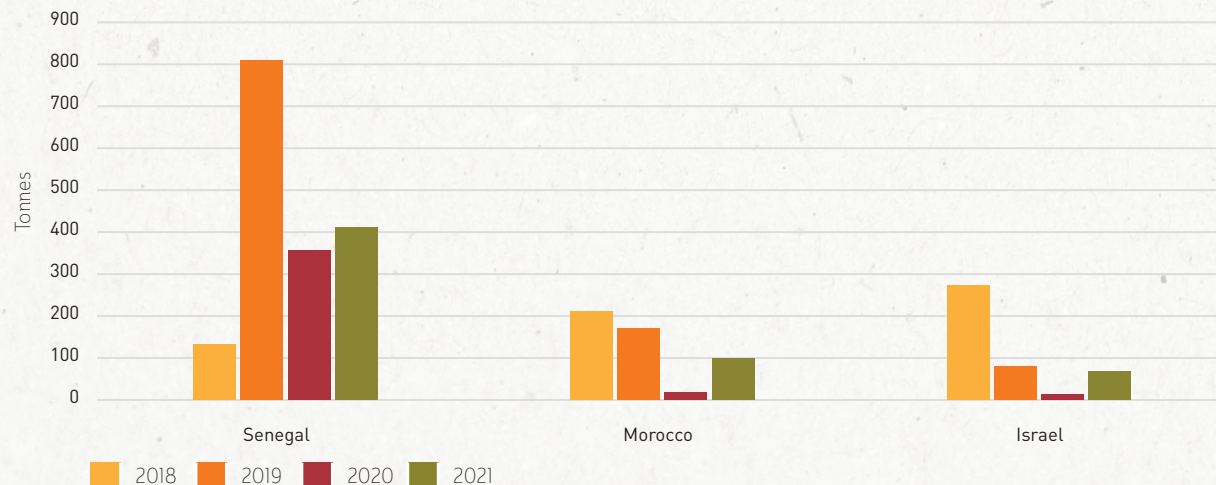
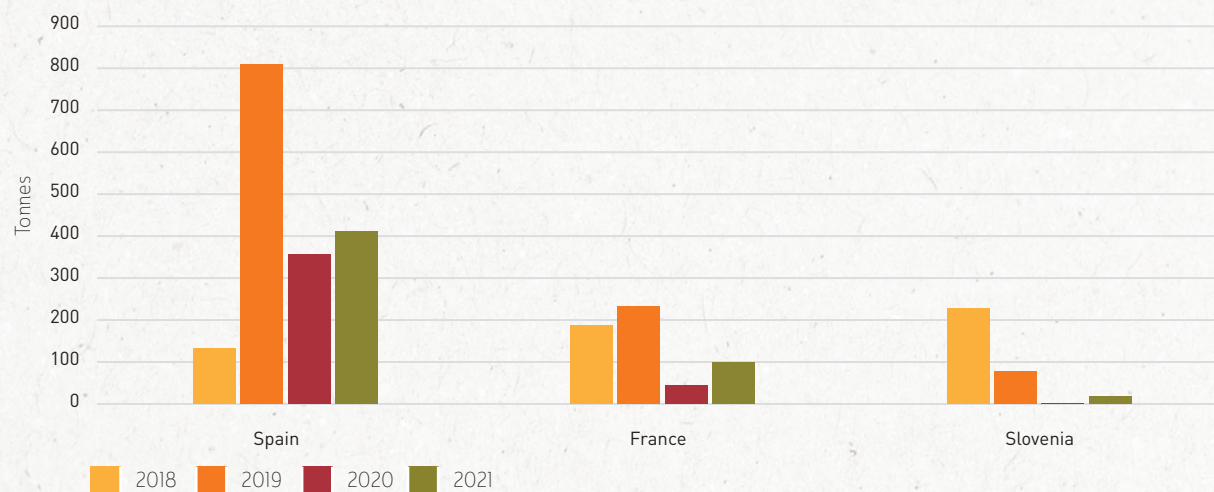


Figure 59: Evolution of organic tomato imports into the EU27 by main national market, 2018-2021. Source: COLEAD, based on TRACES



Spain is the main producing country within Europe for both organic and conventional tomatoes, but it is also the leading import country for organic tomatoes, followed by France and Slovenia (Figure 59).

USA: no available data

The USA imported 1.84 million tonnes of tomatoes in 2020, most from Mexico, and that has increased 0.6% annually since 2016. There is no available data about the export of organic tomatoes to the USA, and the situation differs too much from the EU27 to understand any trend based on EU27 data.

TIPS FOR EXPORTERS

See the EU tomato dashboard, which also includes current price developments of the conventional market: https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/tomato-dashboard_en.pdf



5.2.5. Sweet potatoes



Sweet potatoes have increased in popularity in recent years, gaining markets through changes in consumer behaviour and strong marketing campaigns. The content of minerals, fibre and vitamins (vitamin A, C, and beta-carotene) in sweet potatoes strengthen the immune system and help to lower blood pressure among other health benefits. Sweet potatoes offer a new taste and are considered their texture is liked especially by vegans as a meat substitute (https://www.medicalnewstoday.com/articles/281438#_noHeaderPrefixedContent and <https://www.healthline.com/nutrition/foods/sweet-potatoes#sweet-vs-regular>). The food industry is increasingly using sweet potatoes in soups, prepared meals, baby food, crisps and fries, in demand all year round both in restaurants and in retail stores.

Exports of roots and tubers from ACP countries are limited but have potential in regional markets, mainly because freight costs are too high for international trade compared to their value. However, niche markets such as the organic market, may become potential export markets if producers can fulfil international and organic requirements.

It is expected that European and USA markets will expand further with the potential for imports, but also with an increasing focus on local production.

Orange flesh varieties are the most common in Europe, especially Covington and Beauregard, while white flesh varieties remain more common amongst some consumer groups. In the USA, orange flesh sweet potatoes are also the most common, including Beauregard, Jewel and Garnet.

EU27: +9.7%/year since 2018

Organic sweet potato imports into the EU27 increased by 16% annually between 2018 and 2021, from 3,300 tonnes to 6,000 tonnes (Figure 60). Total sweet potato imports (conventional and organic) increased annually by 9.7% in the same period, therefore the share of organic increased slightly from 2.4% in 2018 to 3% in 2021.

The main suppliers of organic sweet potatoes in 2021 were the USA (21%) and Israel (19%). Imports from the USA decreased slightly between 2018 and 2020, while imports from South Africa boomed in 2021 when it representing 44% of all EU27 imports (Figure 61). Peru and Honduras are also minor suppliers.

The main EU importer in 2021 was the Netherlands (86%) that also re-exported to other EU countries, followed by Germany (5%), Spain and France.

Figure 60: Evolution of organic sweet potato (HS 071420) imports into the EU27, 2018-2021. Source: COLEAD, based on TRACES

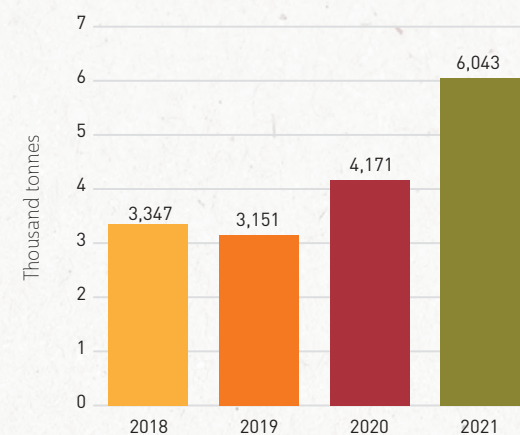
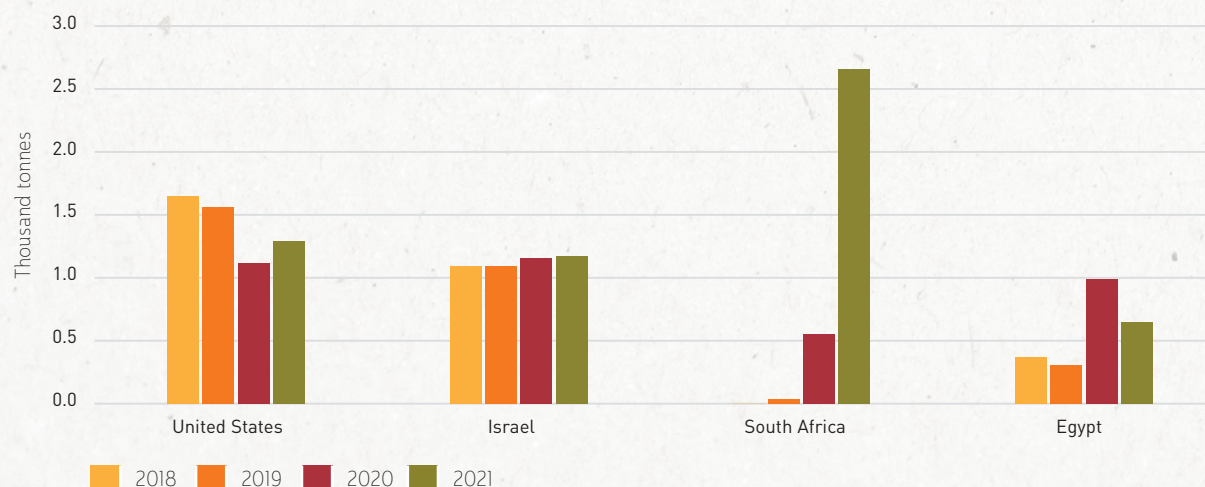


Figure 61: Evolution of organic sweet potato imports into the EU27 by the top four exporting countries, 2018-2021. Source: COLEAD, based on TRACES



USA: large producer and exporter of sweet potato

The USA imported 11,600 tonnes of sweet potato in 2020, with an annual decrease of 2.6% since 2016 when 13,200 tonnes were imported. Half of all imports come from the Dominican Republic, followed by Canada, Honduras and Peru. There is no available data on the import of organic sweet potatoes into the USA. However, as most of the organic sweet potatoes imported in the EU27 come from the USA, it can be assumed that a significant amount of the local production is organic. Suppliers of conventional sweet potato, such as the Dominican Republic and other from Latin and Central American countries, meet the demand for out of season sweet potatoes.

TIPS FOR EXPORTERS

CBI – the European market potential for sweet potatoes: <https://www.cbi.eu/market-information/fresh-fruit-vegetables/sweet-potatoes-0/market-potential>



5.3. Export price information

Price setting for export products depends on a large number of factors and varies greatly in volatile and seasonal markets such as for fresh fruit and vegetables where prices change from one day to the next. In this section, the main factors are listed that are relevant for deciding prices, with some tools and information as to where to find guidelines on price setting.

The main factors that influence prices include the following.

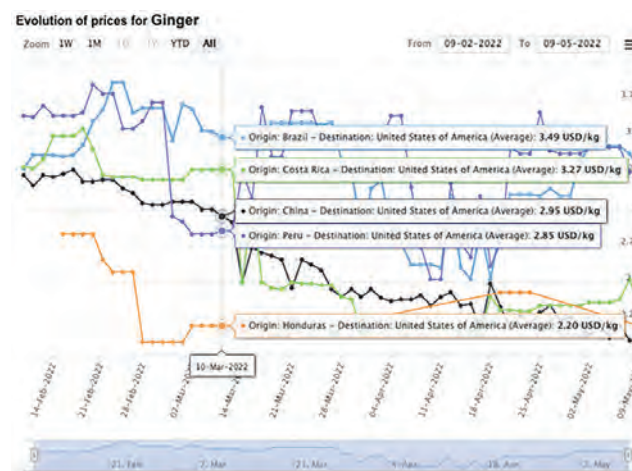
- ← Specific product variety and quality
- ← Purity, ripeness of the product (shelf life)
- ← Country of origin and destination
- ← Size, volume, and quality of packaging
- ← Import volume per year
- ← Conventional or organic
- ← Accredited labels used for organic or sustainable certified products
- ← Private labels or the brand product or ingredient for the processing industry

It is recommended to spend time in researching potential target markets to find average price levels and trend over periods of time. It is also a good advice to link directly (or with the help of consultancies) with potential buyers, to understand in detail the requirements for price calculation.

A good source for finding current price levels is the International Trade Center, that provides a “Market Price Information” tool. This can also be useful for negotiating prices with buyers.

After registration, select product groups and specific products, along with many more categories such as market of origin, target market, packaging and organic certification, etc. Figure 62 provides an example of the result for the price of ginger, with additional information on each dot of the graph, combined with an overview of prices categorised according to the country of origin. Data can also be presented as a table instead of a graph, and are available for download in Excel and PDF versions.

Figure 62: Example of ginger FOB prices depending on countries of origin. Source: ITC Market price information tool



For fresh fruit and vegetables there are different information platforms available for price levels for the European and USA markets (online and print), including the following.

EU Commission: https://ec.europa.eu/info/food-farming-fisheries/trade/agriculture-markets-and-prices_en

- ← Monthly price overviews for avocados: https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/market-prices-fruit-products_en.pdf
- ← Price statistics by membership: <https://www.statista.com/statistics/1202856/average-price-per-kilogram-organic-fruit-vegetables-france-type-store/>

It is also recommended to do a ‘store check’ and understand price levels of different distribution channels and brands. Visit international trade fairs can also provide valuable insights.

TIPS FOR EXPORTERS

For more information, refer to the CBI study on nine tips for organising your exports of fresh fruit and vegetables to Europe including payment terms: <https://www.cbi.eu/market-information/fresh-fruit-vegetables/tips-organise-your-export>

For more information about organic prices in the USA, the US Department of Agriculture publishes information but it is not regularly updated: <https://www.ers.usda.gov/data-products/organic-prices/>





6

SWOT ANALYSIS

Sections 4 and 5 described the local, regional, and international markets for organic products in general, and market opportunities for various fruits, vegetables, nuts and spices. Although most products analysed in Section 5 indicated a growing demand for organically certified products, ACP exporters may face a number of challenges when targeting European or North American markets with organic certified fruit and vegetables. This section discusses the identified pros and cons of these markets with a SWOT (strengths, weaknesses, opportunities and threats) analysis, looking at strengths and weaknesses of ACP exporters, and the opportunities and threats they may face on international markets.

All internally traded food products are part of global supply chains, and it is impossible to include all factors in detail for all supply chains covered in this report. However, the following SWOT analysis provides useful guidance for explaining some of the dependencies in these supply chains. Individual ACP exporters are encouraged to use this analysis as a starting point for their own company's SWOT analysis, before exporting. They should first take steps to understand the requirements, structures and developments of potential target markets, whether they are local, regional or international.

6.1. Strengths and weaknesses of ACP exporters

Strengths	Weaknesses
Availability of tropical products which are not (or hardly) produced in target markets due to them having different climates	Lack of knowledge about potential target markets, target products, and buyer requirements
'Exotic' fruits, spices, nuts and vegetables are much in demand by processors and importers.	Lack of knowledge on organic production, seed management and how to avoid post-harvest losses.
A unique selling proposition is the flavour and added value of some fruits, vegetables and spices, some even called 'superfoods', like ginger, avocados, or virgin coconut oil that can be sold at higher prices.	Local and export logistics are often inadequate and too costly for small farmers to reach target markets, with poor access to cold storage facilities.
Low for land and labour costs compared to target markets.	High dependency on knowledge and expertise from export markets to produce and process fruit and vegetables.
Many ACP countries have available land that are not contaminated by pesticides and industrial chemicals.	Slow adoption of improved agricultural practices.
If practiced well, organic production is more sustainable than conventional production with benefits for the environment, people, and markets.	Limited demand in local markets for organic products.
The potential to use traditional, local knowledge about plants, natural plant protection, maintaining soil quality, etc.	High certification costs, as target markets often require third party certification.
In some ACP countries, government departments, ministries and local NGOs support producers with access to land, finance and knowledge to support organic production.	Lack of effective communication and limited cultural understanding for export business contacts.

6.2. Opportunities and threats for ACP exporters

Opportunities	Threats
Growing organic markets for various fresh and processed fruit and vegetables	The recently decrease in the demand for organic fruit and vegetables in the EU. The size of supermarket shelves dedicated to organic fresh fruit and vegetables has been reduced, whereas demand for local produce has been increasing.
Development of middle classes in towns and cities in producer countries, and demand from local supermarkets and retailers (local and organic) in producing countries.	Limited availability of high quality organic seeds.
Markets in Europe and the USA demand year-round supplies of fresh fruit and vegetables	Competition from larger suppliers of conventional and organic products in the same export season. For various products included in this report production and supplies are concentrated in a few supplying countries.
Potential for developing local and regional markets for organic products as stepping stones for international markets.	Growing urbanisation, and especially of young people, leads to shortages of farm workers.
The option to use participatory guarantee systems (PGS) as a certification model for small farmers, which also helps in cooperation and market access.	Limited access to financial support, with funding for the agricultural sector being insufficient in most ACP countries.
Some governments are supporting farmers or cooperatives directly with programmes for organic production, often in cooperation with international NGO's and buyers.	Global markets are buyer-driven, and have specific requirements and price requests that may be hard to meet for ACP exporters.
Increasing consumer attention for fair and sustainable products in target markets supports products from smallholder farmers.	ACP exporters have high energy dependency for transport and processing, and are strongly influenced by increasing global energy prices.
Improved access to specific markets for fruit and vegetables demand more organic products, including vegan, healthy and "free from" markets	Loss of income in the first three years of organic conversion is expected. As these harvests (not yet certified) need to be sold as conventional, exporters cannot make use of potential price premiums. Yields may also be up to 30% lower.
Local fruit and vegetables are increasingly demanded by the tourism sector, including the increase in 'green tourism' especially after the COVID-19 pandemic.	Damaging effects of climate change, and effects of long-term use of harmful pesticides need to be addressed on the land.
Increasing popularity of 'ethnic' cuisine and exotic fruit, vegetables, spices and nuts.	Negative economic impacts from the COVID-19 pandemic and the Russian invasion of Ukraine, including higher freight costs, logistic backlogs, and lower availability of packaging materials.
Growing local populations and urbanization supports the potential for the horticulture sector to substitute imports, as local demand for fresh fruit and vegetables grows.	Difficulties in sustaining business relationships with international buyers due to a lack of knowledge on how to maintain them.
Growing demand for ready-to-eat products and healthy value-added products from processed fruit and vegetables.	Inability to showcase and communicate unique selling propositions to potential buyers.





7

CONCLUSIONS

This study aimed to provide information to farmers and exporters about global markets for organic fruit and vegetables, especially for the markets in the EU27 and USA, allowing them to make more informed decisions. The report provided ample information regarding the dynamism and competitiveness of the fresh fruit and vegetable market in the EU27 and USA. It introduced organic agriculture and the different certification standards used in key markets, as well as other non-organic sustainability standards and labels. It stated a global overview of production and trade in organic fruit and vegetables, and a deeper look into specific regions.

In order to identify opportunities for ACP suppliers to export organic fruit and vegetables, the report studied the influencing factors for organic products and detailed the main exporting and importing countries, market shares, and trends over recent years for 11 selected export crops, as well as a SWOT analysis.

The opportunities identified are, amongst others, the following:

- There is growing global demand for organic food during the studied period, with strong growth in the USA and EU, as well as in the emerging Chinese market.
- Food consumption trends drive the increased demand for organic food in general, and fruit and vegetables in particular, further intensified by the COVID-19 pandemic and the Green Deal in the EU.
- The supply of organic products is growing in ACP countries. And as the use of agrochemicals is already low for some of these, it can be an incentive to convert to organic farming.
- For a number of products covered in this study, there is limited or no production in European countries or the USA.

But in contrast, there is strong competition from non-ACP suppliers, so exporters in ACP countries need to define their competitive advantages and unique selling propositions.

Furthermore, there are some indications of slower growth in organic consumption in the EU market in 2022 compared to 2021, as a consequence of global crises and a reduction in purchasing power in 2022. It acts as a sort of slight market correction after the strong growth in 2020 and 2021. Still, the growth seems continuous compared to 2019.

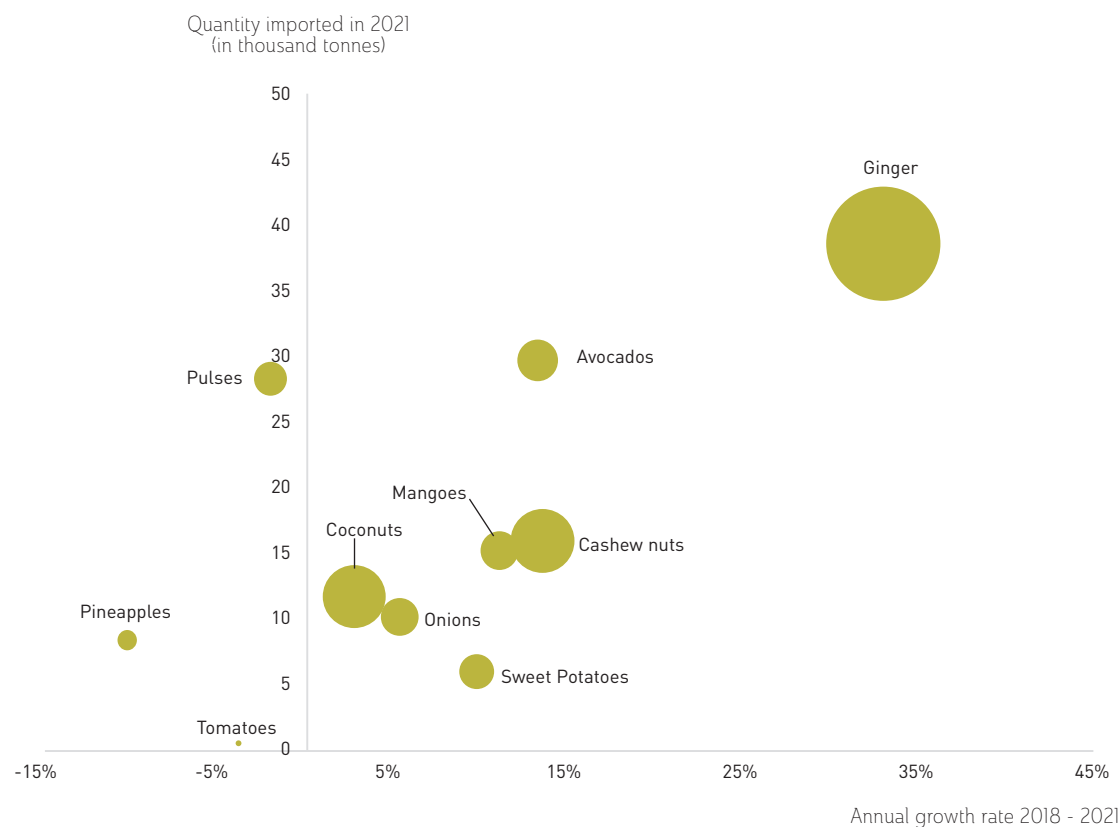
In addition to identifying opportunities and threats, this conclusion aims to summarize the analysis of the 11 selected products. Figure 63 and 64 illustrate the products for the EU27 market and the USA, as the analysis covers different periods for each market, and data for the USA market is not available for all organic products.

The bubble graph in Figure 63 summarizes the 11 key products for the EU27. It plots the annual growth rate of their imports to the EU27 between 2018 and 2021 on the x-axis, the quantity imported in 2021 on the y-axis, and the size of the bubbles represents the share of the product's total imports (conventional + organic) that are organic. Products located furthest up and to the right on the graph show the greatest opportunities for growth, and the larger the bubble, the higher the share of organic imports as a portion of total imports, indicating higher demand for the organic version of the product. Bananas are not included in the scale due to their high import volume (721 thousand tonnes in 2021). Their annual growth rate is of 12.5%, with 13.7% of total imports being organic (larger than cashew nuts at 10.3%).

A few observations:

- ← Ginger appears as a growing opportunity, as large quantities are imported, these are growing at a high rate and organic ginger represents a high share of the conventional ginger imports.
- ← Avocado imports show a high annual growth rate above 13%, reaching interesting quantities. However, most of the increase is accounted for by Peru, but avocados from Kenya and Dominican Republic are growing as well.
- ← Cashew nuts, although in smaller quantities, could offer possibilities for growth from ACP countries, such as Burkina Faso, Côte d'Ivoire, or Benin. Cashew nuts imports from these countries have grown steadily between 2018 and 2021 already and organic cashew nuts have a large share of the cashew nuts imports.
- ← Leading the organic fruit market in the EU27, bananas imports are very high and are still at a high growth rate, but the main suppliers are well installed, being Ecuador and the Dominican Republic.

Figure 63: Summary graph of the key products imports to the EU27, based on their annual growth between 2018 and 2021 (x-axis), the quantity of import in 2021 (y-axis) and the share of total imports (conventional and organic) that is organic (bubble size). Excluding bananas: 721 thousand tonnes of imports in 2021, 12.5% annual growth and 13.7% of the total imports are organic.

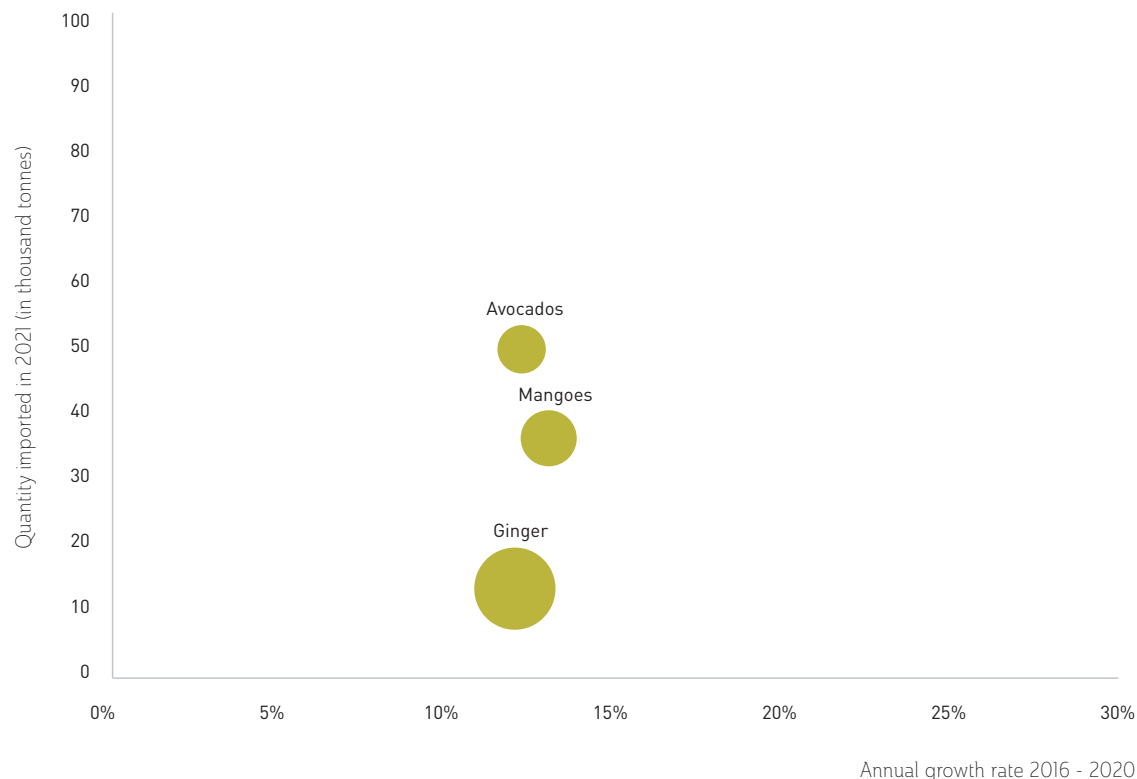


The bubble graph in Figure 64 summarizes the key products for the USA, only showing the 4 products for which detailed data is available: avocado, banana, mango, and ginger. It links the annual growth rate of their imports to the USA between 2016 and 2020 on the x-axis, the quantity imported in 2020 on the y-axis and the size of the bubbles represents the share of the product's total imports (conventional + organic) that is organic. Therefore, the products furthest up and on the right of the graph are the ones showing growing opportunities, and the bigger the bubble the higher the share of organic import on total import of this product, showing particular interest in the organic version of the product. Bananas are not included in the scale due to their high import volume (529.7 thousand tonnes in 2020). Their annual growth rate is of 7.4%, with 11% of total imports being organic (larger than mangoes that is at 6.2%.

The fact that there is no detailed data available for the organic imports of the other products shows in itself that it is not (yet) considered a key organic imported crop for the USA. For example, data on organic cashew nuts are not available while the interest in organic cashew nuts in the EU27 is growing. The same can be said for organic coconuts.

The next section gives further detailed information, including general recommendations for exporters to fully exploit the opportunities and strengths to access international markets for organic fruit and vegetables.

Figure 64: Summary graph of the key products imports to the USA, based on their annual growth between 2016 and 2020 (x-axis), the quantity of import in 2020 (y-axis) and the share of total imports (conventional and organic) that is organic (bubble size). Excluding bananas: 529.7 thousand tonnes of imports in 2020, 7.4% annual growth and 11% of the total imports are organic.





APPENDIX

In order to provide further useful information, this section contains recommendations for ACP exporters to exploit the opportunities, it gives extra useful resources, as well as the complete bibliography used in this report.

Appendix 1 – Recommendations

This appendix presents recommendations for ACP exporters, to fully exploit the opportunities and strengths to access international markets for organic fruit and vegetables. These are grouped into three categories: market selection and marketing approaches, develop and maintain successful trade relationships, and local and international cooperation.

Table 5: Summary of recommendations

Recommendations	
Market selection and marketing approaches	Undertake market research to match products to the most appropriate markets, set realistic objectives, and understand what buyers expect.
	Determine whether organic certification is needed and feasible before starting to make investments.
	Build unique selling propositions and how products stand out from competition.
	Develop a sales and marketing strategy that allows the efficient use of time and resources, and to target markets and buyers more effectively.
Develop and maintain successful trade relationships	Ensure a high and consistent level of product quality, that is key in the fresh fruit and vegetables sector.
	Be proactive, honest and clear when communicating with potential buyers.
	Build trusting business relationships with existing buyers, understand clients, their demand, minimum requirements, and their preferred ways of working.
Local and international cooperation	Engage with local stakeholders such as politicians and NGOs, to find ways to improve logistics and trade, and to obtain support for farmers to adopt sustainable and organic production.
	Collaborate with international support organisations to facilitate market access.
	Cooperate with other exporters to reach scale if this is required to meet the minimum volumes required.
	Find a lasting logistics partner.

Market selection and marketing approaches

Match your products to the most appropriate markets

It is important to conduct market research into target markets before starting to export. This will help to understand and select the right export products and target markets, and that may be, or include, those in the region. Building knowledge of target markets will also help to set realistic objectives and help to build a reputation with potential customers, as buyers will expect suppliers to know the market that they operate in.

Beyond getting information through market studies, such as this report produced by COLEAD through the FFM+ programme, research is needed on key elements such as trade flows and structure, distribution networks, market trends, and the competitors from other producing countries. The following main factors influencing market demand should be included.

- ← The crops and varieties that are demanded by the target markets, and in which periods of the year.
- ← The precise markets including segmentation, as produce may be used to produce a large number of end products.
- ← The type of offer that is in demand, for example, whole fresh fruit, freshly cut, or ready-to-eat.
- ← The types of packaging that are preferred by importers or processors.
- ← The best channels to reach target markets, such as through importers in trade hubs like the Netherlands or Spain, or directly with the right quality and type of product.

- ← Type of distribution channels in target markets, and identification of their import partners. Some importers do not import organic produce, whereas others importers are organic specialists.
- ← The types of buyer most suited to the offer, that will depend on their size, requirements, market segments, and type of company (e.g. traders or processors).

Based on market research into local, regional and international markets, and a SWOT analysis for the exporting company, select the market that is best matched for the company and products. This may also be a local or regional market, especially if produce is not (yet) certified organic, if they do not match demands and requirements of international markets, or if a growing national market offers adequate opportunities. National and regional market can be effective stepping stones for reaching international markets as a long term objective.

Determine whether organic certification is needed and feasible

In market research, consider which sustainability system is in demand in the target market. Does the market demand organic produce, or labels covering other aspects of sustainability such as social standards? Without organic certification, would it be possible to conform to sustainable standards with conventional fruit or vegetables, and if so, what is the competition from existing suppliers?

Before deciding to obtain organic certification, build an understanding of the organic market, its developments, and what is needed to achieve certification. Determine what investments are

needed and whether sufficient sales of organically certified products will be expected to offset investments. Make a thorough cost calculation for certification, acknowledging that the prices obtained for certified products will vary depending on variety, quality, yield, or other value additions. Find out if financial or operational support is available for obtaining certification, and existing or potential buyers may be able to provide such information.

If certification is not feasible, target other markets. If sustainable production is demanded by target markets, identify other ways to demonstrate this, such as by comparing it to a buyer's sustainability codes. It is important to document findings and explain how sustainability risks for specific products are overcome. Transparency and traceability in supply chains is becoming increasingly important, and that requires thorough documentation.

If certified organic production and export is the goal, it is important that all staff in the farm and company understands and lives by the concept, even during the conversion period. This will help to overcome obstacles together, and to improve awareness of what it means to be organic.

Build your unique selling proposition

Market research will have revealed what is in demand on the market and what competitors are offering. This will help to determine how to stand out. When identifying unique selling propositions or unique buying reasons, answer this question: What makes the product/company more interesting than the competition?

Identify what the company does well, what the consumer wants, and what competitor do not offer. This is the unique selling proposition. If competitors meet certain consumer needs better, stay away

from them. If competing in areas that customers do not care about, this is a wasting of time and resources. Be aware that if a company and its competitor meet customer needs equally well, competition will be fierce. In such cases, pricing will play an important role in purchasing decisions.

Develop a sales and marketing strategy

Having a sales and marketing strategy gives direction, help to use time and resources efficiently, and to target markets and buyers more effectively. This strategy should also consider including attending events such as trade fairs, and other promotional activities.

A sales and marketing strategy consists of the following elements.

- ← **Product offer:** details of the current product range, and what is offered in a target market.
- ← **Target market:** specification of the target region or country, to enable you to identify the most promising and suitable segment for each product.
- ← **Distribution channels:** those through which fresh fruit and vegetables will be distributed, i.e. directly to retailers, or through wholesalers or importers.
- ← **Pricing:** details of pricing policies, including price flexibility mechanisms to promote sales such as discounts, quantity offers and contractual tenders, etc.
- ← **Promotion:** a description of a company's target groups and promotional tools, such as its website, social media, brochures, etc., and the promotional messages that they contain. Messages and tools may vary depending on the target group.
- ← **Sustainability:** details of a company's policy on social responsibility and accountability, including

issues such as occupational health and safety, human rights, child labour, and environmental aspects.

- ← **Unique selling proposition (USP) or unique buying reason (UBR):** specifying the factors that make products more interesting than those of competitors. For example, with unique or superior varieties of certain fruit and vegetables, approach specialised buyers.

Develop and maintain successful trade relationships

Ensure a high and consistent level of product quality

Producing a high, consistent and regular level of product quality is key in the fresh fruit and vegetable sector. Monitor quality by following international quality and marketing standards that each product needs to comply with, such as the UNECE (United Nations Economic Commission for Europe) standards for fresh fruit and vegetables and associated legislation (<https://unece.org/trade/wp7/FFV-Standards>). Following good agricultural practices is important to ensure product quality and food safety. Each buyer will also have their own requirements on quality, as well as expectations on production, grading, and packaging.

Be aware that quality requirements are not open for discussion. They are commonly a reason for buyers to file claims against exporters, based on conclusive visual proof.

Be proactive, honest and clear with potential buyers

When communication with potential buyers, it is important to be proactive, straightforward, honest and clear. Buyers will expect quick replies quickly to messages, preferably within a business day. This

requires good Internet connection and the need to regularly check messages. Inform clients regularly regarding information in production, planning and shipments. If there is an issue, inform clients directly, offer potential solutions, and discuss the possible consequences of different actions or inactions.

When approaching potential buyers, be well prepared. Know the strengths and weaknesses, and unique selling propositions. Buyers receive requests from suppliers all over the world, so it is essential to stand out. Participate in international trade fairs provides added opportunities.

Build trusting business relationships with existing buyers

There is strong competition in the fresh fruit and vegetable sector, but buyers do not like to switch suppliers often. Having a reliable partner that can continually deliver a supply of consistent quantity and quality is more important. To develop a good relationship with potential import partners requires the building of trust over months or even longer, to understand a client, their demands, minimum requirements, preferred way of working and limits to their flexibility.

Preparation is key when meeting potential buyers. Ensure meetings are with the right person, set clear objectives if possible, and defining which products will be discussed. Before meeting, prepare a pitch, to present the company, products, and the USP. Listen and ask questions to better understand the potential client. Take notes of important information to support your follow-up. Maintain regular communications afterwards, and take any opportunities to meet again, and invite potential buyers to visit production sites.

Buyers will expect full respect for all agreement made. Be honest and transparent, and do not make promises that cannot be kept. Being able to supply regular shipments is important in the fresh fruit and vegetable trade. Verify with a potential buyer what minimum volumes are required per week and determine if such demands can be met. Thoroughly plan production, buying of inputs, packaging materials, processing, and logistics, to ensure that agreed volumes and deliver dates can be met.

Local and international cooperation

Engage with local stakeholders

Cooperating with local politicians and NGOs can help to find ways to improve logistics and trade, while also identifying how to access support for farmers to adopt sustainable and organic production methods.

Contact the chamber of commerce for tips or services to find potential buyers. Relevant sector associations can help to find relevant information on different sectors and target markets. As members of such associations, buyers may also be able to help. Business support organisations and export promotion agencies also offer services and support in finding buyers, and organising participation in trade missions and trade fairs.

Collaborate with international organisations to facilitate market access

Cooperating with international institutions or trade promotion organisations may help to organise and increase exports. They can help with technical and market information, export training, and in making contact with buyers. Examples of such bodies include those in the following (non-exhaustive) list.

- ← COLEAD(former COLEACP): provides a range of expertise and tools to facilitate access to markets, in particular in the fruit and vegetable industry for ACP producers and exporters. www.colead.link/
- ← Centre for the Promotion of Imports from developing countries (CBI) in the Netherlands provides a wide range of market studies and export coaching programmes. www.cbi.eu/
- ← Import Promotion Desk (IPD) is a German promotion agency that brings together the interests of German importers with those of exporters in emerging growth markets. www.importpromotiondesk.com/en/
- ← International Trade Centre (ITC) is a development agency for sustainable trade that provides useful publications, and its SME Trade Academy offers online courses (some are free of charge), including on international transport and logistics. <https://learning.intracen.org/>
- ← Food and Agriculture Organization of the United Nations (FAO) publishes lists of product standards in the Codex Alimentarius, as guidance for exporting fresh fruit and vegetables. www.fao.org/fao-who-codexalimentarius/codex-texts/list-standards/en/
- ← International Trade Administration in the USA provides a sample export plan and Export Solutions that contain additional relevant information. www.trade.gov/
- ← iCRA is a Netherlands based organisation that provides agribusiness training courses and tailored support to individuals, organisations and businesses in the Global South. www.icra.global.

Cooperate with other exporters to reach scale

The international fruit and vegetable market is known to require large minimum volumes on a regular basis. A container load is a minimum for most mainstream products, often weekly. This may not be feasible for smaller or new suppliers to achieve. In those cases, consider cooperating with other suppliers in the country or region to consolidate supplies. Always ensure traceability of products in a consolidated container load, in case of supply issues or quality inconsistencies.

Find a lasting logistics partner

Logistics play a crucial role in fresh fruit and vegetable trade. Ensure that products are maintained in a perfect condition throughout the supply chain. This is likely to require a cold chain – a temperature-controlled supply chain from harvest to sale. Ensure that products are properly loaded and cooled before and during shipping. It will be helpful to work together with logistics partners in the exporting and importing countries, and this is crucial in order to export directly rather than through other trading countries.

Appendix 2 – Useful tools and sources

Following some further tools are listed for information and trade:

- ← OnlinelibraryofCOLEADcontainingmanymarket studies on general regions and specific products in the fruit and vegetable industry
<https://resources.colead.link/en/library>
- ← AnalyticspageofCOLEADcontainingdashboards with up-to-date information on the fruit and vegetable sector such as trade info, production or interceptions.
<https://www.colead.link/analytics/>
- ← Infographicsaboutorganicproductionandtrade
<https://www.organic-world.net/yearbook/yearbook-2018/infographics.html>
- ← Global organic equivalence tracker
<https://www.ifoam.bio/our-work/how/regulation-policy/organic-equivalence>
- ← Seasonal calendar for fruit and vegetables
https://www.importpromotiondesk.de/fileadmin/user_upload/Publikationen/andere/IPD_Seasonal_calendar_fruit_and_vegetables_final.pdf
- ← GIZ / Boosting organic trade in Africa
<https://www.giz.de/en/downloads/giz2021-en-boosting-organic-trade.pdf>
- ← ITC / Export potential map
<https://exportpotential.intracen.org/en/products/gap-chart?fromMarker=i&exporter=498&toMarker=w&market=w&whatMarker=k>
- ← UsefulimportdocumentsfortradewithEurope
https://ec.europa.eu/info/food-farming-fisheries/farming/organic-farming/trade_en



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