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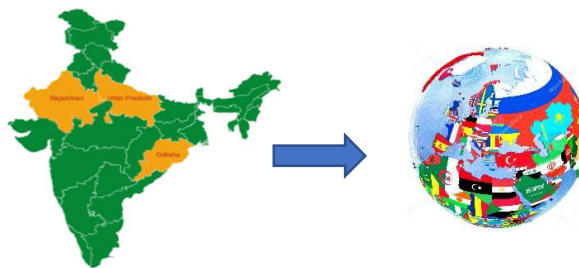


Federal Ministry
of Food
and Agriculture

by decision of the
German Bundestag



European Union Market Regulations and Specifications for exports of Mangoes



**Developed under the
Project**

**Indo-German Cooperation
on Agricultural Market Development**

Table of Contents

The European Market for Mango.....	3
Fresh Mango.....	3
Frozen Mango.....	5
Processed Mango	6
Mango Pulp / Puree	7
Canned and Bottled Mango.....	9
Dried Mango.....	9
Specific Requirements of the European Market for Mangoes.....	11
Legal Requirements – The Must Have	11
Traceability	12
Packaging and Labelling Requirements	13
The Common Non-Legal Requirements.....	13
CSR - Corporate Social Responsibility	14
Good Business Practices	16
Representative Samples and Analysis	17
The Niche – Organic and Fair-Trade	18
The Organic Market	18
Fair-Trade Market.....	19
How to Find Access to the European Market	20

Indian Fresh Mangoes

The European Market for Mango

The mango market in Europe is very diverse. It is not possible to describe "The Mango Market" as such. Mango is either traded as fresh fruit, frozen, processed (pulp or canned / bottled), dried or freeze-dried. The different mango products target different market segments and different importers. Dried mangos are part of the dried fruit and nuts market segment, while mango pulp and frozen mango are of interest of the dairy sector, but also the jam and juice sector. Freeze dried may also belong to this dairy sector, but also is of interest of the dried fruit and nut sector.

In case of the fresh sector, it depends very much on the quantities and kind of existing certificates of the exporter. Supermarket chains like REWE in Germany, Sainsbury's in the UK could be interesting business partners, but large quantities are a precondition.

It is therefore important to first define what mango product and how much can be offered to the European market and then search for potential buyers.

Fresh Mango

Important varieties and hybrids for the European market include Kent, Keitt and alternatively Palmer. The fibreless varieties are most in demand because of consumer preference. The two Indian varieties Alphonso and Kesar are of minor interest and need to be air freighted.

Important mango varieties in EU market are Kent, Keitt and Palmer

The two Indian varieties: Alphonso and Kesar are of minor interest for the fresh market

The two Indian varieties are tree-ripened and therefore air-freighted. This provides the best taste compared to ripening in the destination. However, technology with ripening is quickly improving and specialised companies offer fruit ripening as a service. Due to environmental concern, an increasing number of consumers in Europe prefer local seasonal fruits and in case of tropical fruit they prioritize fruits, which are imported by ship. Air-freighted fruits are regarded as having detrimental effects on the environment.

The fresh mango market in Europe has grown as the price has decreased in the last years. In the long-term it is expected that the market will continue to grow. Main problem currently is a steady supply. The covid pandemic has resulted in a great disturbance of the market. Supply chains were broken up because of lock-downs and unavailability of containers or if available tremendously increased prices for them. Importers demand proof of continuity from new suppliers.

Imports of fresh mango to the EU reached 352,000 tonnes in 2020. Imports from tropical countries is steadily grown, while imports from other non-EU countries like the USA and Israel has flattened.¹ Spain is the largest European mango producers.

Short harvest periods and different season in different producing countries and of different varieties makes supply chain management difficult for European traders. Supermarket chains usually demand a continuous supply of a product over a longer period. European traders are in search for reliable continuous suppliers to enable management of the supply chain. Quality criteria are very high and smaller growers might find it difficult to achieve the high product quality expectations of European buyers.

Newcomers in the European market must ensure a reliable and quality supply.

The Netherlands are by far the largest importer of fresh mango. The Netherlands are the entry point to Europe and re-export to Germany, the United Kingdom, France and Portugal. While the French and Portuguese value a good taste, Germany and the UK prefer the highest certification standards.

**The Netherlands is the largest importer for fresh mango
Germany and the United Kingdom are interesting target markets**

Germany is the largest consumer of mangoes in Europe and should therefore be an interesting destination for exporter. However, supply and food safety must be well managed. The UK offers potential markets in diversification and ethnic markets.² Spain is a producer, but at the time being one of the fastest growing importers for mangoes. Spain is developing itself as a trade hub for mangoes.

Some potential importers for fresh mangoes in Europe are listed below:

Potential importers for fresh **conventional** mangoes in Europe:

NL	Greenyard Fresh	www.greenyardfresh.nl Nijverheidsweg 4 2742 RG Waddinxveen
NL	Westfalia Fruit	www.westfaliafruit.com Honderdland 260 2676 LV Maasdijk
NL	Roveg	www.roveg.nl Nijverheidsweg 4 2742 RG Waddinxveen
NL	Yex	www.yex.nl ABC Westland 1230 2685 DB Poeldijk
BE	Special Fruit	www.specialfruit.com Europastraat 36 2321 Hoogstraten
DE	Landgard	www.landgard.de Veilingstrasse T1200

¹ The EU market potential for mangoes, CBI, Dec. 2021

² The EU market potential for mangoes, CBI, Dec. 2021

		47638 Straelen-Herongen
DE	REWE, (supermarket chain)	www.rewe.de Domstrasse 20 50668 Koeln
ES	Reyes Gutierrez	www.reyesgutierrez.com C. Cam. De malaga, S/N 29700 Velez-Malaga, Malaga
ES	Axar Fruit	www.af-group.es Puente Alta s/n. La Vinuela, CP 29712 Malaga
FR	SodepEx-Inter	www.sodepex-inter.com 28 av des pépinieres, 94260 Fresnes
UK	Sainsbury's (supermarket chain)	www.sainsburys.co.uk 33 Holborn London EC1N 2HT
UK	Tesco, (supermarket chain)	www.tesco.com Cheshunt, Hertfordshire

Besides the conventional market the organic market segment offers good opportunities as well.

Potential importers of fresh **organic** mangoes in Europe:

NL	Eosta	www.eosta.com Ijsermanweg 15 2742 KH Waddinxveen
NL	Nature's Pride	www.naturespride.eu/nl Honderdland 611 2676 LV Maasdijk
NL	Fairtrasa	www.fairtrasa.com Galgeweg 8 2691 MG's Gravenzande
FR	Bonabio	www.bonbabio.jimdosie.com 34 Avenue de la Villette EOg Buildinbg, Rungis Market 94550 Cheville-Larue

Frozen Mango

Frozen mango is demanded by the jam, dairy and juice industry in Europe. In addition, an increasing number of working people around the globe and a hectic lifestyle is boosting the growing demand for convenience food, including frozen fruits in general. Mango is by far European consumers' favourite tropical fruit.³

The freezing process is used for the long-term storage of various fruits and vegetables, supplying them with an increased shelf-life. The method requires reducing the temperature of the substance to -18 C° or below. Frozen fruit is kept at a temperature usually below -9.5

³ <https://octofrost.com/news-room/iqf-tropical-fruit-regional-analysis>

C, at which all moisture is removed and converted into a solid-state. This stops the growth of microorganisms, slows down degradation and, in effect, helps keep fruit fresh for a long time to come.⁴

Frozen mangos are a unique fruit with multiple varieties and characteristics. For frozen mango, firmness and brix are important characteristics, and buyers look for a homogeneous product with consistent size at specified flavour and BRIX levels. Although varieties and origin are of extreme interest in the initial phases of the value chain, end users are looking for case-to-case, container-to-container and package-to-package product consistency.⁵

According to Businesswire, the Global Frozen Fruits Market size is expected to reach \$4.9 billion by 2026, rising at a market growth of 8.6% CAGR. Market Research.com describes a growing demand for frozen tropical fruits (pineapple, mango, banana and papaya) at CAGR of 9.21% between 2022 and 2028.⁶ Kbv research describes a growth rate of 8.2 % between 2022 and 2026. ⁷Freezing mangoes can increase supply periods and provides value addition to exporters.

Potential importers of frozen mangoes in Europe

BE	Greenyard Frozen	www.greenyard.com Strijbroek 10 2860 Sint-Katelijne-Waver
NL	Ardo Ardoie	www.ardo.com Wezestraat 61 8850 Ardoie
FR	Les Fruits Rouges	www.fruitsrougesandco.com 17 Rue de Milly 77760 Chevrainvilliers
FR	Simpplier	www.simpplier.com (easy and competitive sourcing)
DE	Binder International	www.binder-international.com Otto-Hahn-Strasse 19 71083 Herrenberg
DE	Henry Lamotte	www.lamotte.de Merkurstrasse 47 28197 Bremen
IT	Mazzoni Spa	www.mazzonigroup.com Via del Mare 4 44039 Tresigallo FE
IT	Frozen Fresh Fruit	www.frozenfreshfruit.com Consolata Street 12073 Ceva

Processed Mango

⁴ www.mango.org

⁵ Bsinesswire, 06.07.2020

⁶ Market Research.com; Global frozen tropical fruits, Market Report

⁷ European Frozen Fruit Market by Product <https://www.kbvresearch.com/europe-frozen-fruits-market/>

Mango Pulp / Puree

The demand for mango puree in Europe is raising. This is partly driven by the popularity of smoothies, but also the flavour as such. Mango puree is increasingly used for juice, jams, in baby food, bakery, dairy products, and others. Main markets for mango pulp/puree are: the Netherlands, the United Kingdom, Germany, France, Spain and Portugal. Mango pulp is traded in aseptic containers at room temperature or frozen.

The largest producer of mango puree is India, accounting ca. 75% of global production. Other producing countries are in Latin America, but also Pakistan, Vietnam and South Africa.⁸ There are many varieties used for producing mango pulp, but the leading varieties are the Indian Alphonso, Totapuri and Kesar.

⁸ The European market potential for mango puree, CBI, March 2021

**Leading varieties for producing mango pulp are
the Indian Alphonso, Totapuri and Kesar**

It is expected that the demand for mango pulp in Europe will grow at a growth rate of 5 to 7%. Leading European importer is the Netherlands comprising around 45% of all imports. But here again, the Netherlands are the entry point to Europe and re-export most of the quantities to other European countries. India is the largest supplier of mango puree to the Netherlands. Main importers are large beverage industry.

Highest consumption is in the United Kingdom, Germany, France, Spain and Portugal. These countries may offer good market potential for new Indian exporters. Germany is especially interesting for suppliers of organic mango pulp. While the Netherlands, the United Kingdom, Germany, France and Portugal import mainly from India, Spain prefers to sources mango puree from Mexico

Potential importers for mango pulp and juice in Europe

DE	Doehler	www.doehler.com Riedstrasse 7-9 64295 Darmstadt
DE	Binder International	www.binder-international.com Otto-Hahn-Strasse 19 71083 Herrenberg
DE	Tropextrakt GmbH	www.tropextrakt.com Hagenstrasse 11 60314 Frankfurt am Main
DE	Klaus Boecker GmbH	www.boecker-gmbh.com Harburger Str. 47 21614 Buxtehude
DE	Goebber GmbH	www.goebber.de Bahnhofstr. 40 27324 Eysstrup
NL	Vero Bio (organic)	www.vero-bio.com De Krozenbogerd 12 a 6658 KC Beneden-Leeuwen
NL	ADM Wild	www.adm.com Capriweg 4 1044 AL Amsterdam
NL	Infra Foodbrands B.V.	www.riedel.nl Hogehilweg 4 1101 CC Amsterdam
ES	Universal Iberland	www.universaliberland-.com Parque Empresarial Base 2000, Avenida n'3 s/n 30564 Lorqui Murcia
UK	Refresco Gerber UK Ltd.	www.refresco.co.uk/uk/ Express Park Bristol Rd. Bridgwater TA6 4AN

Canned and Bottled Mango

Canned and bottled mango -as tropical fruit in general- possess a little increasing demand in Europe. The annual growth rate is expected at 1 to 2 %. European consumers prefer fresh or frozen fruits instead. Preference for canned fruits is for products soaked in their own natural juice instead of sugar syrup. Especially products produced in a sustainable and environmentally friendly way that contribute to a healthy lifestyle will have better opportunities to enter the European market.

Europe is the largest market for canned fruits and vegetables in the world, representing more than 40 % of global imports. Products which can be packed in bulk packaging (such as drums) offer better opportunities compared to retail-ready products.⁹ Germany is the largest market for canned and bottled fruits and vegetables. Germany provides also good opportunities for organic products.

Potential importer for canned and bottled mango in Europe

DE	Henry Lamotte	www.lamotte.de Merkurstrasse 47 28197 Bremen
DE	Otto Franck Import	www.ottofranck.de Staetzlinger Str. 63 86165 Augsburg
DE	Kreyenhop & Kluge	www.kreyenhop-kluge.de Industriestr. 40 28876 Oyten
DE	EgeSun, organic	www.morgenland.bio Lübkenmannstr. 7 28876 Oyten

The United Kingdom and France are second and third largest markets after Germany. The Netherlands and Belgium are among the top 6 importers for canned fruits, but re-export most quantities.¹⁰

Dried Mango

According to CBI, the market for dried mangoes has continuously grown between 2016 and 2020 at a growth rate of 10 to 12%. It is estimated that the increase will continue, but at a slightly lower rate of 6 to 9 %. It is estimated that around 70% of the imported quantity is conventional, 25% organic and 5% sweetened dried mango.¹¹ The market share for dried organic fruits and nuts generally is far above the average organic food share of total food in the EU.

Germany and the United Kingdom are the main importers, processors and retail packers. The UK provides good opportunities for fair trade certified dried mangos, and Germany provides specific opportunities for organic dried mangos.

⁹ Exporting processed fruits and vegetables and nuts to Europe, CBI, The market

¹⁰ The European market potential for canned fruits and vegetables, CBI, Oct. 2020

¹¹ The European market potential for dried mango

Potential importers for dried mango in Europe

NL	Berrico Food	Organic www.berricofood.com Dokweg 1 8243 PT Lelystad
NL	Tradin Organic	Organic www.tradinorganic.com Stationsplein 61 1012 AB Amsterdam
NL	Rhumveld Winter & Konijn	Organic & conventional www.rhumveld.com Rivium Westlaan 1e Straat 111 2909 LE Capelle aan den IJssel
DE	Seeberger	Organic & conventional www.seeberger.de Hans-Lorenser-Str. 36 89079 Ulm
DE	Farmer's Snack	Organic & conventional www.farmers-snack.com Beckedorfer Bo'gen 27 21218 Seevetal
DE	Worlée Naturprodukte	Conventional & organic www.worlee.de Grusonstrasse 26 22113 Hamburg
FR	Maitre Prunille	Conventional www.maitreprunille.com Sauvaud 47440 Casseneuil
PL	BioPlanet	Organic www.bioplanet.pl Fabryczna 9B 05-084 Leszno

Switzerland and the Netherland are entry points for dried mango to Europe and re-export large quantities to other European countries. France is also an interesting market with a growth rate of 15%, but importers prefer suppliers from French-speaking West African countries.

Different types of dried mangoes offered to the market are:

- Dried mango
- Soft dried mango
- Dried mango cut in different cube sizes for breakfast cereals and cereal bars.
- Mango fruit chips
- Freeze dried mango

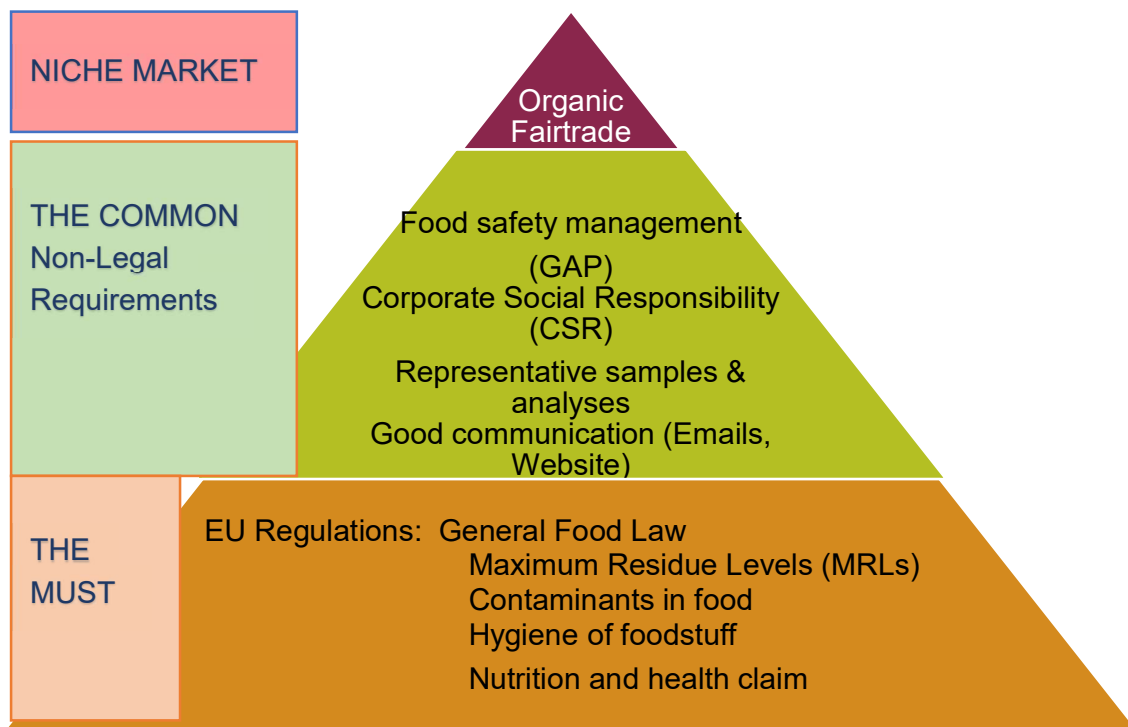
Specific Requirements of the European Market for Mangoes

In order to export to the EU, you have to comply with specific requirements. There are some requirements that are set by the EU legislation and are thus obligatory. Other requirements are demand driven preferences of European importers, or market trends and consumer preferences. These are, although not obligatory by law, important, since they can improve your competitiveness and help you find purchasers in the European market.

The market requirements can usually be divided into three sections:

1. **The Must have:** Legal requirements for food products
2. **The Common:** Requirements from the customer
3. **The Niche:** Organic, sustainable and fair

Which requirements to consider?



(Source: Legal and non-legal requirements in the EU, IPD presentation, 2018)

Legal Requirements – The Must Have

The MUST are legal requirements. Mangos are categorized as food. A food item, which is ready for use must therefore comply with the European food safety legislations

For **fresh mango** pesticide residues and contaminants are the main issues, besides phytosanitary requirements. The European Union has set maximum residue levels for pesticides (**MRLs**). Fresh mangoes containing more pesticides than allowed will be withdrawn from the market. Pesticide residues in fruits and vegetables are one of the main

risks in food safety in the EU. Importers often carry out residue analysis, which are costly, before forwarding containers to retailer markets. Hygienic handling is a must!

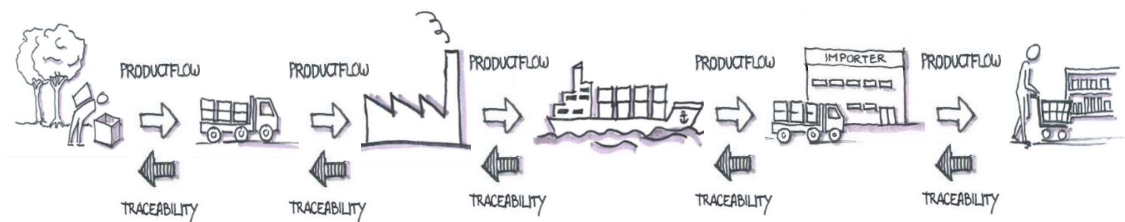
As an exporter of **processed mango** (frozen, pulp, dried), you must demonstrate that your product is safe for use. Microbial contamination in addition must be considered and salmonella and E. coli bacteria must be absent. You must therefore comply with the **General Food Law of the European Union**, which ensures the safety and traceability of your product. Only approved additives are allowed.

Detailed legal requirements are described in the “*study report of requirements (legal, specifications) for Indian exporters to Germany / EU markets with focus on mango and green chilli*”. Product standards can be found among: UNECE standards and ISO-standards.

Traceability

Another important issue regarding the must is **traceability**. It must be feasible to track any food or related substance used for consumption throughout all stages of production, processing and distribution.

Traceability of agro-products



(Source: IPD training on traceability in 2020)

Over the past two decades, food safety related issues and various food scandals in the agribusiness sector have highlighted the importance of traceability, which supports health and food safety by increasing the possibility to track the origin of defective goods by tracing food through the production and distribution chain. Traceability is mandatory within the EU. Today, traceability is furthermore important because the demand for organic, fair trade and environmentally friendly products is increasing. Certification according to any of these standards demand implementation of a traceability systems, even in producer countries. Producer must prove to consumers where and under what circumstances their products have been produced.

Traceability is a risk management tool. It allows a quick detection of the source of quality problems within the production chain. The problem can be isolated by withdrawing or recalling and then preventing that unsafe products reach consumers. Due to identification of problems, measures can be taken to overcome the problems in future. Exporters, who can proof implementation of a traceability system do have advantages to their competitors. They can fetch higher prices and can keep long-term trade links.

The EU has one of the highest food safety standards in the world. Already in 1979, the EU has created RASFF (Rapid Alert System for Food and Feed). It is a system which enables information to be shared efficiently between the food safety authorities of its members states. Thanks to RASFF, many foods safety risks had been averted before they could have been harmful to Europe consumers. For recalling unsafe products traceability is indispensable.

Packaging and Labelling Requirements

Packaging not only depends on legislative requirements. Often, customers have specific demands which can be considered as individual business requirements.

Any Importer demands packaging materials that are:

- ✓ **Free from damage and clean**
Packaging material may also be a source of contamination. To prevent it, always use clean and proper materials and test them for possible contamination.
- ✓ **Adequate for the product:**
Use packaging materials that ensure that the products arrive on the destination market as fresh and intact as possible

Packaging is ruled under Regulation (EC) 1935/2004 “on materials and articles intended to come into contact with food”, in order to protect human health. Such materials shall be manufactured in compliance with good manufacturing practice according to Regulation (EC) No 2023/2006. Materials (e.g., packaging) may not transfer their constituents to food in quantities that could endanger human health, change the composition of the food in an unacceptable way or impact upon the taste and odor of foodstuffs.¹²

If pallets are used, attention should be considered to the **International Standard for Phytosanitary Measures (ISPM) 15** on international trade with wood packing material made from raw wood and to **Regulation (EU) 2016/2031** on protective measures against plant pests, which is based on the ISPM 15 and sets requirements for non-EU imports into the EU of wood packaging material.

According to both regulations, pallets must be heat treated or fumigated to kill insects or fungus conforming to EU rules. The heat treatments must meet the parameters specified in Annex I of the ISPM 15; marked with the ISPM15 stamp consisting of 3 codes (country, producer and measure applied) and the IPPC logo. Fumigation with pesticides bear the risk of residue contamination.

Always discuss the specific requirements for size and packaging with your buyer

The Common Non-Legal Requirements

The common non-legal requirements are often demanded by buyers. Many traders of **fresh produce** in Europe demand a certification according to a standard which ensures a safe and sustainable agricultural production. Most important in Europe is **GlobalGAP**. GlobalGAP certification increases the chance to enter the EU market.

Furthermore, many buyers require besides GlobalGAP additional food safety certifications according to private standards.

The main demanded private standards for food safety are listed below:

¹² <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A32004R1935>

¹⁴ What is CSR?, UNIDO

what the company can control and what it can influence, the latter by collaborating with partners on joint social or environmental initiatives. CSR oriented companies take accountability for their environmental and social impacts and are transparent.

Several European and national initiatives and laws on sustainability and e.g., human rights due diligence are currently being lobbied for or even implemented. This has lately been highlighted by the passing of the **German Act on Corporate Due Diligence in Supply Chains**. As of January 2023, companies operating in Germany will be required to implement measures in their own business operations as well as in the context of a direct supplier's business operation on human right issues. The law will hold German companies – at least to a certain extent – accountable for human rights violations in their international supply chains. France and the Netherlands have implemented similar legal frameworks and more European countries are following¹⁵

Even though small and medium sized companies in non-EU member-state countries do not fall under the new regulations and obligations, it is expected that the new law will impact them indirectly through changed sourcing criteria of importers emphasizing social and environmental sustainability. If exporters do not address issues touched by these new requirements, they may find access to the German and European market difficult.¹⁶ The European trade promotion programmes like the Dutch CBI, the Swiss SIPPO and the German IPD attach high importance to CSR. Exporting companies, who have developed a CSR strategy, including a Code of Conduct and a CSR action plan possess advantages compared to their competitors.

CSR covers among others, issues like:

- Respecting Human Rights
 - Fair wages
 - Decent working time
 - Prevention of forced labour
 - Prevention of child labour
 - Stable employment relationships
 - Etc.
- Labour Practices
 - Health and safety at work
 - Development and training in the workplace
 - Etc.
- The Environment
 - Prevention of Pollution
 - Responsible for waste, water and energy management
 - Limiting greenhouse emissions
 - Compliance with local and (inter-)national regulations
 - Etc.
- Fair Operating Practices
 - Anti-corruption policy
 - Etc.

¹⁵ IPD, Requirements regarding Corporate Social Responsibility

¹⁶ https://single-market-economy.ec.europa.eu/industry/sustainability/corporate-social-responsibility-responsible-business-conduct_en

Good Business Practices

Complying with the food safety requirements, quality standards and certification is a precondition to market mango products in the EU. This is however, only half the battle. Importers are usually looking for **long-term trade links**, today. They select business partners based on **good business practices**. They do not what surprises, but expect deliveries as agreed. They demand clear, honest and fast communication. Even when a supplier cannot answer a question at the time being, he should answer within 2 days latest and inform, when he will be able to give precise answer. Exporters should understand themselves as part of a supply chain. Only when communication is good, fast and reliable, all members of the chain will profit. Whenever there occurs a problem, the importer expects the supplier to inform immediately. This is important so that the importer has sufficient time to look for another supplier this time to satisfy his needs. New exporters in the international trade do often not provide required information in time as they are afraid to lose their clients. The opposite however is true. A supplier, who provides the right information in time, has proven to be reliable and the importer will definitely come back to him.

Reliability is especially important in case of fresh mango exports. As described earlier, management of the fresh mango supply chain is very difficult and needs reliable partners with good communication and consistent supply. Without this, traders will not be able to deliver fresh mangos to the main retail markets, which are supermarket chains.



Importers survey –RESULTS



Source: IPD Presentation, Legal and Non-legal Requirements in the EU, 2018 ¹⁷

The German import promotion programme, Import Promotion Desk (IPD), has carried out a survey among importers on their satisfaction of businesses with new exporters. The result is shown the above in the figure.

¹⁷ IPD Presentation, Legal and non-legal Requirements in the EU, 2018

While the importers had been satisfied with the product qualities and the prices, almost 50% had been unsatisfied with the delivery process and logistics and nearly 60% unsatisfied with reliability of exporters regarding communication and contract details.

**Perfect Communication is a key: clear, honest, fast
Reliability is a must!**

Furthermore, importers want suppliers to properly understand quality parameters and to implement quality assurance systems.

Representative Samples and Analysis

Developing a first consignment usually takes lots of action and time. Importers require a great deal of information on products and the supplier. This is part of the selection process of a new business partner as importers look for long-term partners. In case of processed products importers will demand a sample and will carry out residue and quality analysis in an accredited laboratory. After this arduous process, they usually first order just a test delivery to see and check the export and communication procedure of the supplier. When anything goes well, larger orders will be placed and procedure will go much easier and faster. After having done a pre-selection, importers often visit new potential business partners to see and check facilities.

Contract = Contract!

Importers expect deliveries as agreed. This comprises:
time, specification and quality

Exporters shall develop a company profile and a product specification or Technical Data Sheet (TDS) and ensure that the delivery exactly meets the specification and agreed quality.

Minimum requirements for a general business offer should include:

- ✓ A precise product description - Technical Data Sheet (TDS) or product specification
- ✓ Attached photos of the product(s)
- ✓ Representative sample (for processed and durable products), only when potential buyer shows interest.
- ✓ A price quotation, preferably according to Incoterms 2000
- ✓ Delivery capacity per year
- ✓ Window of supply (seasons)
- ✓ Possible delivery date(s)
- ✓ Export references
- ✓ Quality certificate (GlobalGAP; HACCP, IFS or others)
- ✓ Name of contact person
- ✓ Contact details: address, telephone, fax and e-mail address

A guideline on how to develop a technical data sheet can be found on the web-side of CBI:

[How to prepare technical data sheets, safety data sheets and sending samples for natural food additive? | CBI](#)

Importers in the EU do not accept analysis results from India. The laboratory needs to be ISO/IEC 17025 certified. **Intertek Acucert** based in Mumbai is the first lab in India accredited according to this standard and has achieved accreditation in February 2022. However, the result of analysis furthermore depends on the sampling procedure. Sampling is a critical factor in the testing of a product. Failure to sample correctly, or to understand the variability associated with sampling, may invalidate the overall test result and lead to an incorrect conclusion. Importers therefore prefer to take representative samples themselves and carry out in external accredited labs.

Carrying out own residue analysis is nevertheless recommended, in order that exporters know whether the lot meant for export is residue free.

The Niche – Organic and Fair-Trade

Growing environmental, health and ethical concerns call for specific standards in Europe. These standards deliver on different market segments. Organic and fair-trade markets are still niche markets, although organic is on the way to become mainstream. While the market for organic product in the EU is regulated by public law, the market for fair trade is not. Both markets have in common, that higher prices can be achieved, when the respective standards are met and production is certified. Importers demand a copy of a valid certificate.

The Organic Market

The organic market in Europe is continuously growing. Between 2014 to 2018 organic sales increased by 3.7-times. During the corona pandemic the organic market in Europe experienced a record increase. It increased by 15 % and reached 52.0 billion € in 2020. The value in the European Union had been 44.8 billion, meaning that other European markets outside of the EU are comparatively small.¹⁸ According to Globenewswire the global organic food market was expected to grow from \$227 billion in 2021 to \$259 billion in 2022.¹⁹

In 1993, the EU had been first to enforce a legislation on organic production and labelling. Since then, products may only be sold in the EU as organic; when they have been produced and certified by accredited and approved certification body. India is currently approved by the European Commission under the Equivalence Agreement as having an equivalent regulation fully implemented. However, **the new Regulation (EU) 2018/848 on organic production and labelling of organic products** has come into force beginning of 2022. According to the new regulation third-country producers will have to fully comply with the same set of rules as producers within the European Union. Equivalence agreement has ceased. There is currently a transition period and countries which are currently approved as equivalent with the EU will have to renegotiate the terms of their trade agreement by 31 December 2026.

¹⁸ <https://www.fibl.org/en/info-centre/news/exceptional-growth-of-the-european-organic-market-2020>

¹⁹ <https://www.globenewswire.com/news-release/2022/06/13/2461369/0/en/Organic-Food-Global-Market-Report-2022.html>

Companies who strive for organic certification shall look for accredited and EU approved certification bodies (CBs). The competent authority in India; Agricultural and Processed Food Products Export Development Authority (**APEDA**) can provide a list of approved CBs. Nevertheless, it has to be considered, that the name of a CB is like a trade mark. Some have good reputation while other have not. It also depends on the target market. When it is the USA, a US CB is preferred, when it is Germany a German one is preferred, etc. Five certification bodies have currently been suspended in India by the European Commission due to their failure to comply with European Union standards and ensure contamination-free products. These are Ecocert India, Control Union India, Indocert, Lacon India, and OneCert International.²⁰

Besides the public standard, a number of private organic standards exist and depending which market segment is targeted a private standard certification may be demanded in addition to the public standard certification. Certification according to the public standard is in any case obligatory. The public standard is the minimum standard and private standards are considered as higher standards. Pure organic companies in the EU, who sell to special organic retail markets prefer private label certification like Naturland or Demeter in Germany or KRAV in Sweden and BioSuisse in Switzerland.



Public EU Organic Label



Private label for
bio-dynamic standard



Privat organic label

Fair-Trade Market

Fair-Trade is a private product certification and is based on ethics especially on labour, but also environment. A product with a fair-trade mark means that the producers and businesses have met the stringent fair-trade social, economic and environmental standards. The demand for fair trade labelled products is steadily increasing. Although fair trade is still a niche market, it can provide good opportunities for smaller Indian companies. According to a 2021 GlobeScan survey of consumers in 15 countries, more than 60% of consumers are familiar with the fair-trade mark and of those, 80 % say they have a positive perception of brands that carry it.²¹

As of January 2011, there were more than 1,000 companies certified by FLO International's certification and a further 1,000 or so certified by other ethical and fairtrade certification schemes around the world.²² Since then the sales have steadily increased.

FLO Cert is by far the largest certifier, but there are a number of others.

²⁰ <https://krishijagran.com/agriculture-world/european-commission-to-suspend-five-organic-certification-agencies-from-clearing-exports-of-processed-products-from-india/#:~:text=The%20EC's%20action%20follows%20its,or%20ratifying%20organic%20product%20exports.>

²¹ FLO Cert, 2022

²² FLO Cert list of companies in 2011



FLO Cert



How to Find Access to the European Market

It is not feasible to describe individual importing companies and their special requirements or preferences. This is too diverse and depends on the specific situations. The market works the other way round. The exporter has to make the first step and approach the market. However, before doing so the exporter has to properly study the requirements of the market and to define the product/-s and himself to clearly identify what he can offer to whom and then only contact selected potential importers.

Before an exporter targets a potential importer, he shall first study in detail the legal and non-legal quality requirements of the market. This may already provide some information on the potential market segment, where the product/-s may find a buyer. This may be the organic or conventional market, but also -depending on the quality and certificates the exporter can show-, at the beginning or end of the supply chain in the importing country.

As a next step the product/-s you want to export need to be defined in measurable terms such as factors including product description, exact quality, quantity, relevant technology, certificates, prices and delivery terms. Defining the product limits the number of potential buyers. For example, if you can offer ten tonnes of your product, you can remove all buyers that only deal with full containers from your long list. Some buyers may require a specific variety or quality that you cannot offer. And if you can offer specific products, such as organic products, you should not focus on buyers who only trade in conventional products.

As a next step, investigate the market. This can be done by studying the exhibitor list of relevant large trade fairs like ANUGA: <https://www.anuga.de>, SIAL: <https://www.sialparis.com>, Biofach: <https://www.biofach.de/en> or Food Ingredients: <https://www.figlobal.com/fieurope/en/home.html>, and Fruit Logistica <https://www.fruitlogistica.com>. in case of fresh mango. Based on this a priority list of potential buyers can be drafted.

Next, create a unique selling proposition. In other words: show your buyers why your offer is unique and different from the competition. Importers have their major suppliers already contracted, but receive numbers of offers every week. These offers often get on their nerves and most of them are just dumped in the waste bin. Importers are looking for long-term trade links and demand besides good quality and competitive prices good communication and reliability from new potential suppliers. Cold calling is therefore very difficult. Why should importers be interested in you as a supplier as there are so many others? A number of documents must be developed to demonstrate professionalism. These are among others: a

company brochure, a professional web-site, TDS (or product specification) of individual products to offer, all relevant certificates and price offers.

Final step is to contact potential buyers. This requires good preparation. After definition of your product/-s and analysis of the market develop a list of potential buyers. It is better to have a short list with importers, that really fit with your offer than having a long list comprising many importers, who do not fit. Only communicate with a selected list of potential customers. Your resources should be focused on the ones that are most likely to be converted into actual customers. You may contact potential buyers by email. Certificates should be listed and offered to be transmitted in case of interest. The same is with samples. Only send samples, when a potential buyer shows interest and asks for it. A week after the email, you may contact the company by phone call. A telephone call allows you to personally give a brief introduction of yourself and the company, and it is more effective in catching the target's attention than an email or letter.

The best way however to contact potential buyers, but also to get an overview of the market, the requirements and competitors is by visiting trade fairs. Trade events are perfect place to promote yourself among other companies in target markets. Food trade events in Europe are important platforms for food companies. Trade fair participation is specifically important because it enables potential buyers to see, smell and taste your products.

Here you have the chance to speak to potential buyers and analyse the market, specific quality requirements and your competitors. Relevant trade fairs in Europe are Anuga; Sial; Biofach, Food Ingredient and Food Logistica for fresh mango. European buyers not only visit nearby fairs but also travel to places outside of Europe to look for new suppliers. The most relevant trade fairs attended by European spices and herbs traders outside Europe include the Gulfood <https://www.gulfood.com> or a relevant fair in India.



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