



# The Market for Organic Dried Fruits from Tropical Origins

*Summary of a market study*

June 2003

Author: F. J. Koekoek

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For questions about this document contact:

EPOPA  
PO Box 63  
6720 AB Bennekom, The Netherlands  
Email: [epopa@agroeco.nl](mailto:epopa@agroeco.nl)  
[www.epopa.info](http://www.epopa.info)

## The Objective of the study

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The objective of the study was to give an overview of the European market for organic dried fruits from tropical origins. It was found that this market consists primarily of natural dried mango (spears), pineapple (slices or pieces) and to a lesser extent banana (slices or wholes), in addition to deep-fried, honey-dipped banana chips. The major conventional category of candied tropical fruit, which includes especially pineapple and papaya, is not represented in organic.

## Market size and characteristics

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The natural dried tropical fruits are mainly sold in healthfood shops as snack products and as cooking ingredients. The category is characterized by high prices, simple presentation in single product packs with sometimes a rather cheap image (cellophane) and a dominance of specialised health food brands. The high prices are to a large extent inherent to the expensive and rather difficult production process, which requires large quantities of fresh fruit and tight quality control. Deep-fried banana chips are not inherently expensive, but they lack some of the “natural” appeal of the true *dried* fruits.

Dried tropical fruits face strong competition from adjoining (fruit) categories such as:

- Other natural dried fruits, especially those of Mediterranean origins (apricots, prunes and dates etc.)
- Other tropical dried fruits of a lower quality, especially candied pineapple and papaya;
- Fresh tropical fruits, especially bananas, mango, pineapple and papayas, which are widely available and basically have the same uses (snacking and cooking)
- Tropical fruits, which are otherwise preserved, such as canned and frozen tropical fruits (pineapple, mango, etc.)

This steep competition, the high prices and the rather cheap presentation explain why the use and distribution of natural dried tropical fruits is limited. With the exception of organic banana chips, the tropical organic dried fruits are rarely used as an ingredient for food manufacturing (e.g. snack bars and mueslis). Except in the UK, the products are hardly distributed through the mainstream (supermarket) channel and even there such distribution is limited. The products may have some potential as hearty snacks in the out-of-home market, but this still needs to be demonstrated.

## Opportunities

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Opportunities were measured in terms of size and growth of the particular market segments and the prices paid. Each of the categories of banana chips, candied and natural dried fruits offers opportunities, but they are only small.

Deep-fried banana chips are sold in the order of several hundreds of tons per year and may be expected to grow with the (organic) market. It is a relatively

cheap product that is primarily used in the food industry, e.g. in breakfast cereals. It will eventually be considered as a straightforward commodity, for which prices are dictated by overall supply and demand. As for any commodity, a cost-effective and competitive way of production will be essential.

The market for natural dried mango and pineapple would benefit from an increased distribution outside of the traditional health and organic food channel. Whether this can and will be realized is difficult to foresee. Clearly, it would require an experienced partner to develop this. There is also scope for expansion of sales in the health and organic retail channel, especially if more attractive presentations could be developed. The use of these (natural) dried fruits by the food industry is limited because of the relatively high prices. The irregular and not very homogeneous supply is another barrier for the development of the industrial segment. Nevertheless, these natural dried fruits could be used in high-value products such as fruit and health bars. The organic part of the market for natural dried mango and pineapple is estimated at 500 tons.

While candied fruit products are not yet available in organic versions, this category may actually provide the best opportunity. Especially if both the price and quality of the products would be attractive, there could be substantial demand from food manufacturers of especially the breakfast cereals, confectionery and in dairy industries. Since this potential is not fully tapped, such a scenario would require first of all entering in a dialogue with the food industry, in order to learn about their specific requirements.