

Apples & pears consumption trends

«Understanding consumers expectations»

WAPA



SETTING THE SCENE



- Fruit and vegetables consumption under pressure despite multiple assets and a relatively high penetration rate in most MS > 85%



- Apples and pears face increased internal and external competition



- Consumers are getting more & more fragmented



- Gen Z and Millennials are amongst the lower fresh produce consumers



- Communication channels are changing to reach out to consumers



- Fresh produce incl apples and pears are essentials for a healthy and sustainable diet and as such "public goods", but authorities failed to consider them accordingly

UNLEVELLED PLAYING FIELD ABOUT MARKETING BUDGET BETWEEN AGRIFOOD AND F&V



Limited budget of F&V sector for promotion : 2-3 % of sector turnover => **500 a 600 Million € for marketing**



Agrifood reinvest about 10 % of turnover => **300 billion € for marketing** equivalent to F&V total sector turnover



Misused by Agrifood sector of image of fresh fruit as confirmed by Freshfel study « **Where is the fruit ?** »



Packaging restriction ,– **limited communication tools including on nutritional or envi assets**

CONSUMER'S MISPERCEPTION AND POLICY INCOHERENCE



• PERCEPTION AND IMAGE DEFICIT

- Expensive when cheap
- Unsafe when safe
- Less nutritional value when more
- Role of media and NGo

• F&V AFFORDABILITY

- 5 a day for less than 2€
- F&V cheaper than any other food

• FURTHER VALUE BEYOND PRICES

- Nutritional and Envi assets
- Costs of bad nutrition: 2€ para la seguridad por cada € de «comida»

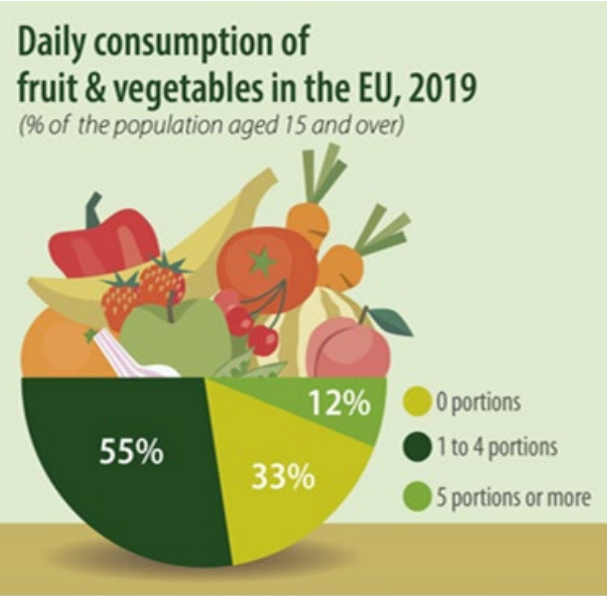
• CONSUMERS INCOHERENCE

- Solidarity for growers but at the cheapest prices
- Prices conscious but ready to buy high value and more expensive berries, fresh cut and IV gama or ready to eat .ripen products
- In time of crisis more risk of unhealthy diet with negative consequences
- Awareness of benefit but no coherent actions

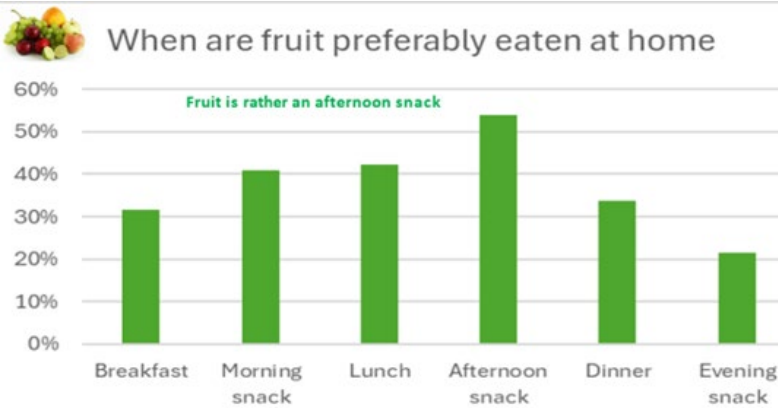
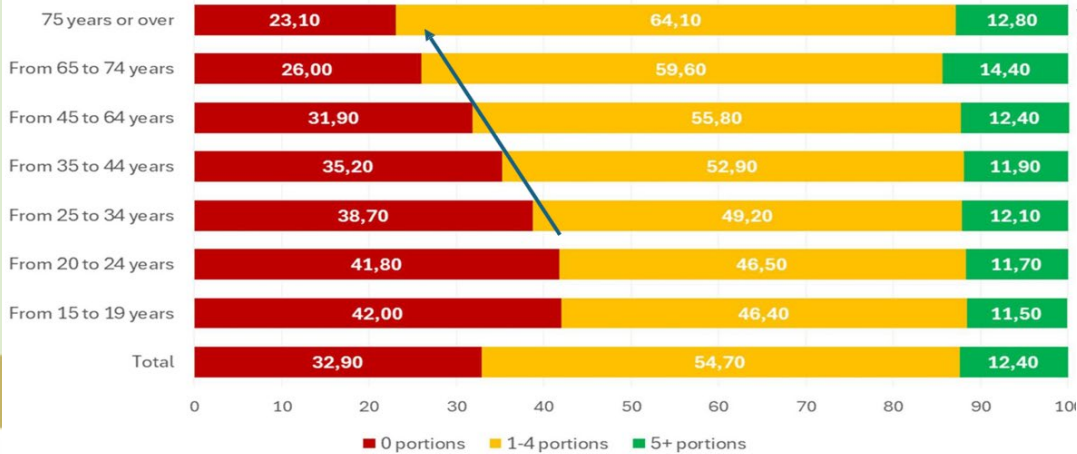
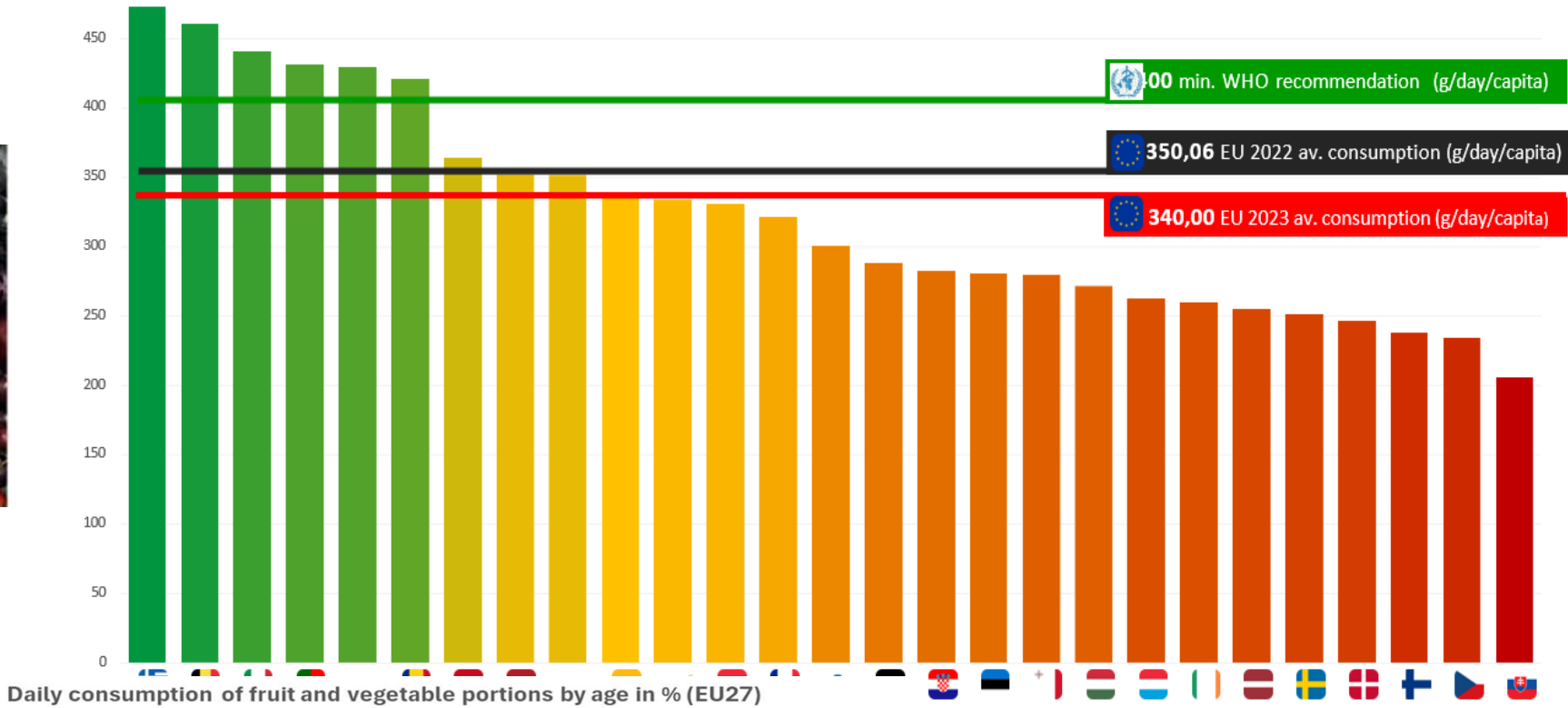
POLICY

- Limited CAP support (3% budget)
- Insufficient school scheme budget
- Promotion Policy under pressure
- No action under EU beating cancer plan
- Lack of positive discrimination for category part of solutions for GD &F2F
- Packaging discrimination limiting marketing
- No taxonomy recommendations yet

CONSUMPTION IS AT STAKE

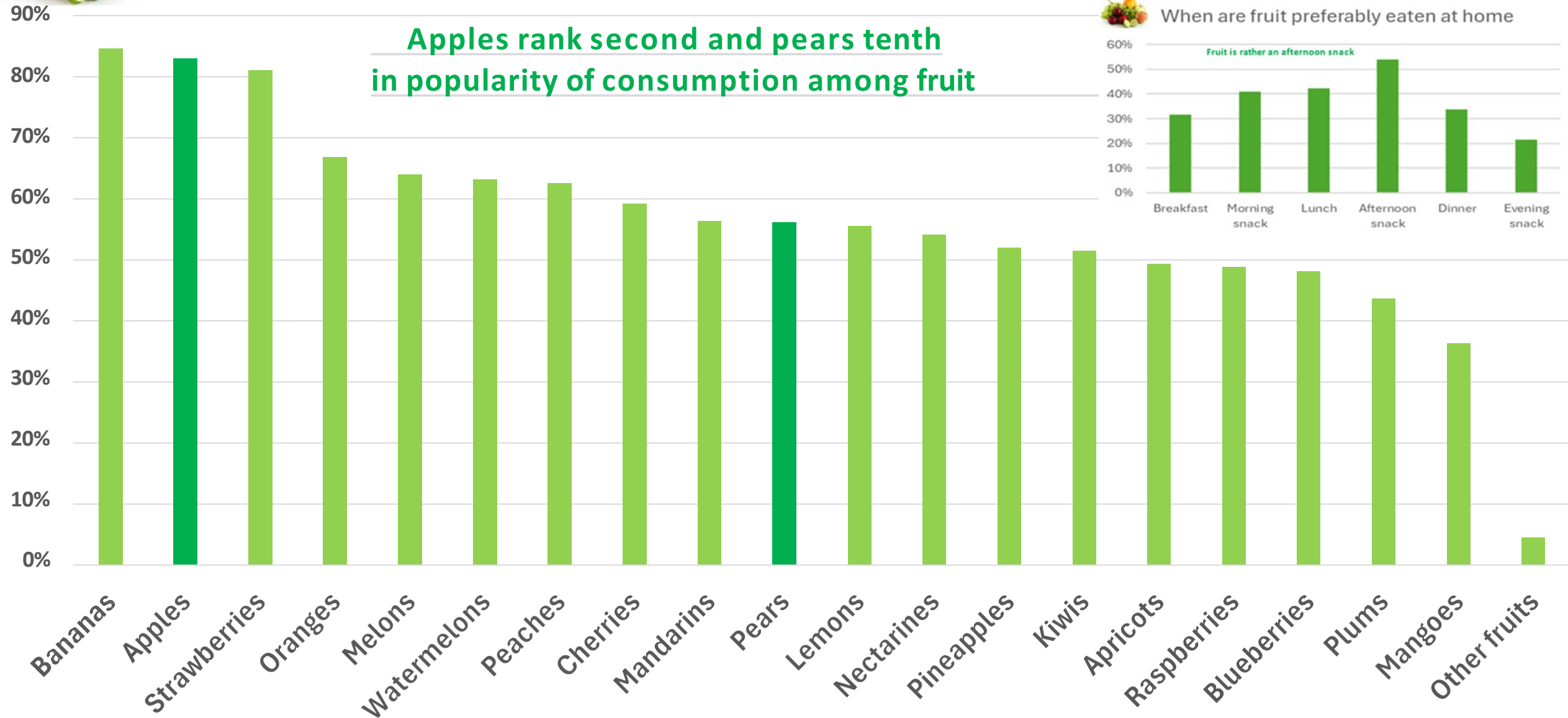


ec.europa.eu/eurostat

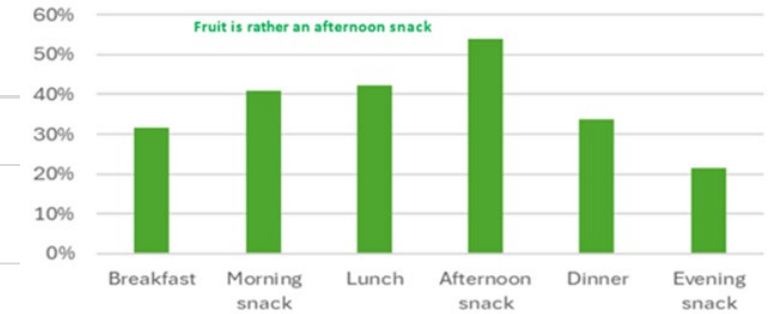




FRUIT PENETRATION RATE



When are fruit preferably eaten at home



CUÍDATE COMO TE CUIDAN LAS MANZANAS



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#1 jabłko DZIENNIE



CALIDAD
EUROPEA
AGRICULTURA
SOSTENIBLE

EL CUIDADO, EL AMOR Y LA EXPERIENCIA DE NUESTROS AGRICULTORES
DAN MEJORES FRUTOS

assomela ASSOCIAZIONE ITALIANA ASSOCIATION OF ITALIAN AGRICULTURAL PRODUCERS

LA UNIÓN EUROPEA RESPALDA LAS CAMPAÑAS QUE PROMUEVEN LA CALIDAD DE LOS PRODUCTOS AGRÍCOLAS

ENJOY IT'S FROM EUROPE

A HEALTHY MESSAGE FROM EUROPE

LIFE IS BETTER

with Fruit & Vegetables



EUROPEAN
APPLES:
Natural goodness
from the
Italian Alps



GOOD MOVE FROM EUROPE, SNACK SOME GOOD HABITS !



WAPA STUDY ON APPLES AND PEARS CONSUMPTION PATTERN



Conducted by WAPA for Prognosfruit with Discurv/Made in Vote

Focus on attitude, obstacles and motivation to consume apples and pears, competitors, timing of consumption and image

Focusing on selected countries (BE, DE, DK, ES, FR, HU, IT, PL, UK) with 7000 opinions (500 to 1.000 respondents by countries)

Response by countries and aggregate from an EU perspective

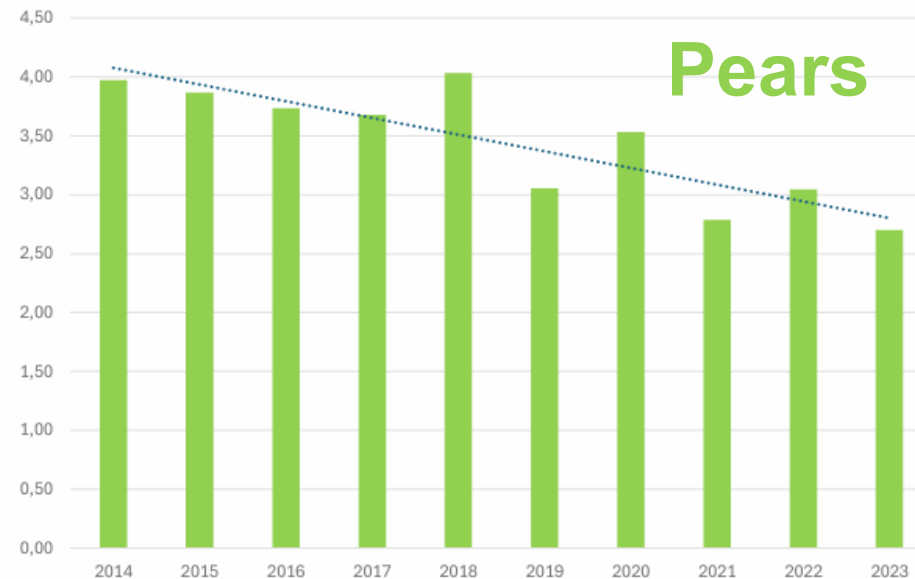
Specification of responses by criteria (gender, age, place of living, family structure,...)

Study to be accessible at a cost with country folders and aggregate consolidated data

CONSUMPTION TRENDS FOR APPLES AND PEARS

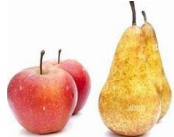


- Consumption is mainly supply driven
- Large variation between Member States
- More competition inside a declining fruit basket
- Increase competition from agrofood alternative

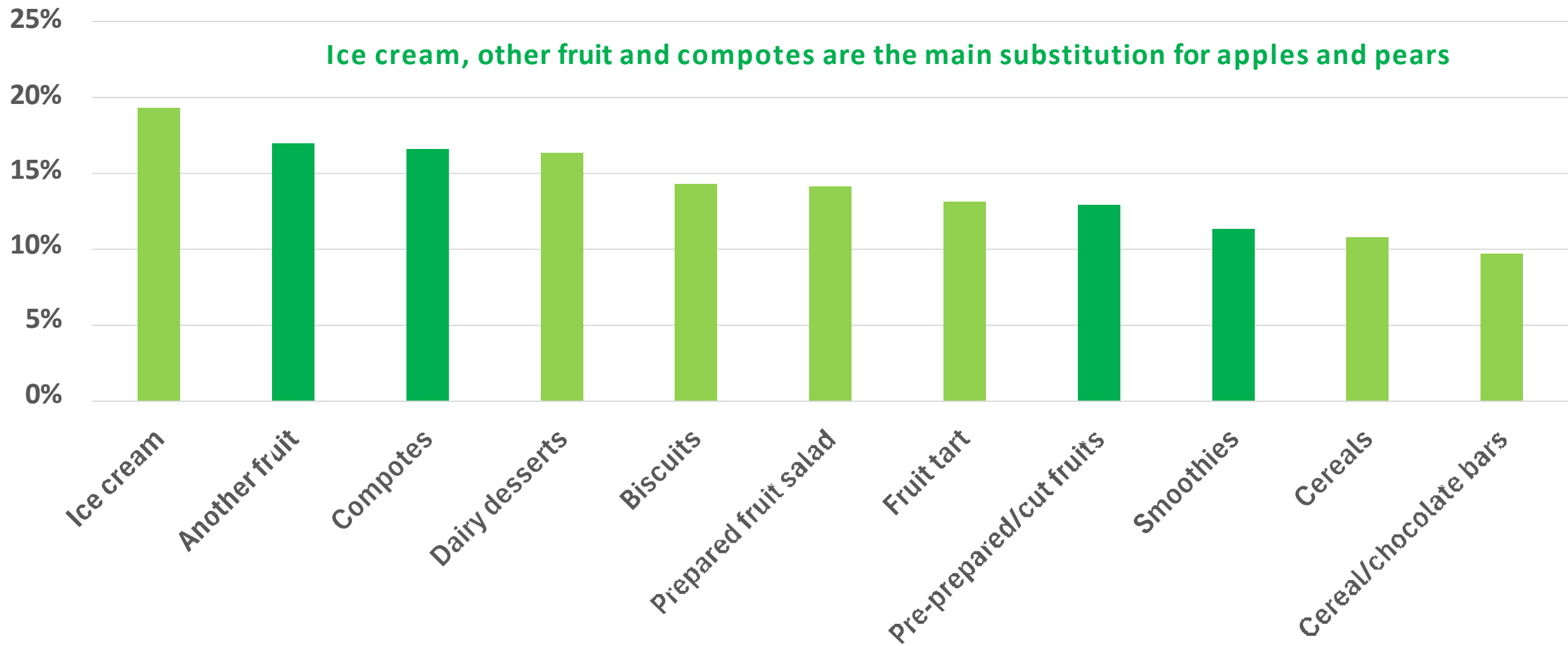


Where do you consume ...?





SUBSTITUTION TO APPLES AND PEARS WHEN NOT CONSUME

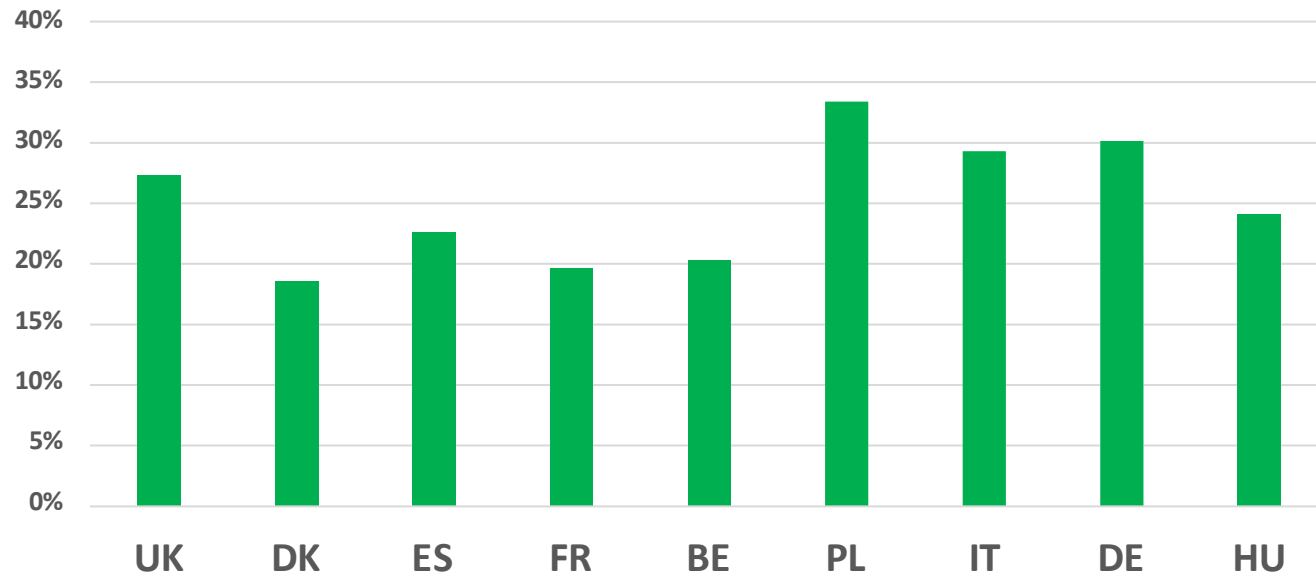




FREQUENCY OF APPLES CONSUMPTION

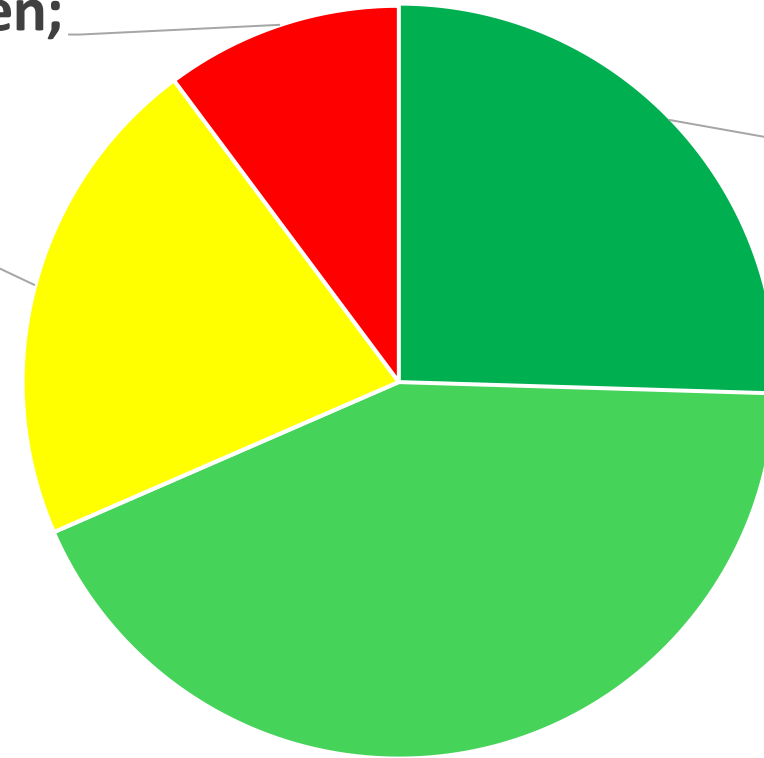
1 out of 4 consumers declare to eat regularly apples , Poland being with the highest rate followed by DE and IT

Eating apples every day or almost



Less often;
10%

1 to 2 times a
month; 21%

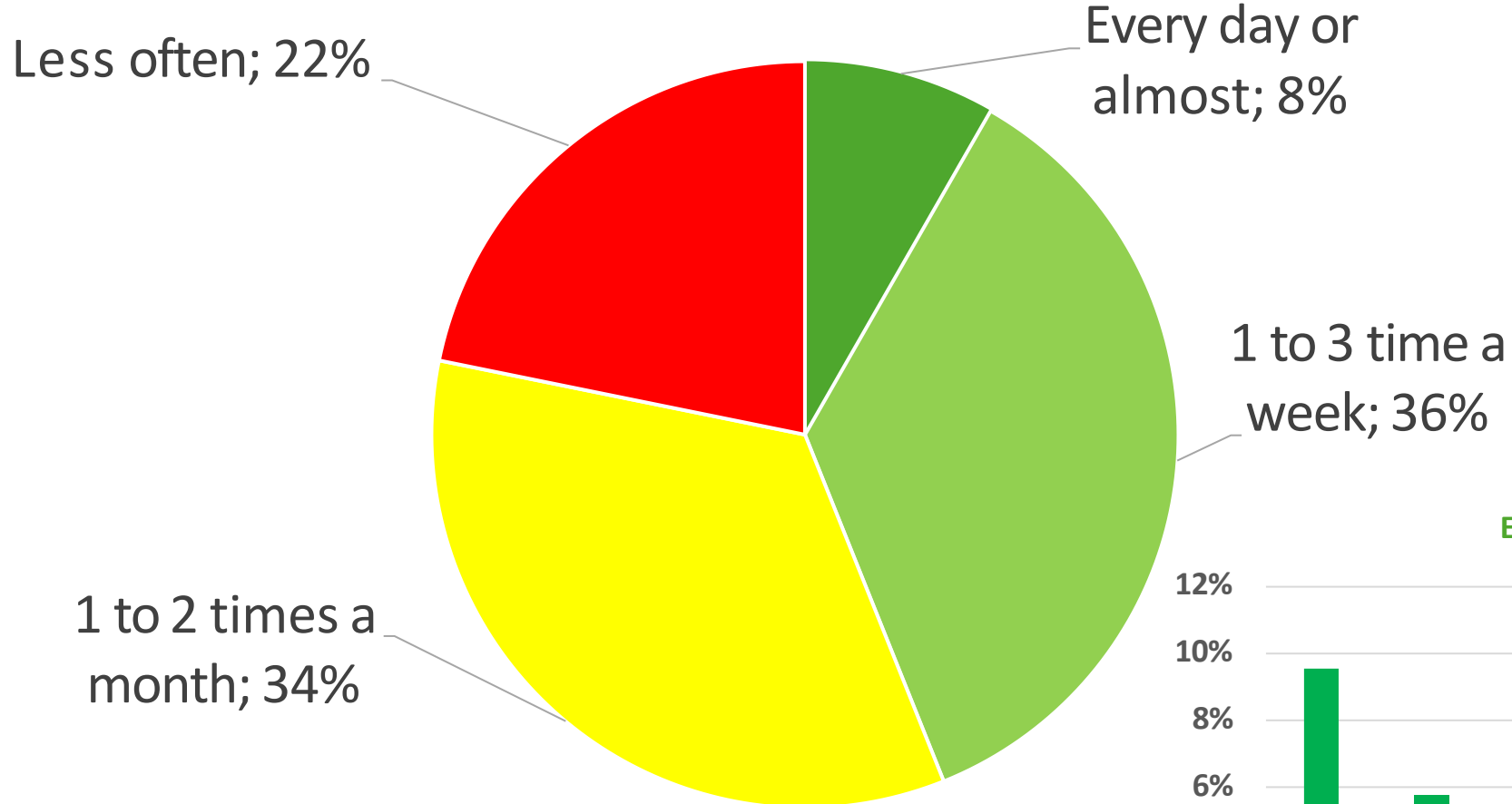


Every day or
almost; 25%

1 to 3 time a
week; 43%



FREQUENCY OF PEARS CONSUMPTION

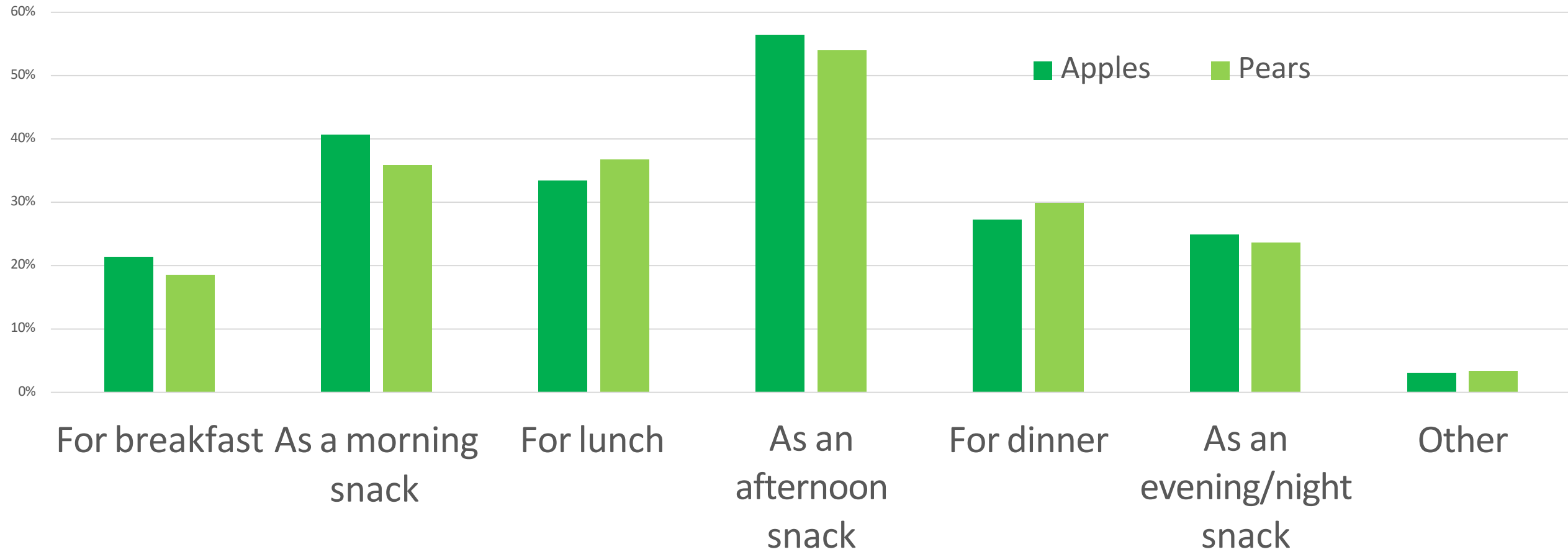


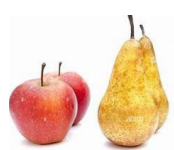
Only 8% of consumers declare to eat regularly apples, SPAIN being with the highest rate followed by UK and IT



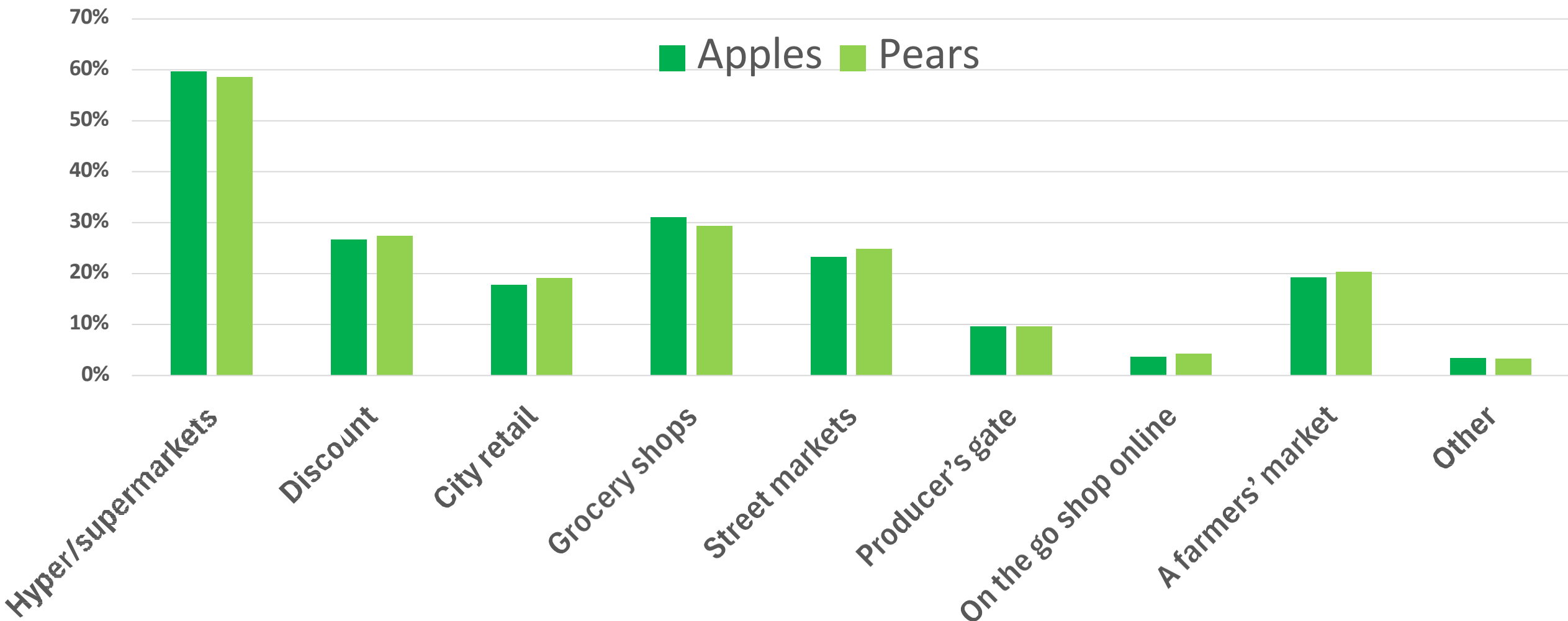


MOMENTS TO EAT



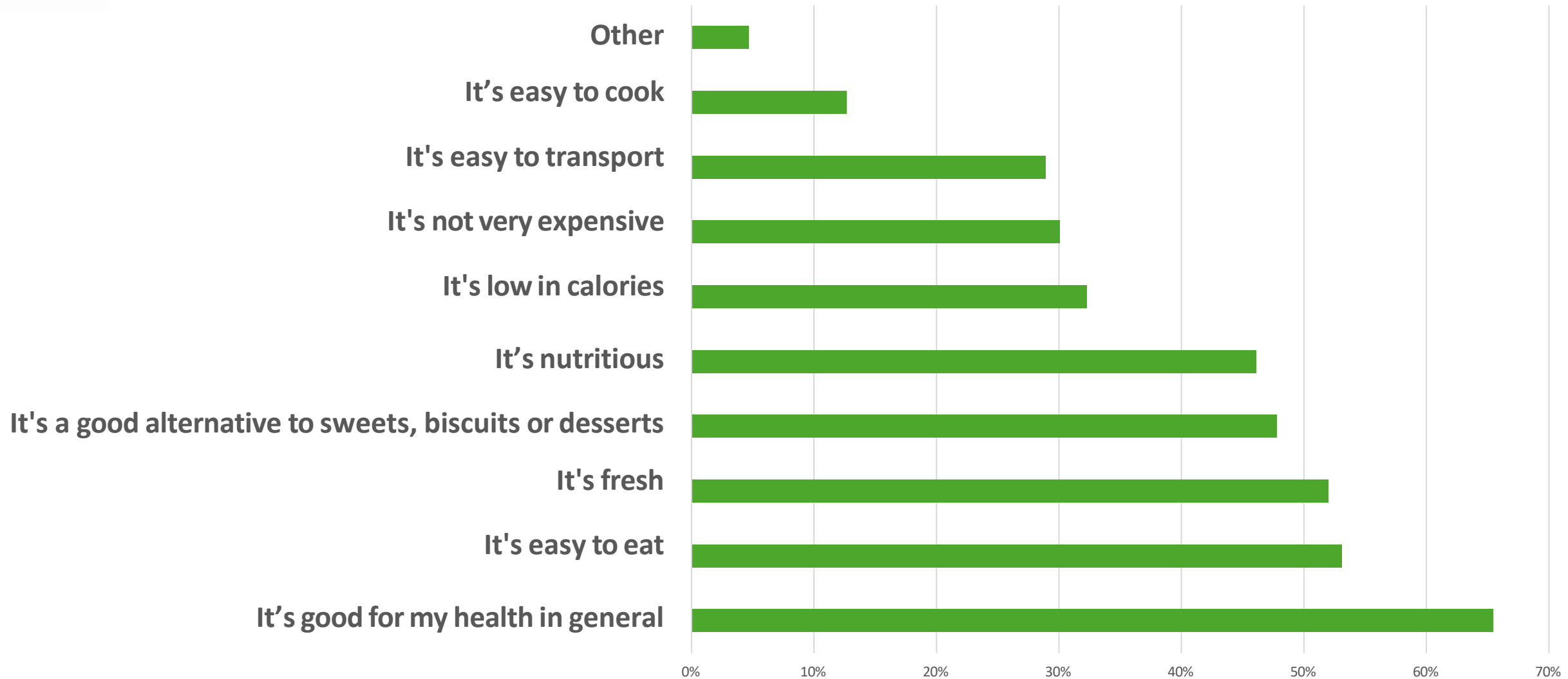


PURCHASE PLACES



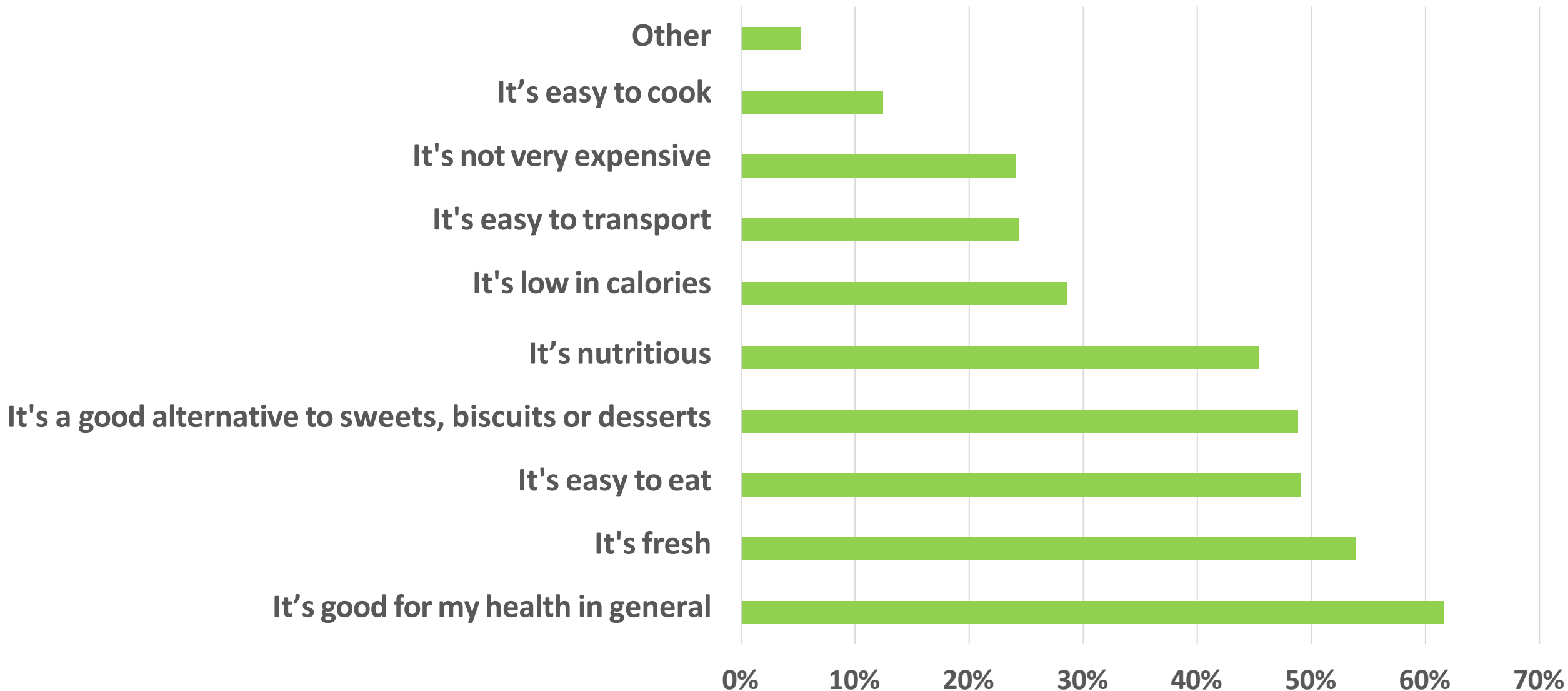


REASONS TO EAT APPLES





REASONS TO EAT PEARS



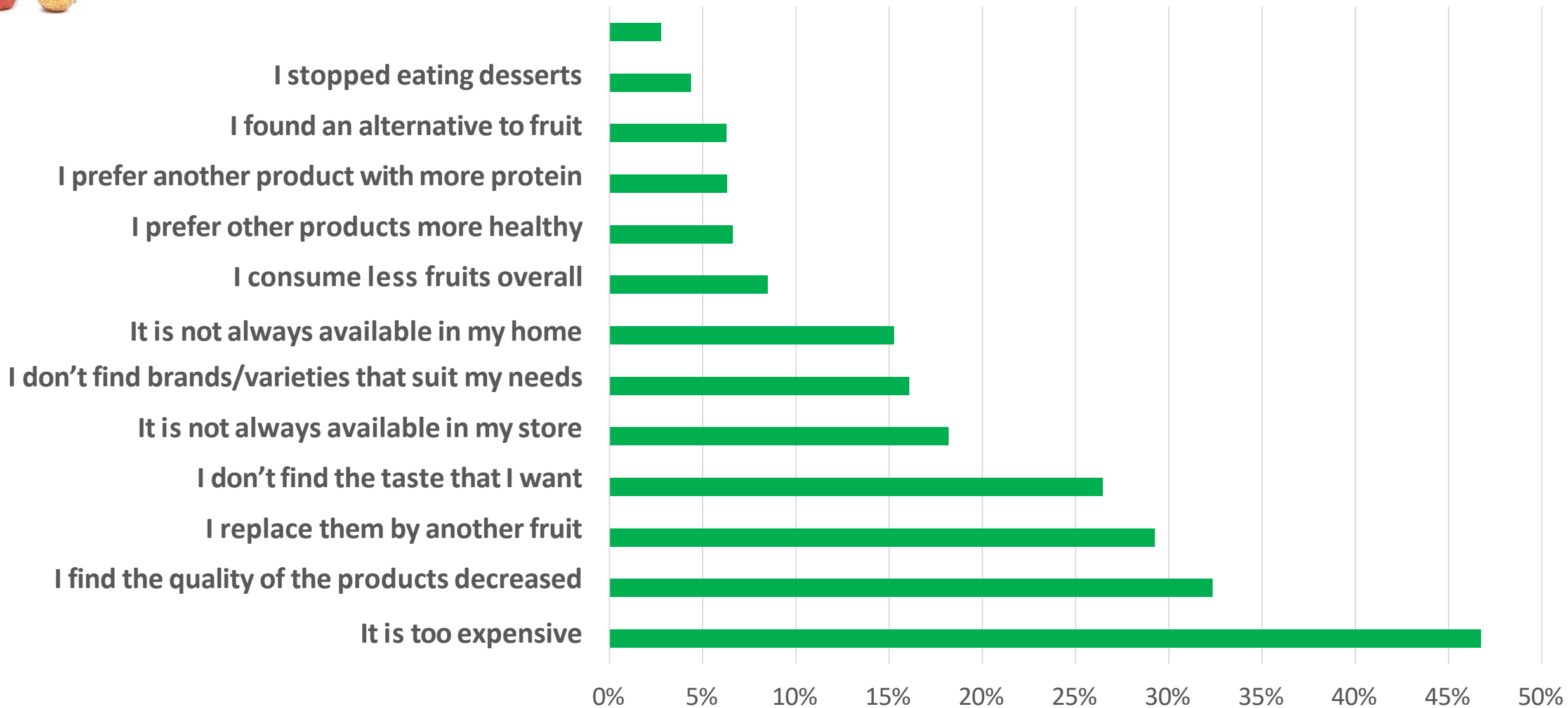


POSITIVES FACTORS TO BUY APPLES & PEARS



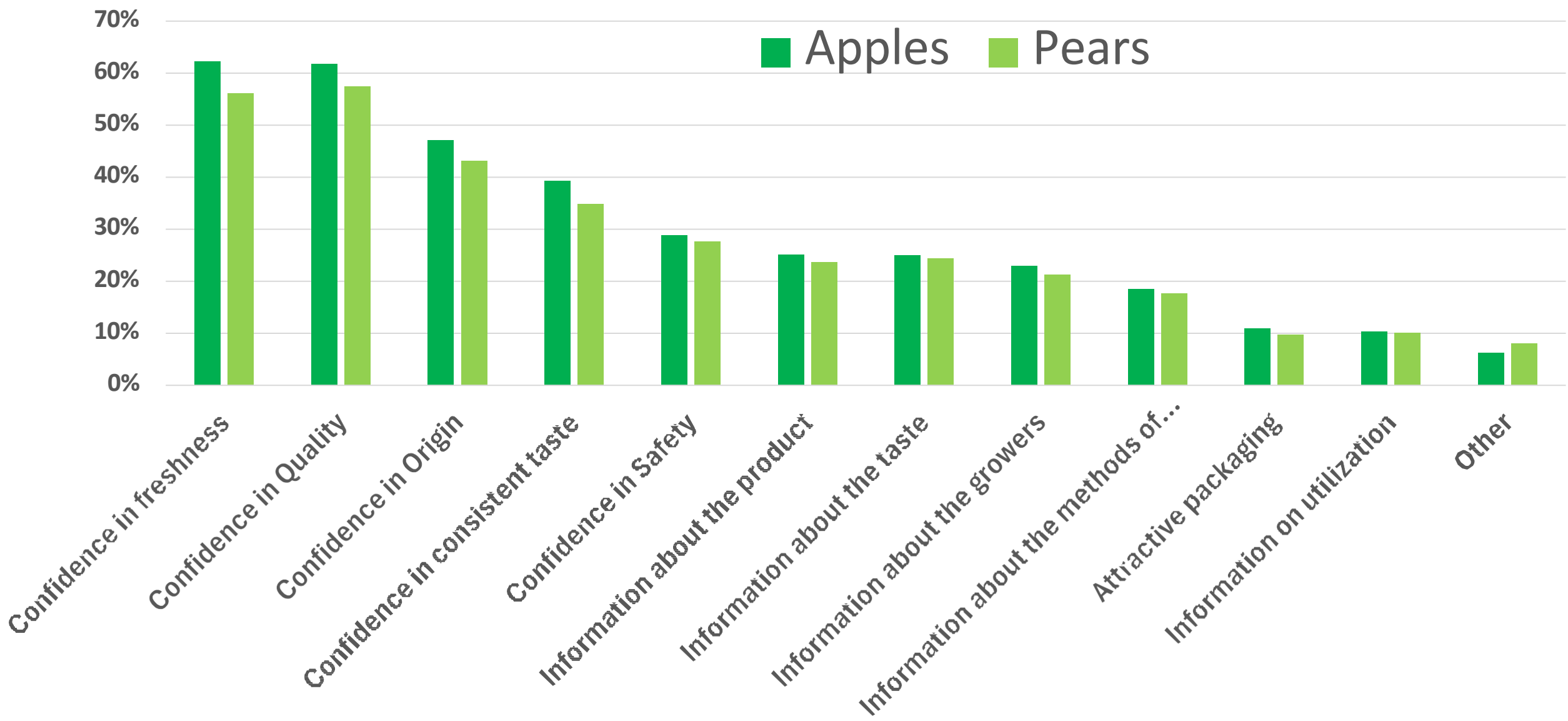


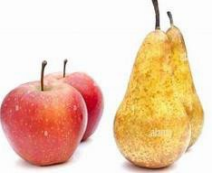
NEGATIVES FACTORS IMPACTNG PURCHASES





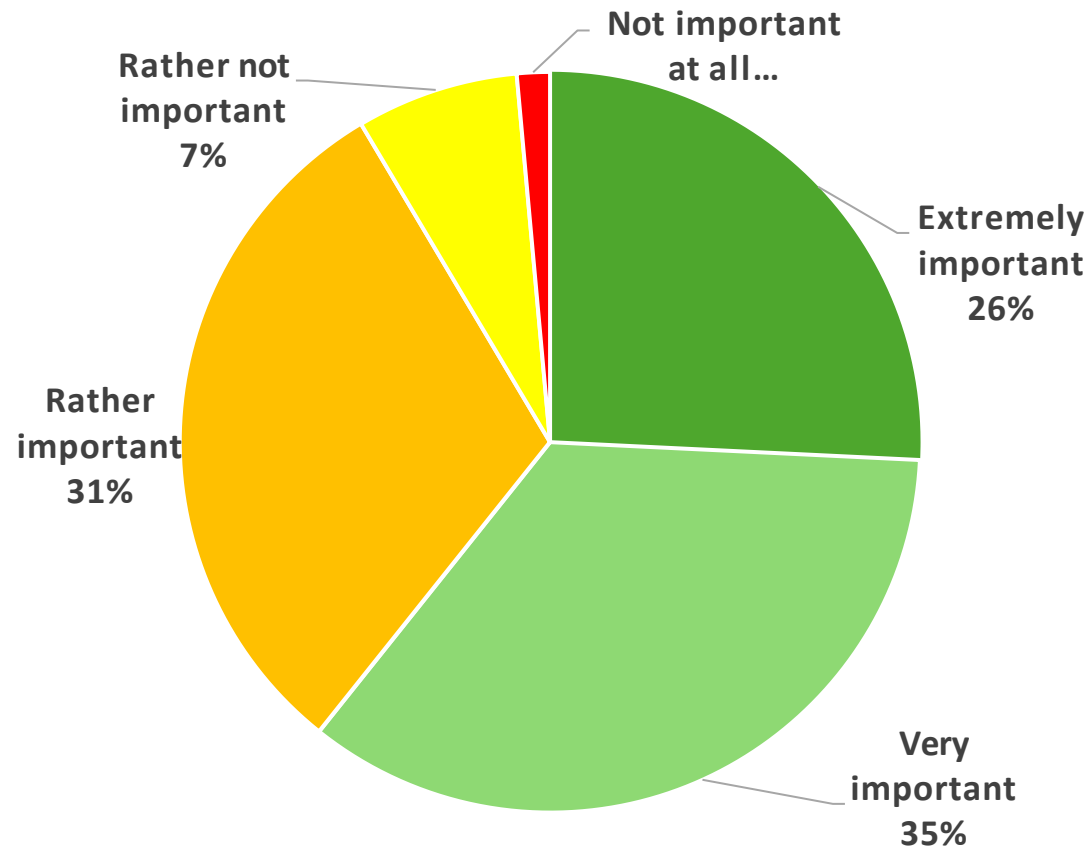
EXPECTATIONS FROM BRANDS



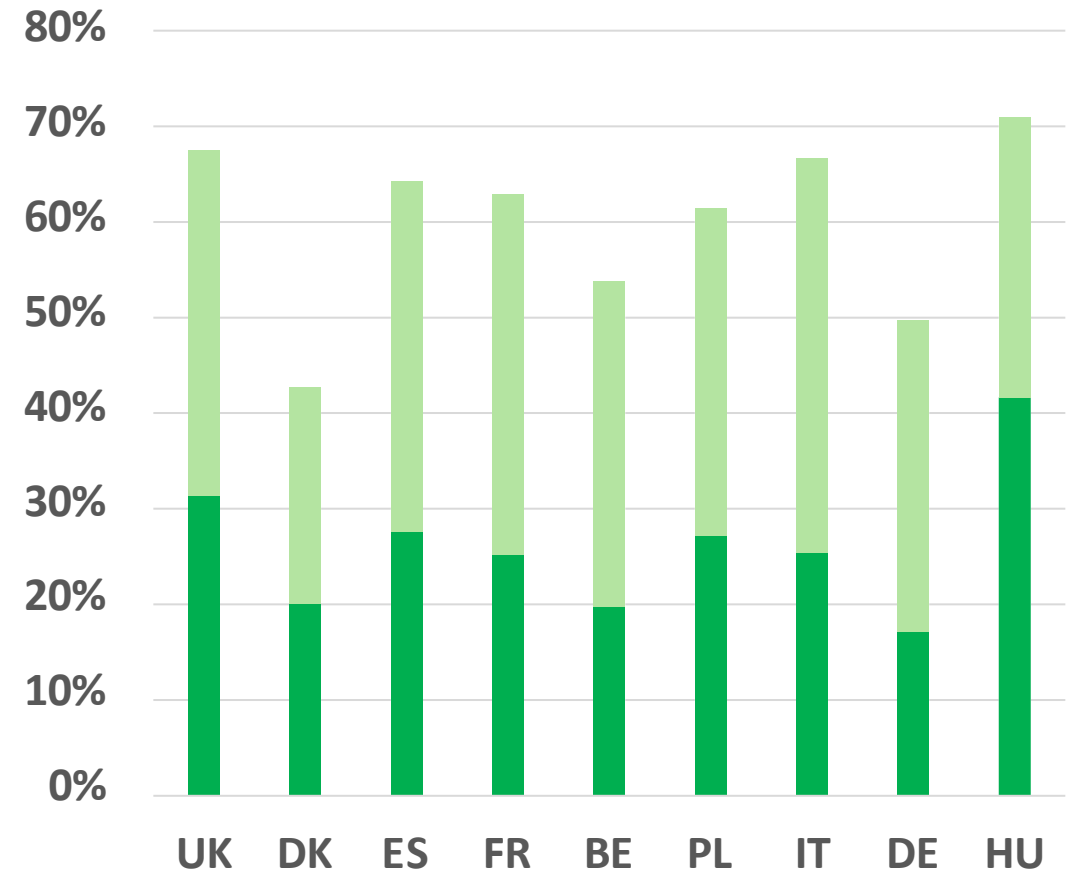


RELEVANCE OF PRICES

Aggregate results



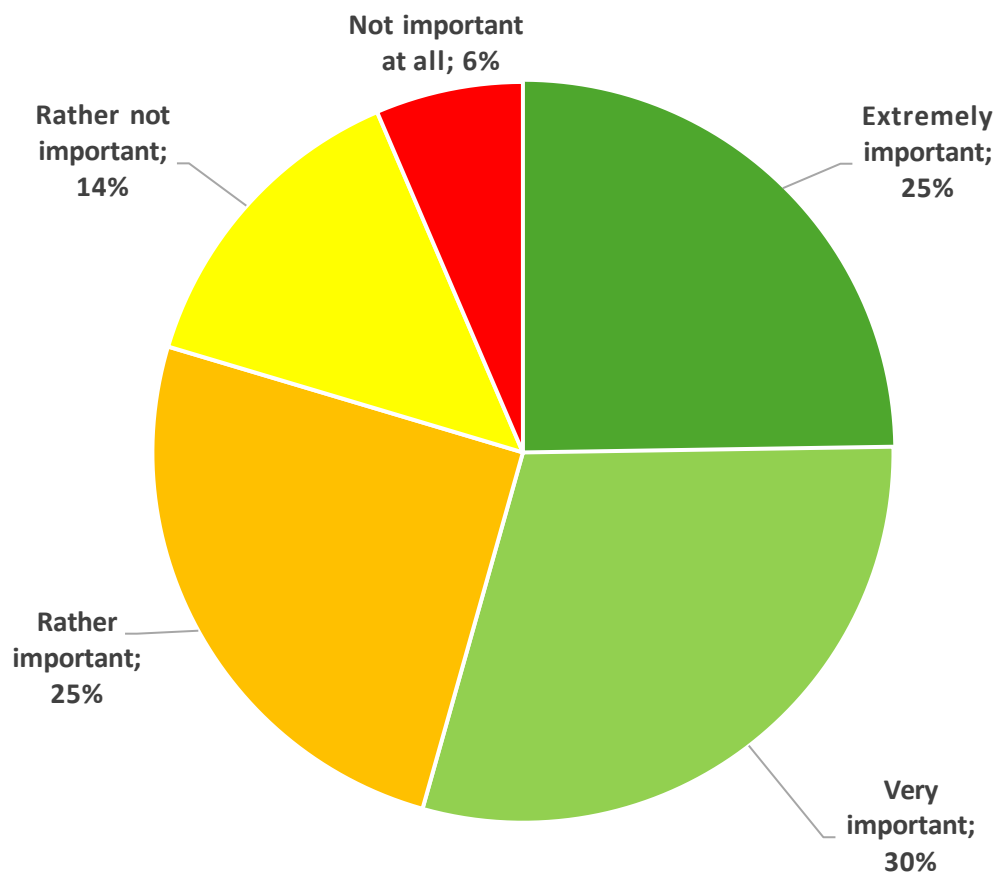
Comparative results Extremely or very important



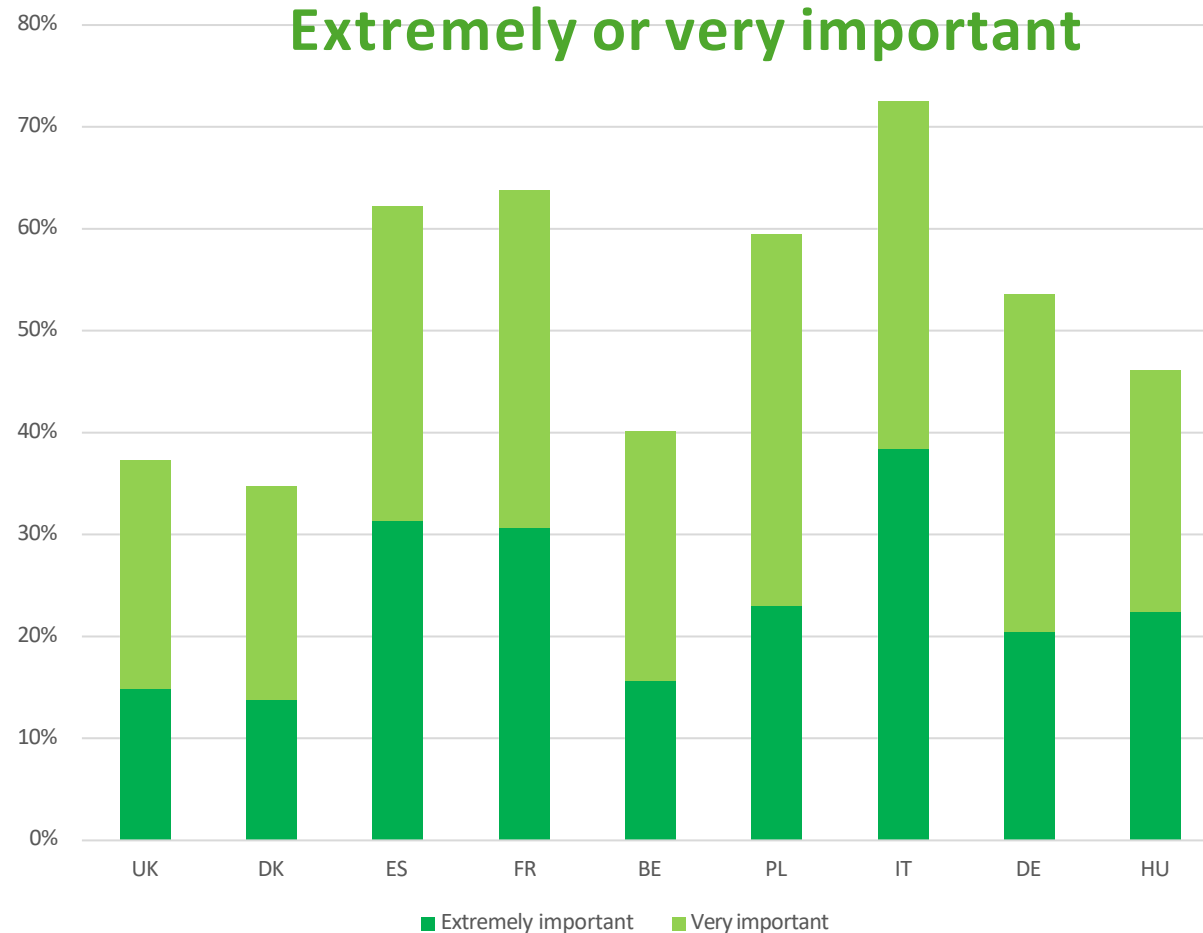


RELEVANCE OF NATIONAL ORIGIN

Aggregate results



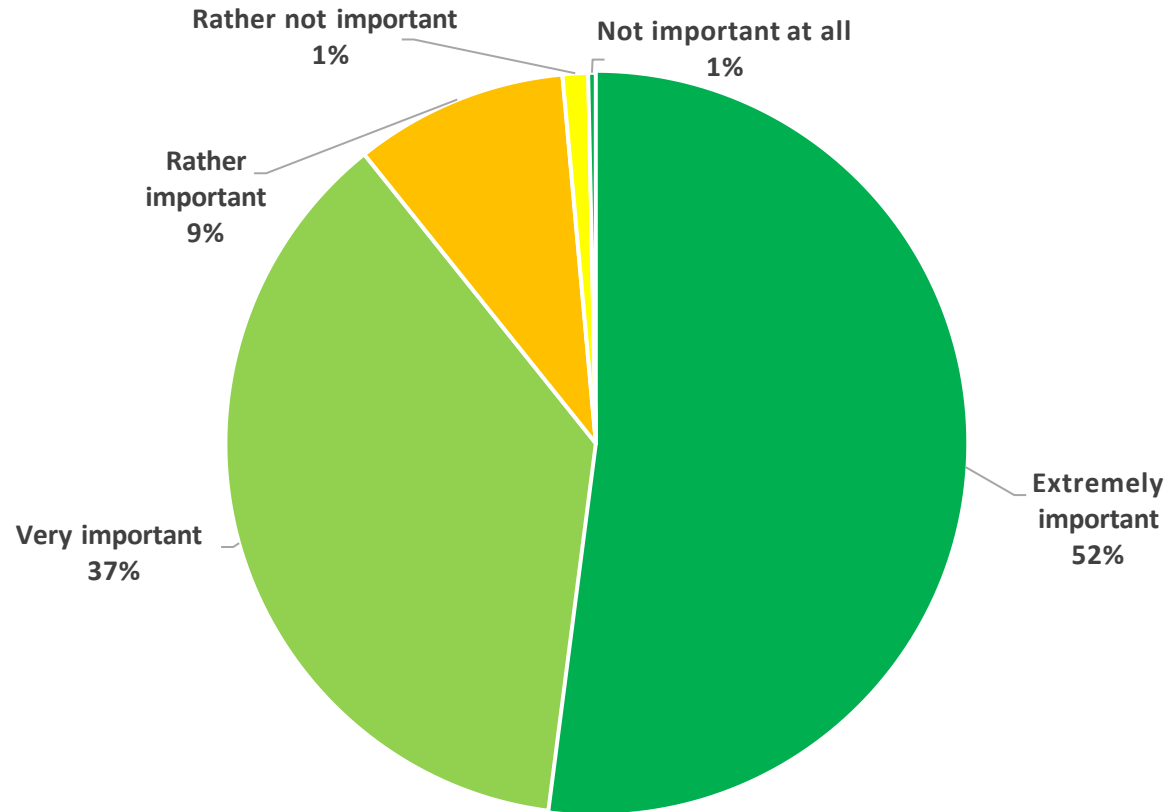
Comparative results Extremely or very important



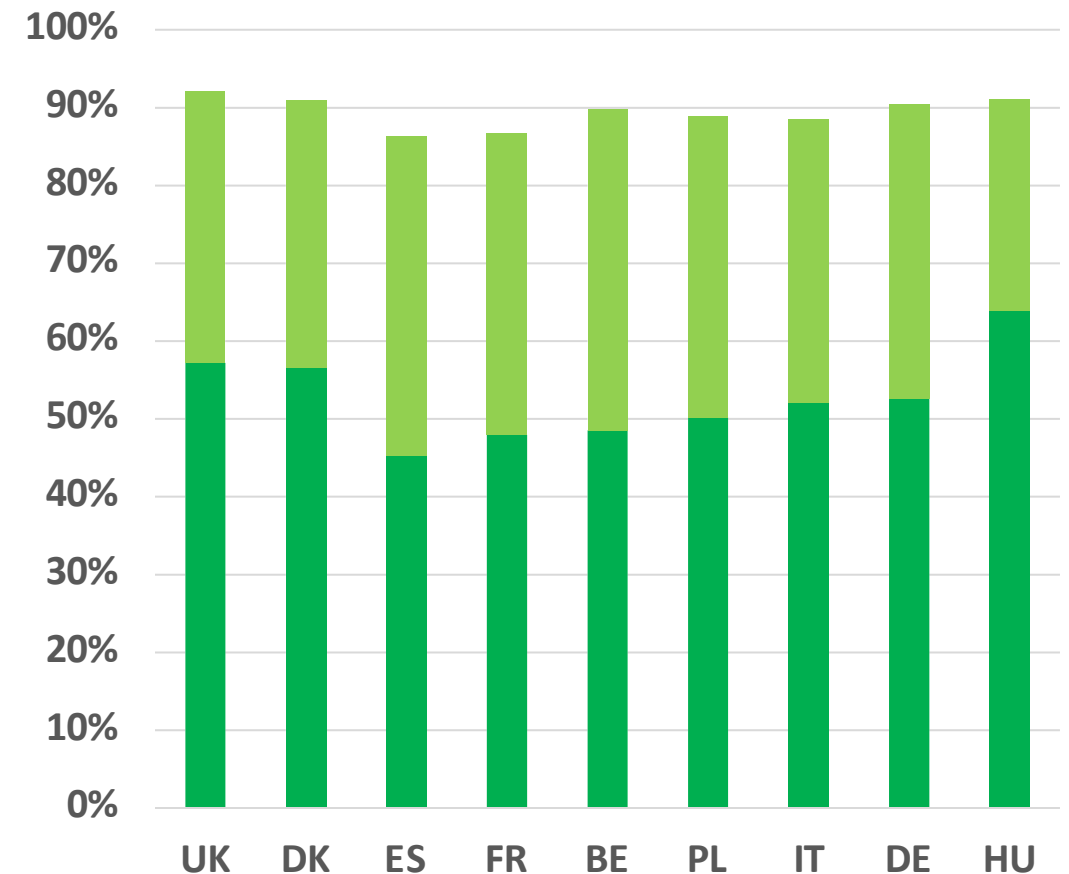


RELEVANCE OF TASTE

Aggregate results



Comparative results Extremely or very important



MANY THANKS