

Germany's Apple and Pear Market: Facts and Insights

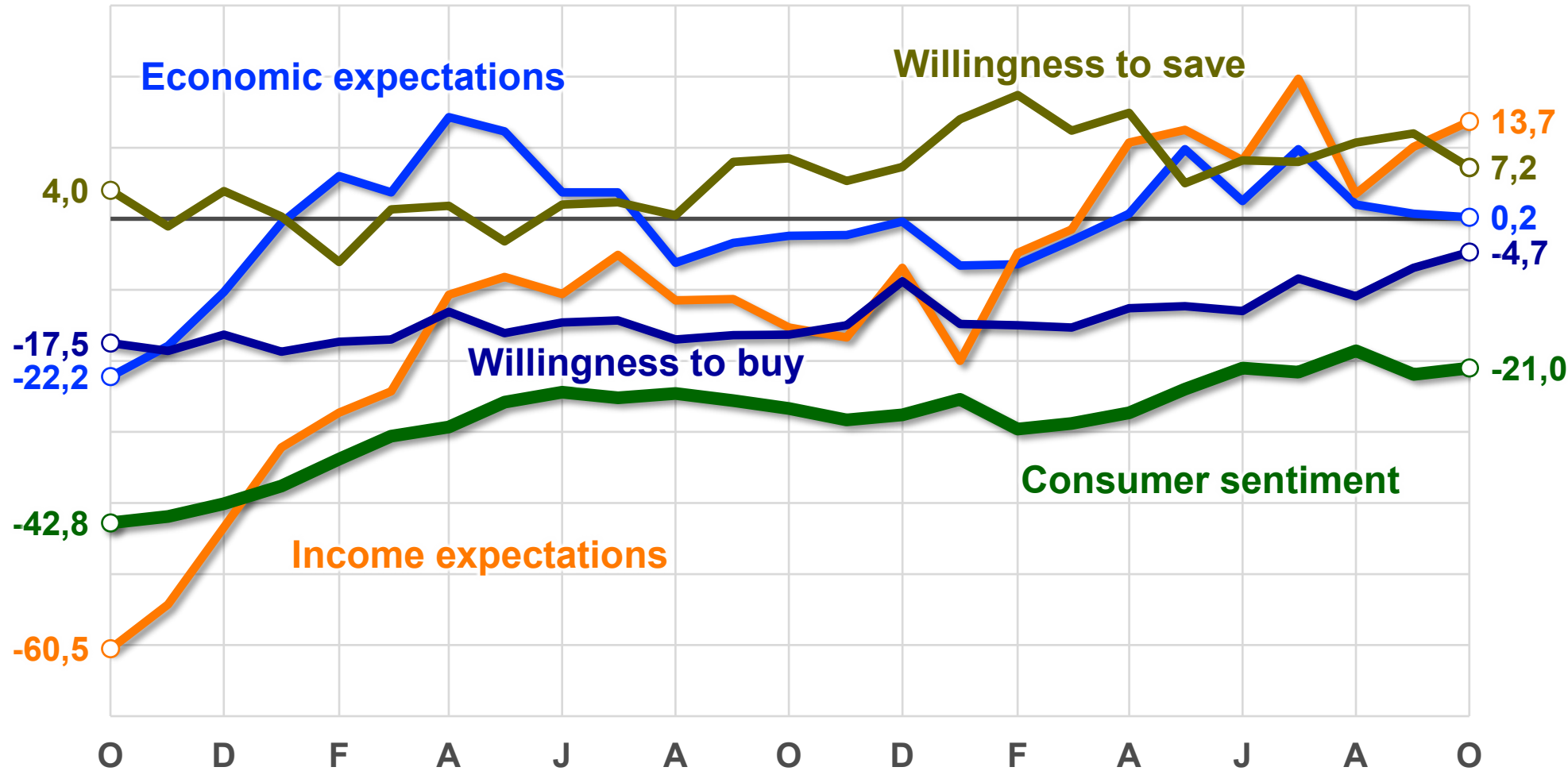
PIP FRUIT" MARKET OBSERVATORY MEETING
5TH NOVEMBER 2024
(AMI GMBH)



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Consumer sentiment continues its recovery

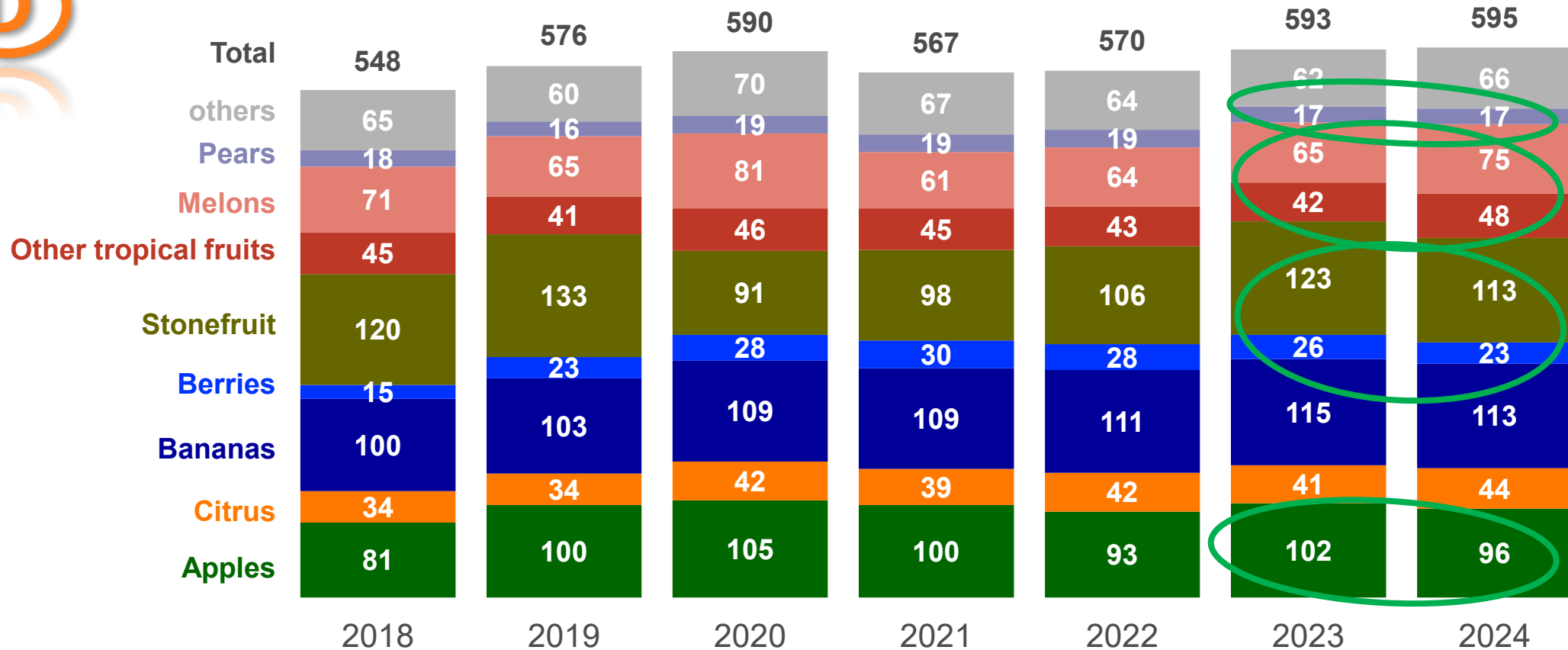
GfK consumer study for Germany, October 2022 to October 2024, in indicator points



How are the sales of fruit performing?

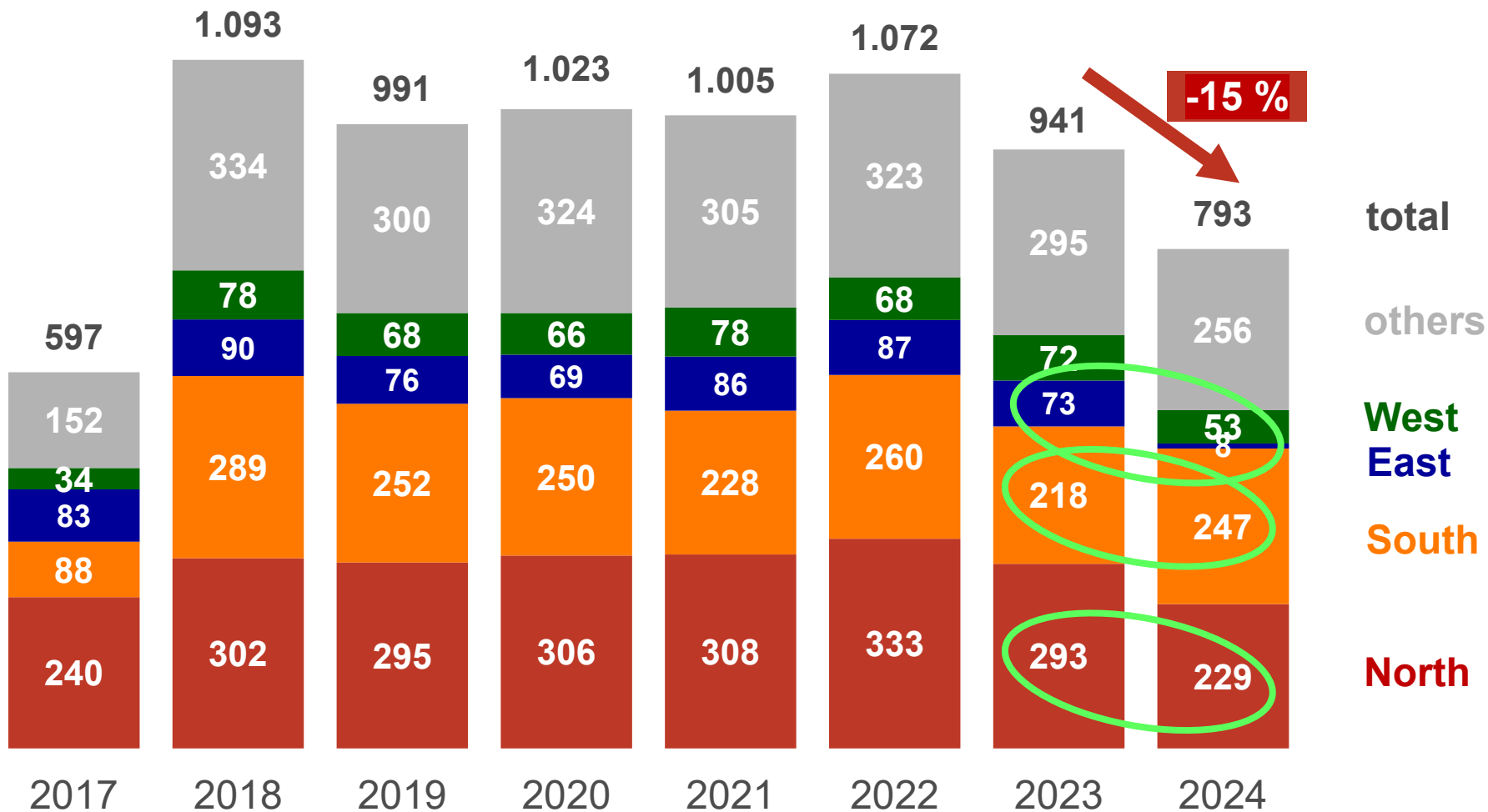
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Fruit purchases by German households, August to September, in 1,000 tons



Fewer apples than for a long time

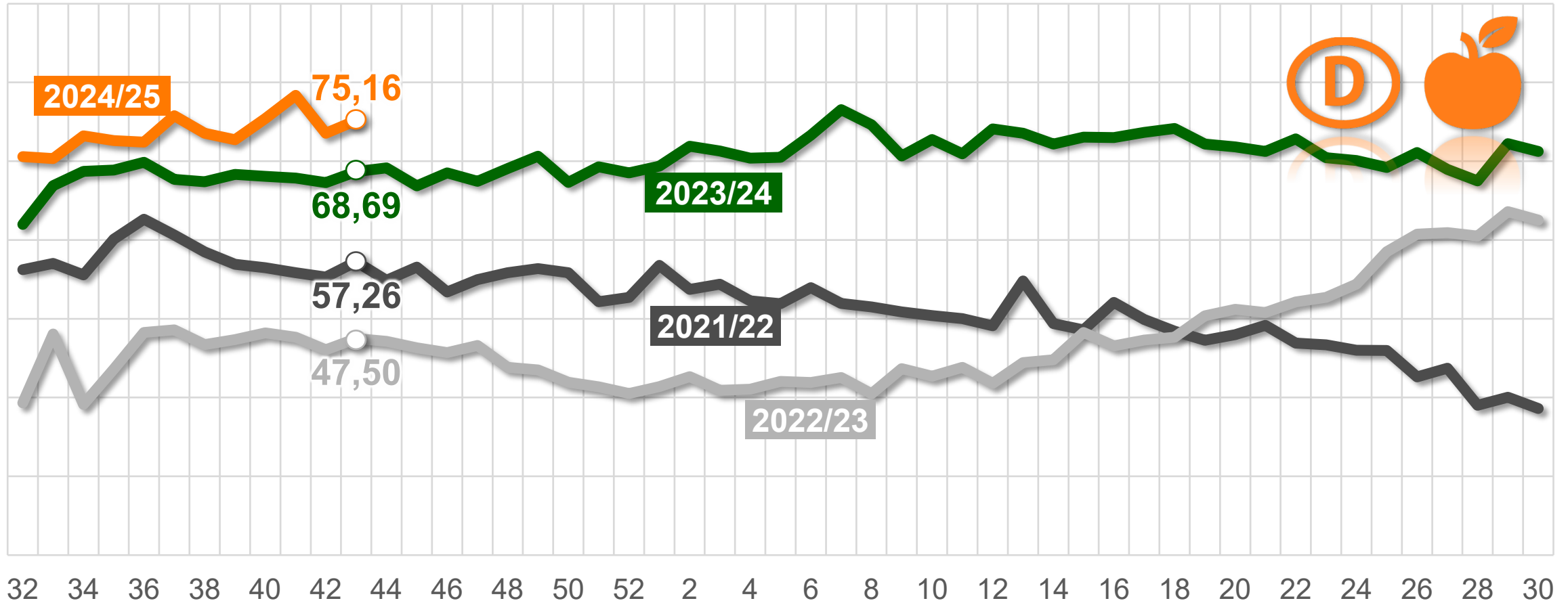
German apple crop, in 1,000 tons



Strong increasing prices



Price development of the producer organisations on Lake Constance/Lower Elbe, total apples, class I dessert apples, in EUR/100 kg

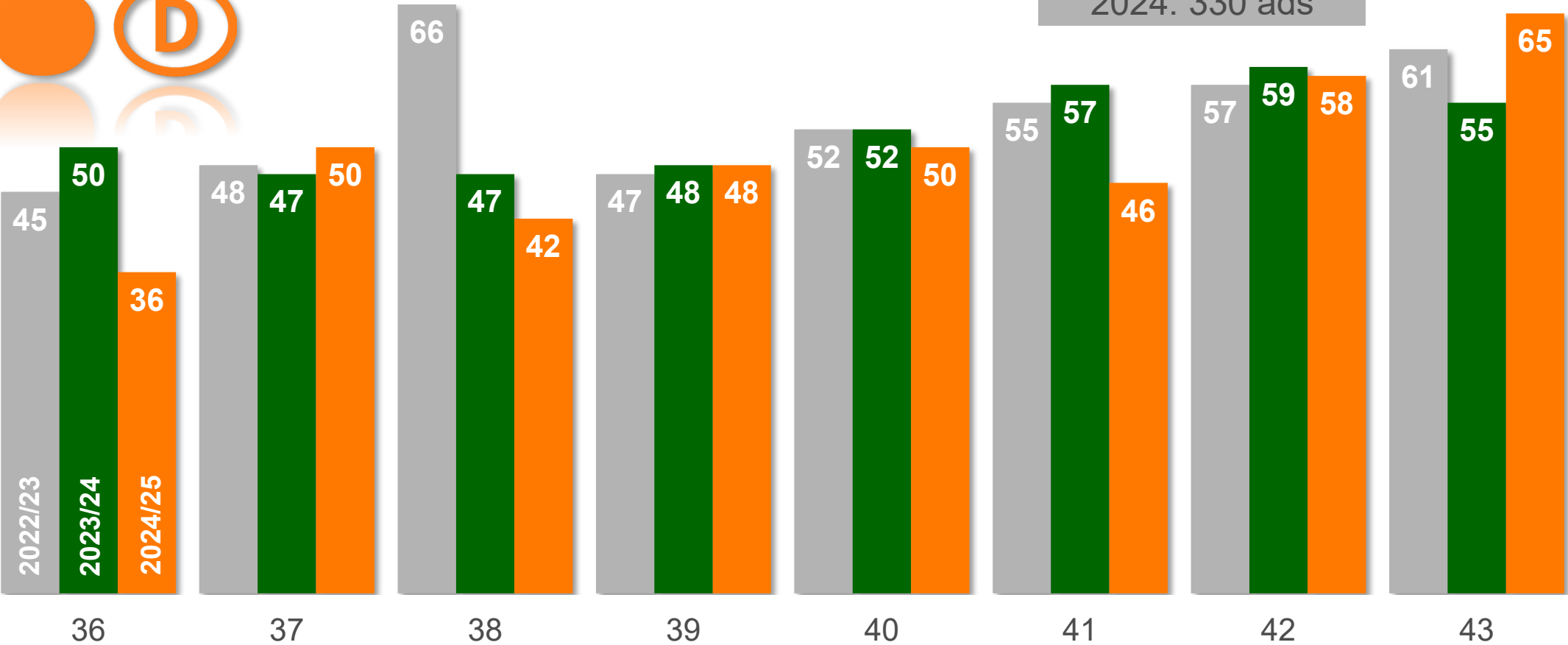


Less advertising until Mid-October

Number of apple advertisements per week



Week 36-42
2022: 370 ads
2023: 360 ads
2024: 330 ads

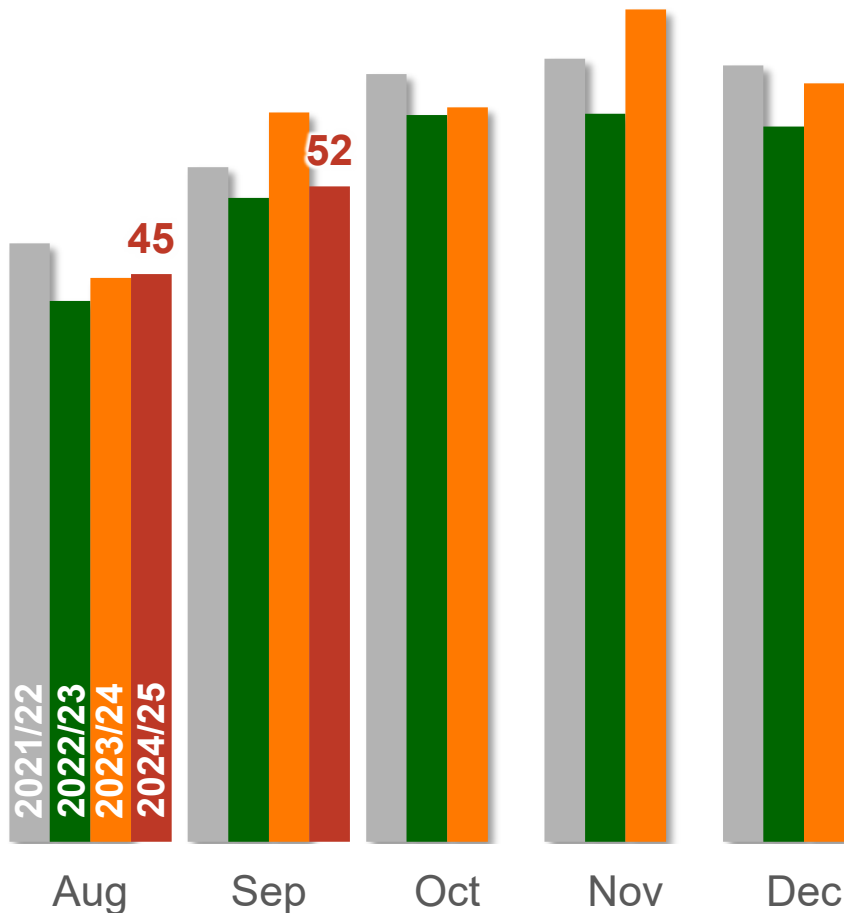


Less volumes, less sales

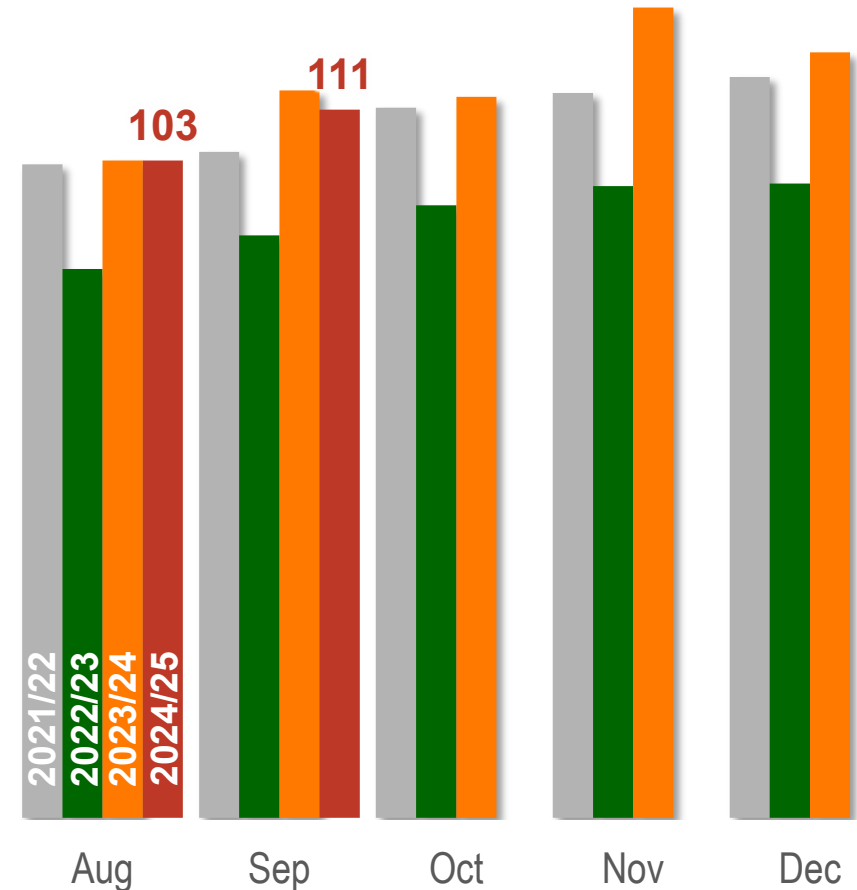


Apple purchases and sales by private households by month in Germany,
purchase volume in 1,000 tons and turnover in Mio. EUR

Purchases



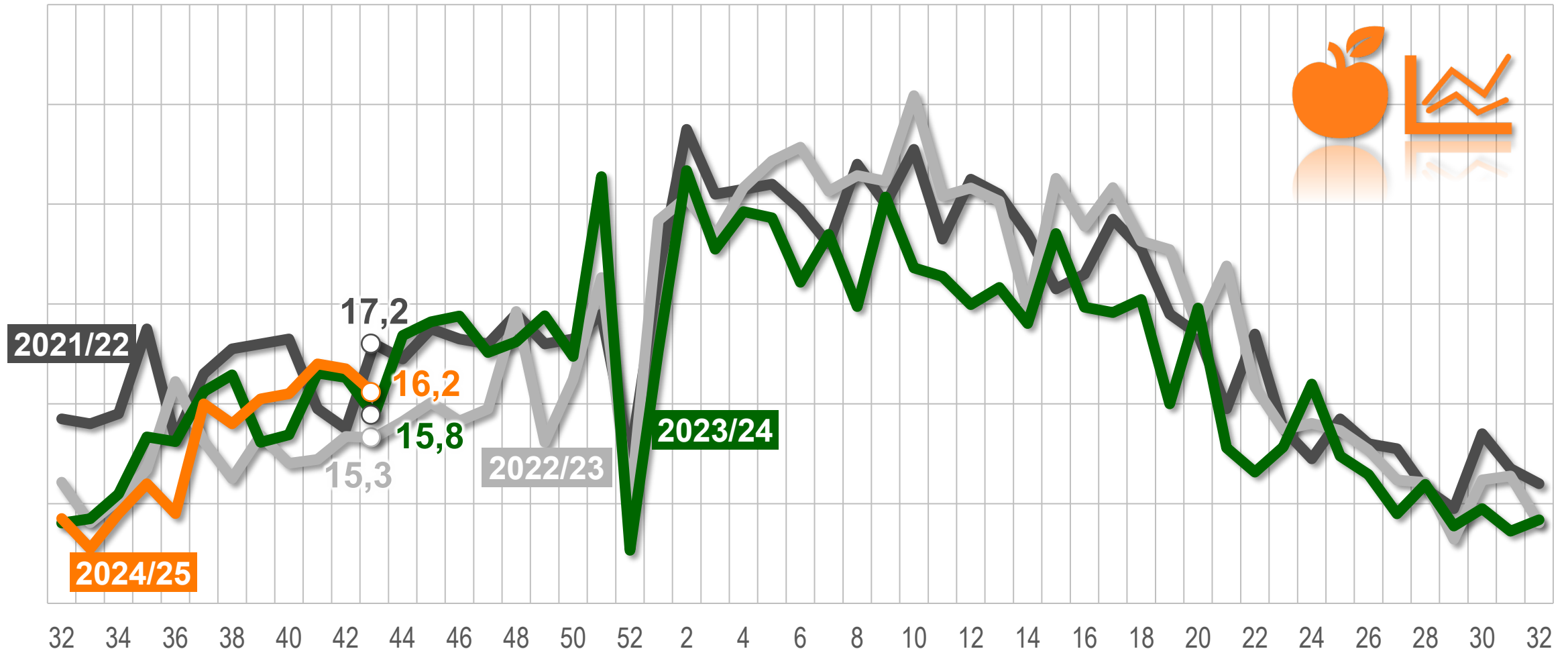
Turnover



Apples are often purchased

Weekly market penetration of apples in German retail, in %

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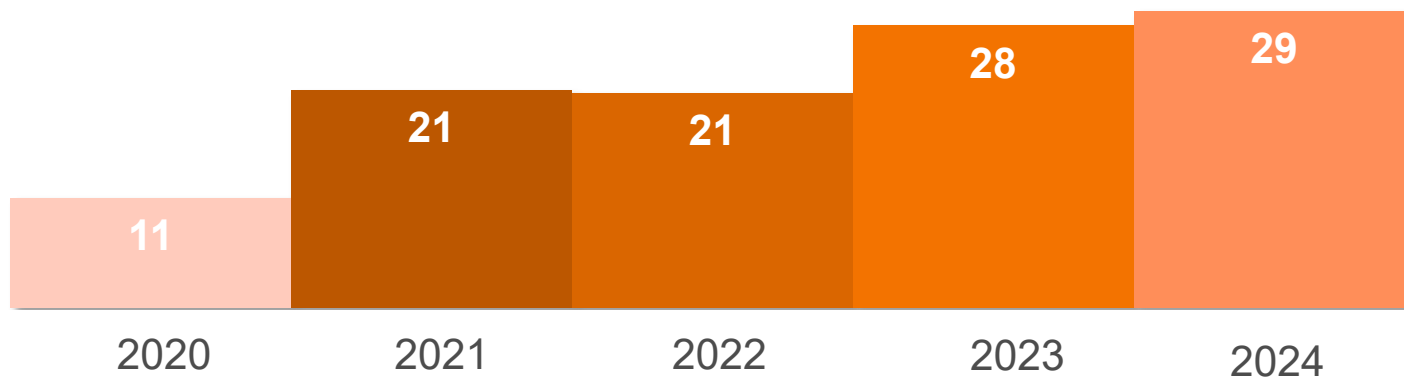


6er Foodtainer on the rise

AMI store check in German retail, supply by packaging unit in week 36-43, in %



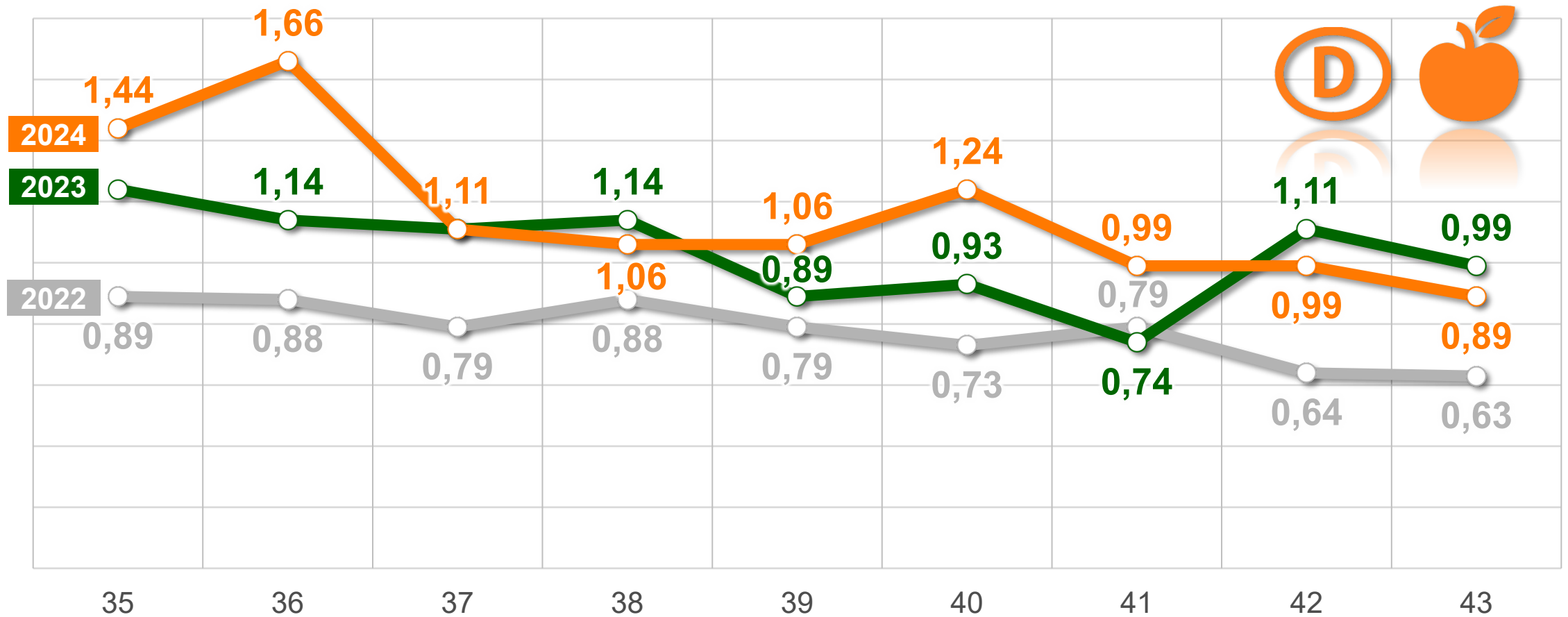
6er Foodtainer



... resulting in firmer prices on average

Minimum promotional prices in EUR/kg in German food retail

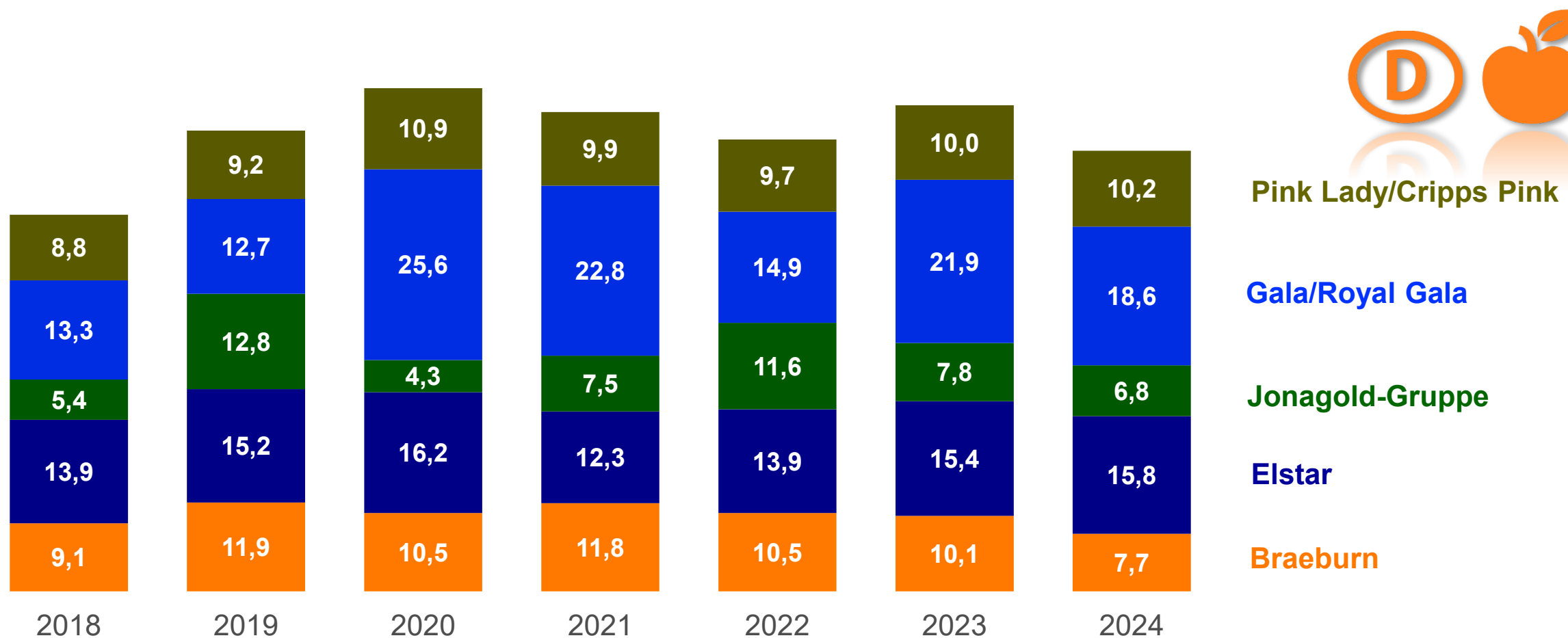
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Elstar further on the rise, Gala failed



Purchase volumes of apples by private German households in food retail, August-September, in %

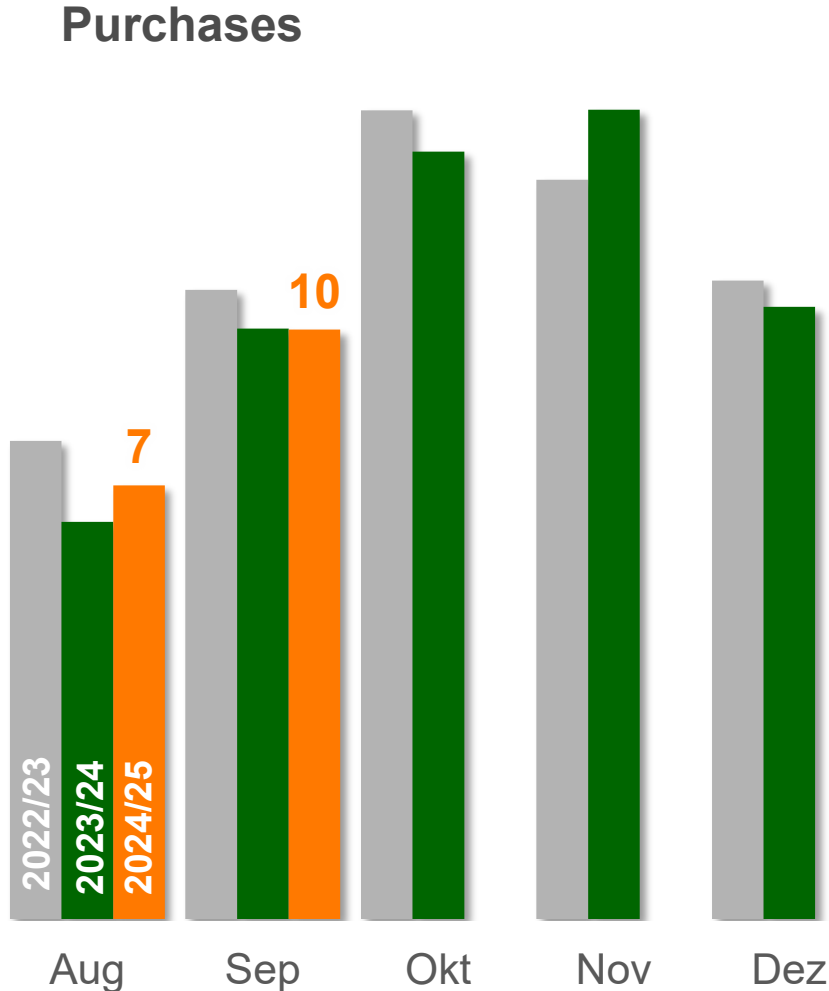


Season off to a good start, but now comes the critical phase

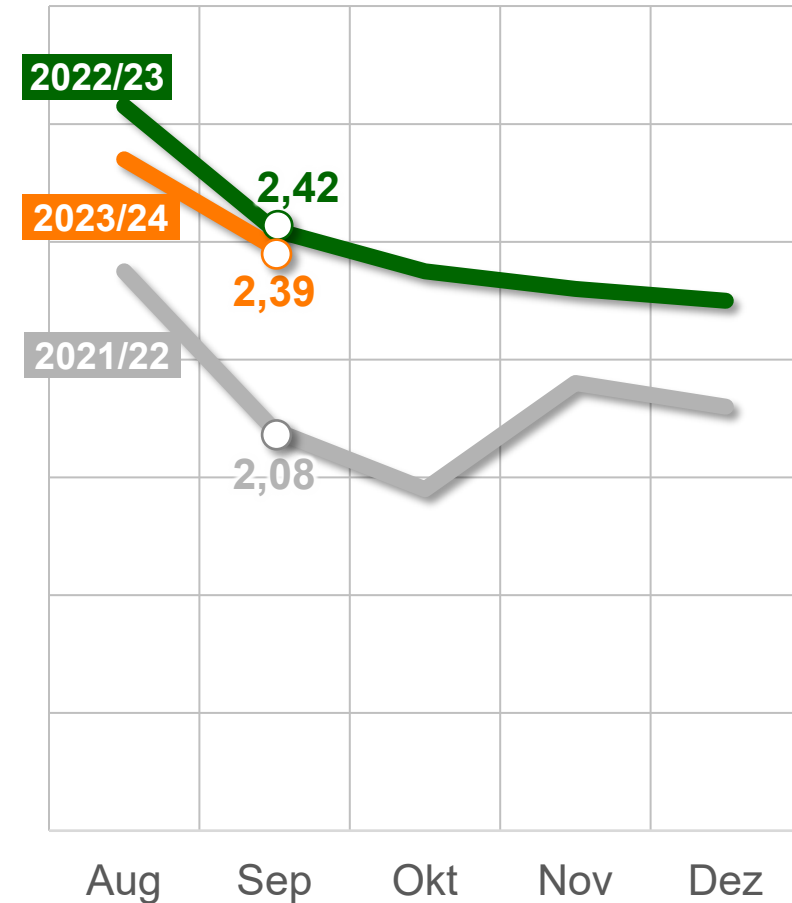


Pear purchases by private households by month in Germany, purchase volume in 1,000 tons and prices in EUR/kg

Purchases



Prices



Let's hope for a good season!



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