



TRENDS IN SALES OF FRUITS AND VEGETABLE PRODUCTS – A RETAIL PERSPECTIVE

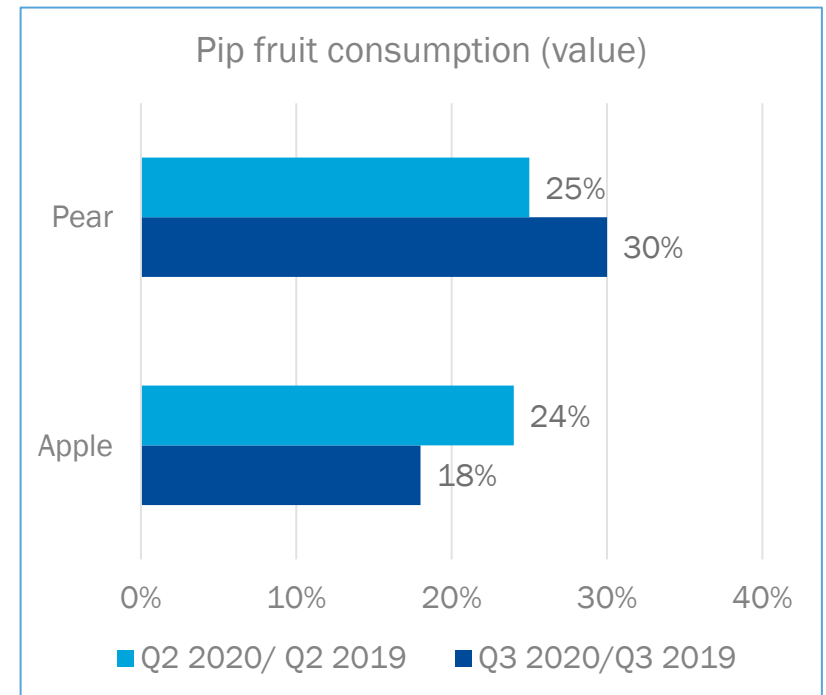
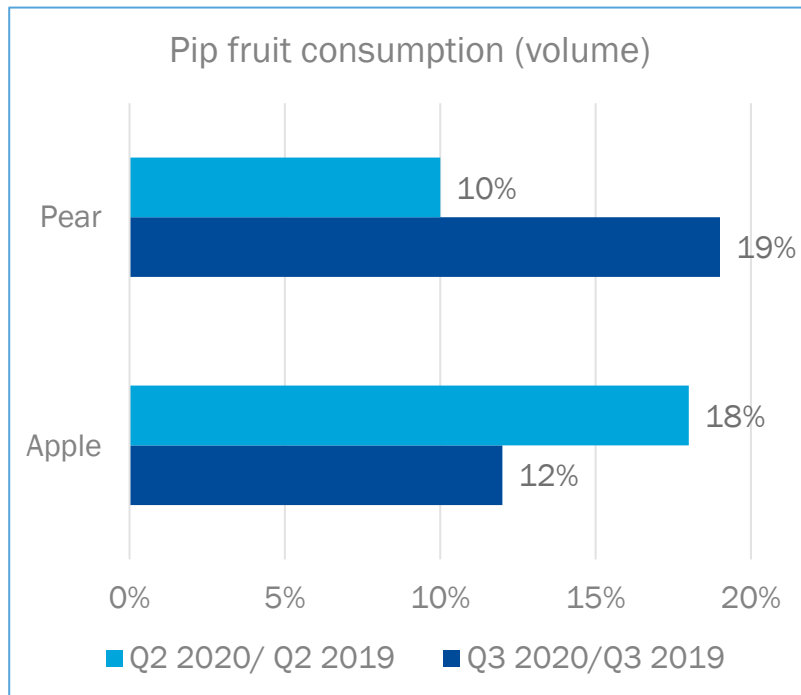
Fruit & Vegetables Market Observatory
10 December 2020

France

Focus on pip fruits

Pip fruit consumption increased in value in Q3 2020 compared to Q3 2019.

Consumption of apples and pears rose sharply in the 2nd and 3rd quarters 2020. Consumption at home benefited from the periods of confinement marked by the closure of restaurants, schools (and therefore canteens), the development of teleworking, etc.



Source: Interfel

France

Focus on apples & pears

Apple



During P11 (5 October to 1 November), volume purchases (home consumption) of apples fell compared to 2019 (-4.6% compared to P11 2019), but value increased thanks to a rising average price (+9%).

NB: As of 1st November, French apple production in 2020 was confirmed to be the lowest in 7 years. Prices are increasing over a year and in relation to the 2015-2019 average.

Pear



During P11 (5 October to 1 November), volume purchases (home consumption) of pears increased compared with 2019 (+14% in volume and +20.6% in value compared with P11 2019), with an increase in purchasing frequency and basket size.

NB: As of 1 November 2020, the French production of table pears is estimated at nearly 140,000 tonnes for 2020, a clear increase over one year and above the level of the five-year average. At the beginning of the season, pear prices fell over one year but remain close to the 5-year average prices.

Source: FranceAgrimer

France

Focus on apples

The penetration rate of apples among French consumers is 88,9% in 2020. It increased by 1.5 points over 2019.

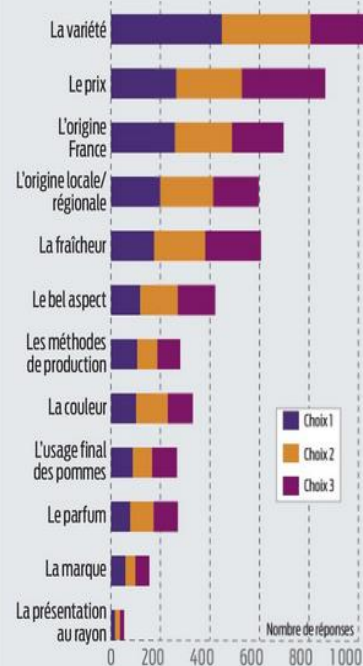
The first two criteria of purchase are the variety and the price, before the origin France.

In terms of product segmentation, the golden and the gala accounted for nearly 50% of sales in 2020 (rolling annual total as of mid-June 2020).

Source: Linéaires

L'origine France, troisième critère d'achat

Quand vous achetez des pommes, quels sont parmi ces différents critères de choix les trois qui sont les plus importants pour vous ?



Source: Baromètre de la consommation des pommes en 2019, source CTIFL, sur la base de 1919 acheteurs de pommes.

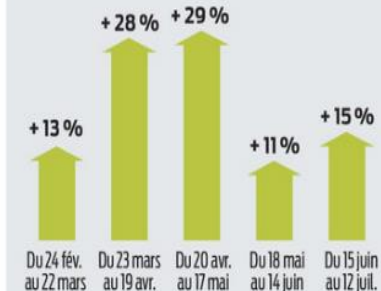
88,9 %

C'est le taux de pénétration de la pomme auprès des consommateurs français en 2019-2020. Il est supérieur de 1,5 point à celui de l'année précédente, à la même époque, notamment grâce au confinement. La poire n'a pas bénéficié du même souffle, puisque son taux de pénétration (64,3 %) était lui en baisse d'un point.

Source: Kantar, origine fabricant.
Pénétration total France sur douze mois au 19 avril 2020 versus même période au 21 avril 2019.

Cinq mois entre +11% et +29% !

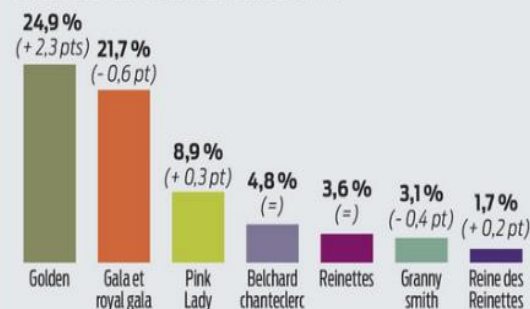
Évolution par période de la quantité de pommes achetées par les ménages Français en 2020.



Source: Kantar, origine ANPP.

La golden a accentué sa première place

Part de marché valeur des premières variétés de pommes



Source: Panel consommateurs, origine fabricant. Part de marché valeur, total distribution, sur un an au 14 juin 2020, versus même période an dernier.

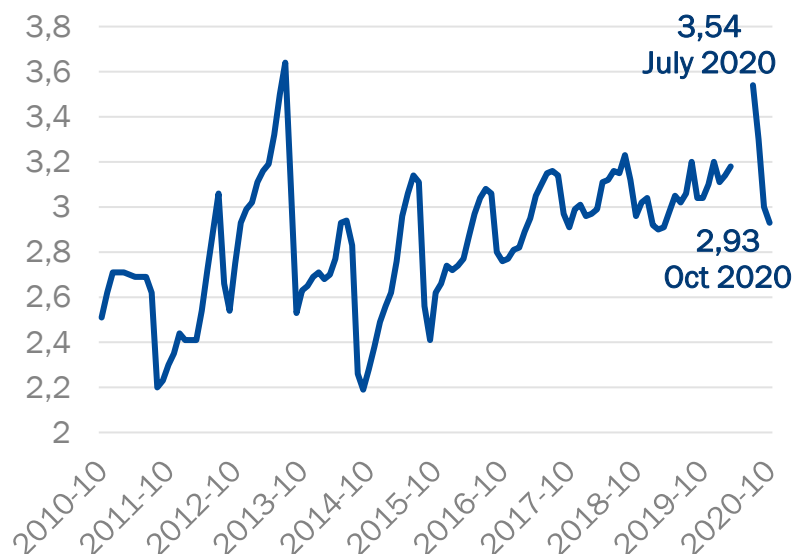
Au coude à coude avec la gala l'an dernier, la golden a effectué une excellente saison 2019/2020. La prochaine devrait favoriser la gala, dont la production française n'est qu'en légère baisse (- 5 %), alors que celle de la golden est estimée à - 26 %. Pink Lady devrait conforter sa troisième place.

France

Consumer prices

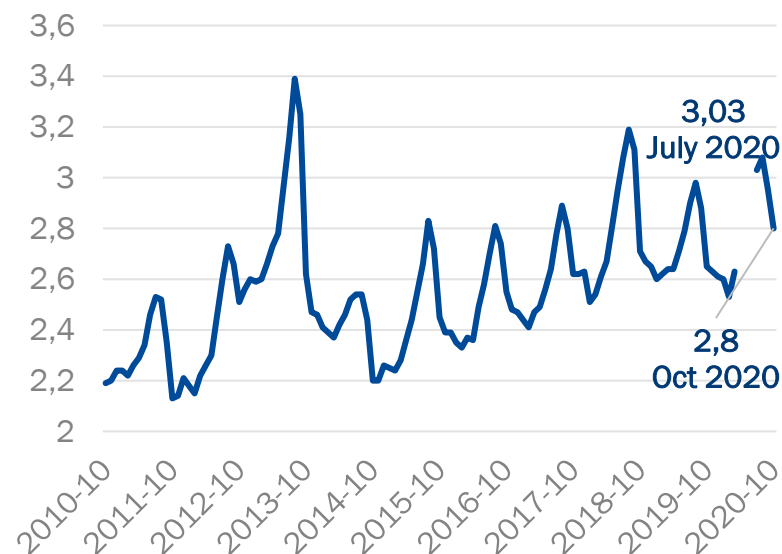
Consumer prices for apples and pears increased during the first 10 months of the year. However, it should be noted that price surveys could not be carried out during the first period of containment, which explains the break in the statistical series (April to June 2020).

Pear (€/kg)



	2017	2018	2019	2020 (10 months)
Average price	3,012	3,069	3,035	3,17
Growth	5,1%	1,9%	-1,1%	6%

Apple (€/kg)



	2017	2018	2019	2020 (10 months)
Average price	2,613	2,792	2,721	2,803
Growth	3,7%	6,9%	-2,5%	2,3%

Source: INSEE

Italy

- Over spring months, and during the first lockdown, apple consumption saw an increase of **18%**;
- Similarly, an increasing trend was seen for processed apples and apple juices;

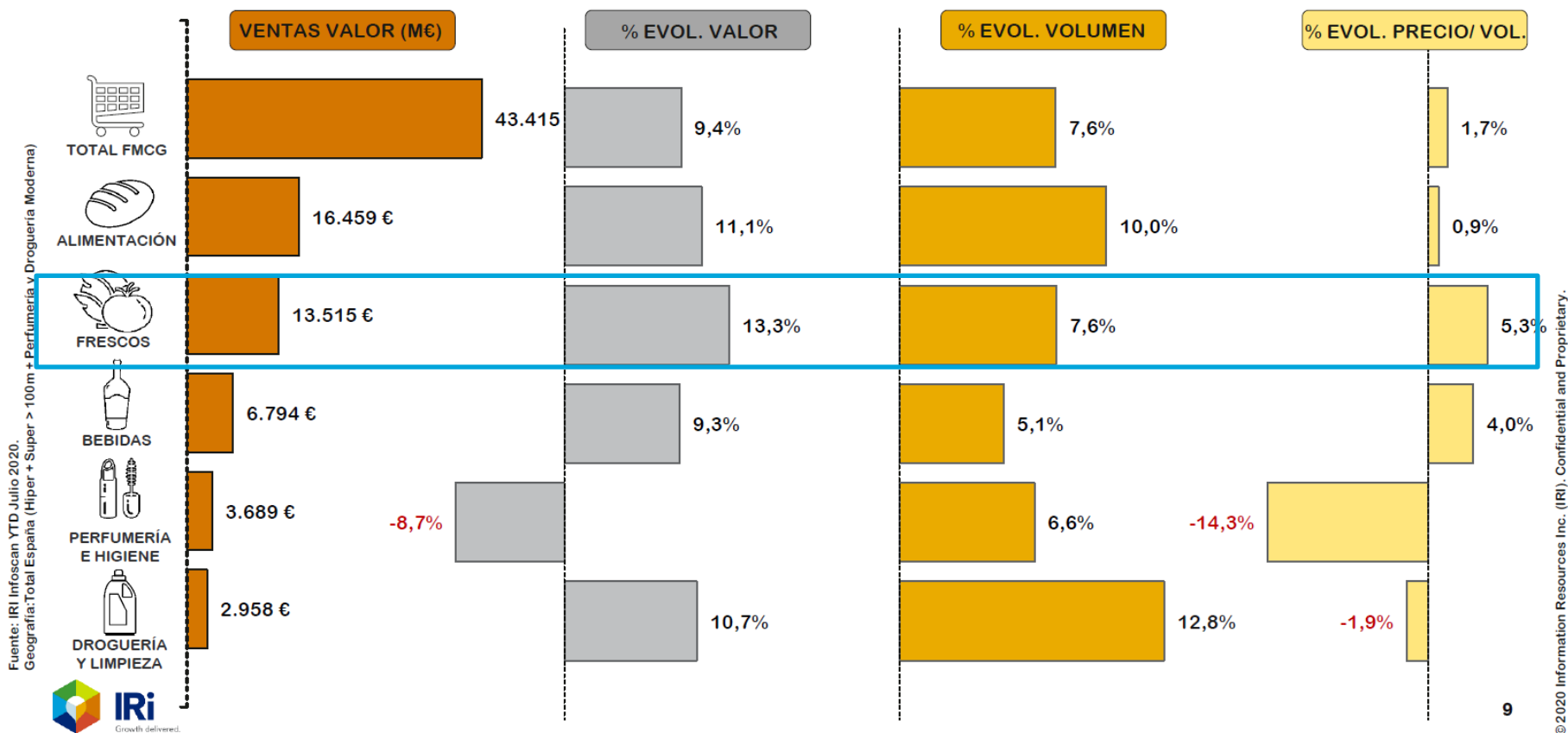
Source: <https://food.firstonline.info/coronavirus-gli-italiani-ricorrono-alle-mele-crescono-i-consumi/>

Spain



Visión general del Gran Consumo: Evolución de los principales KPI's por departamento

YTD Julio 2020



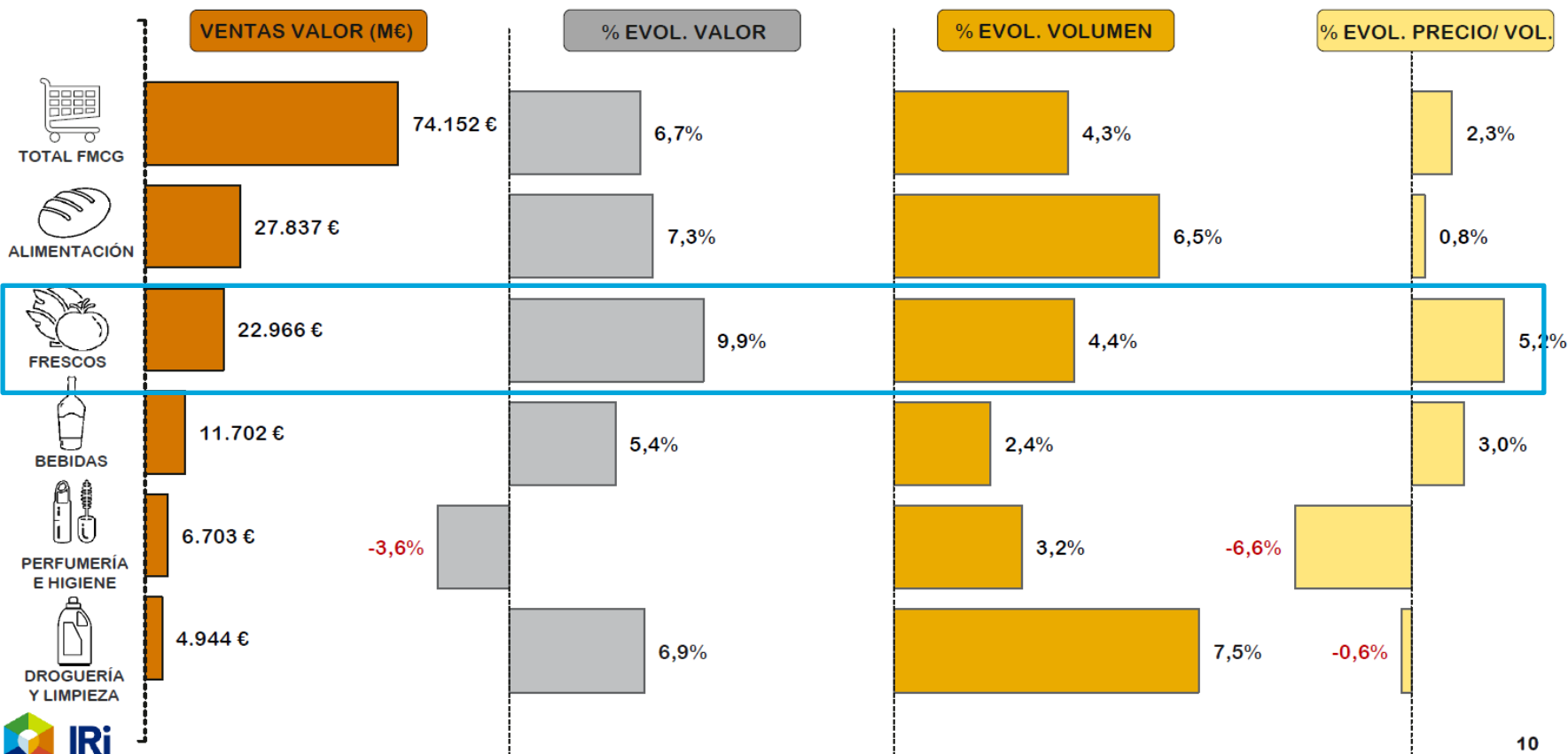
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Spain



Visión general del Gran Consumo: Evolución de los principales KPI's por departamento

TAM Julio 2020



Fuente: IRI Infoscan YTD Julio 2020.
Geografía: Total España (Hiper + Super > 100m + Perfumaría y Droguería Moderna)



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