TRENDS IN SALES OF VEGETABLE PRODUCTS – A RETAIL PERSPECTIVE

Fruit & Vegetables Market Observatory

17 JUNE 2021

EuroCommerce for retail & wholesale

General trends in retail in 2021

- grocery spending at an all time high (due to HoReCa closures, lockdowns)
- going towards a ‘new normal’ - retail will once again need to rebalance its role within the broader ecosystems with Horeca
- Impact of the pandemic: consumers both uptrading and downtrading
- In 2020-21, significant shift towards healthy/sustainable/local product:
  - ✓ 30% of European consumers will focus on **healthy** eating in 2021
  - ✓ 60% of European consumers are willing to pay more for **sustainable alternatives** - 70% for fresh food (fruit, vegetables, and meat)
- Increased demand for organically certified products

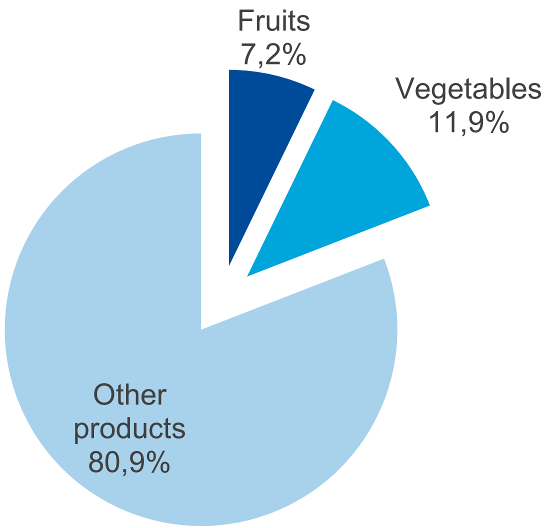
Source: McKinsey 2021

France

Fruit & vegetables : key data (home consumption)

Million € 2020	Total	Fruit	Vegetables
Fresh	69%		
Processed	31%		
Total	**38 221**	**14 446**	**23 775**

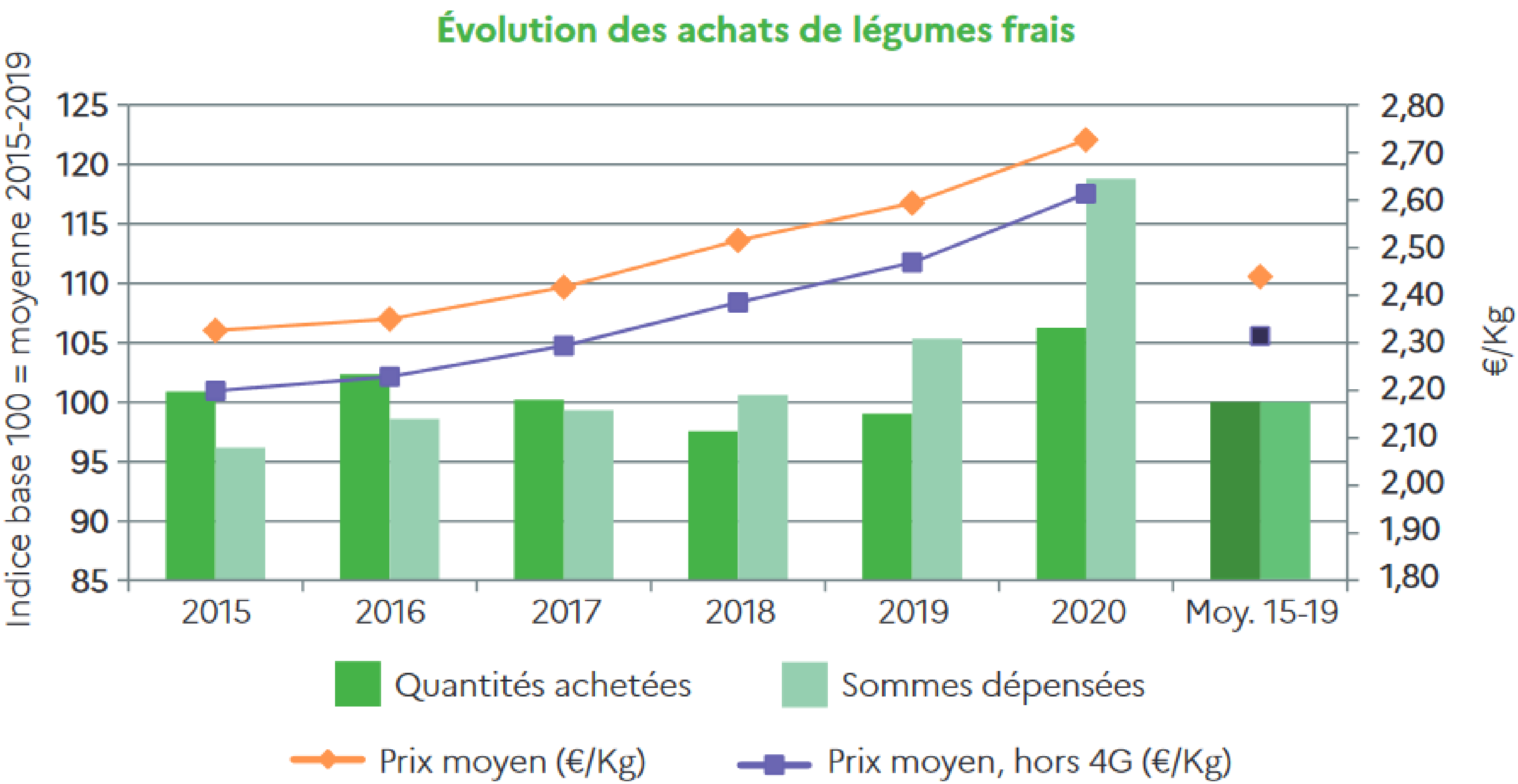
consumption breakdown (2020 % value)



Source: INSEE - 2020

France

Vegetables : Evolution of fresh vegetables purchases (2020)



Source: Kantar Worldpanel - 2020

EuroCommerce

France

Vegetables : the strongest increases in consumption in 2020

TOP Légumes : Évolution en valeur
(sommes dépensées pondérées par le poids du produit dans le rayon)

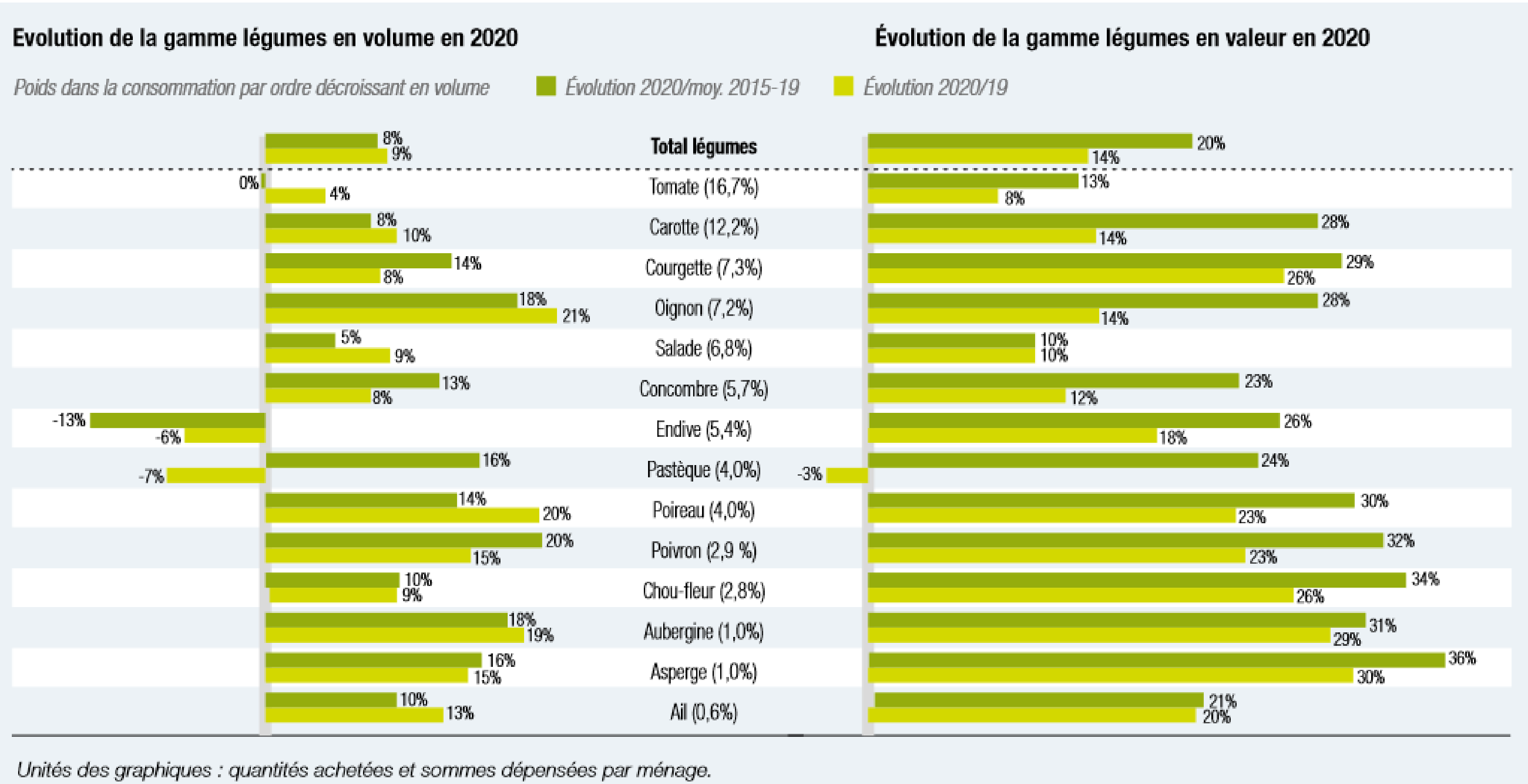
En hausse	Var. 2020/2019
Asperge	+ 31%
Courgette	+ 27%
Poivron	+ 24%
Poireau	+ 24%
Endive	+ 19%
Champignon de couche	+ 17%
Oignon	+ 15%
Carotte	+ 15%
Salade	+ 11%
Tomate	+ 9%
En baisse	
Pastèque	- 2%

Source: Kantar Worldpanel

France

Vegetables: consumption (at home consumption)

The price effect was decisive in 2020, bringing consumption in value terms to a high level.



Source: Interfel - 2020

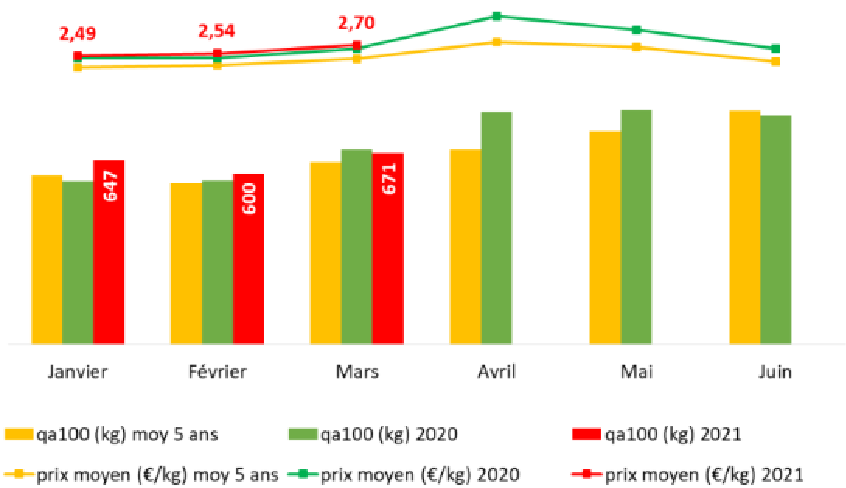
EuroCommerce

France

Vegetables : Evolution of fresh vegetables purchases (2021 : Q1)

LEGUMES FRAIS
Évolution des quantités & prix moyens d'achats

QA 100(*) de janvier à mars 2021 = 1 919 kg
Soit + 4,5 % *vs* 2020
+ 6,8 % *vs* moyenne 2016-2020



(*) Quantité achetée pour 100 ménages

	Quantité achetée pour 100 ménages		
	Janvier à mars 2021 (kg)	Evol 21 *vs* 19 (%)	Evol 21 *vs* 20 (%)
Carotte	290,2	+ 8,5	= 0,0
Tomate	191,8	+ 11,0	+ 10,1
Endive	172,8	-8,9	-0,9
Oignon	143,4	+ 21,8	+ 3,7
Salade	134,4	+ 12,5	+ 8,7
Courgette	122,9	+ 12,9	+ 1,1
TOTAL LEGUMES	**1918,6**	**+ 9,7**	**+ 4,5**

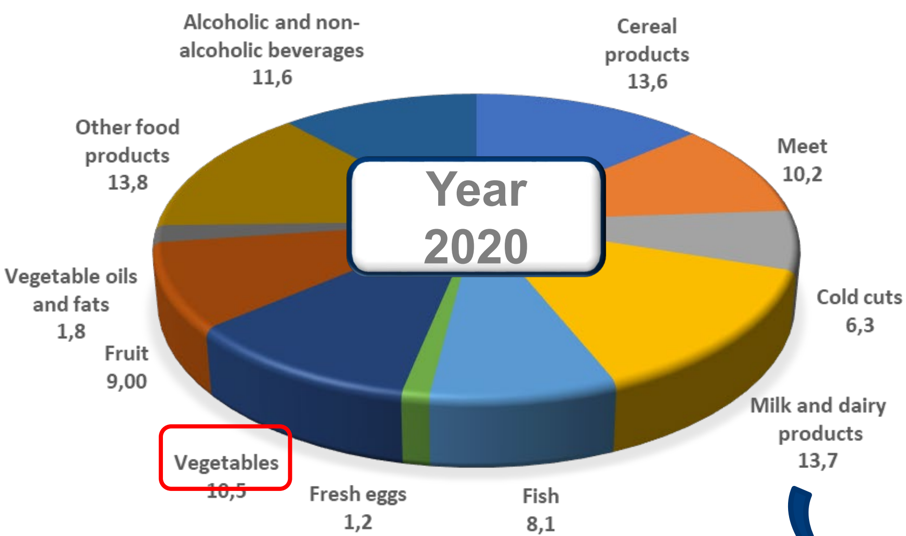
Source : Kantar Worldpanel

Source: Kantar Worldpanel

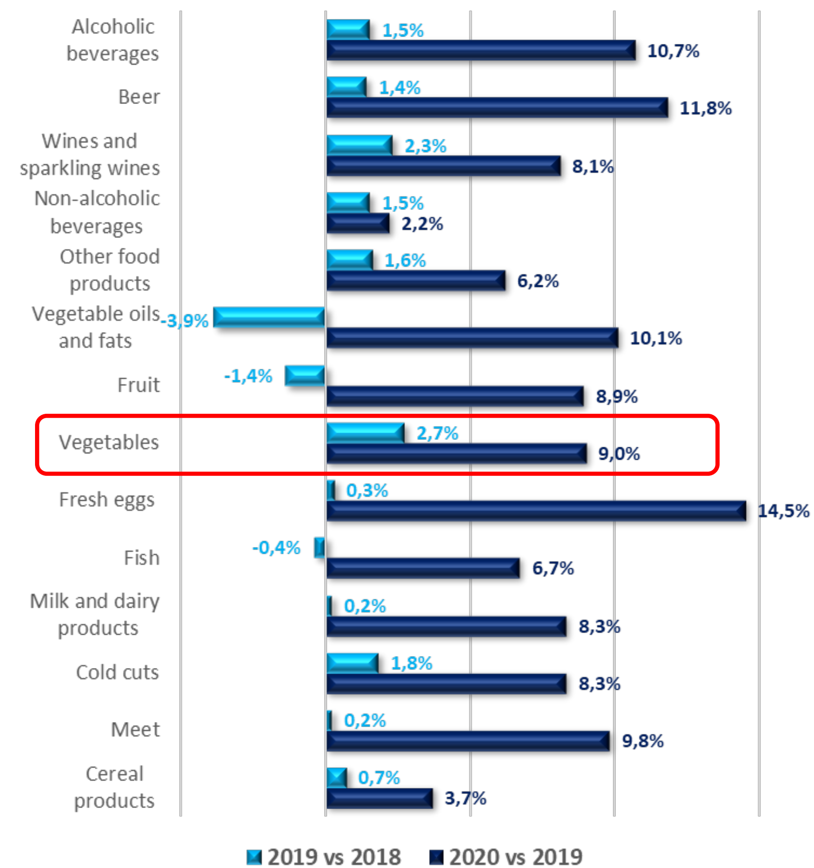
Italy

Household purchases – Year 2020

Sales Value
(Product shares)



Sales Value
(Percentage changes yoy)

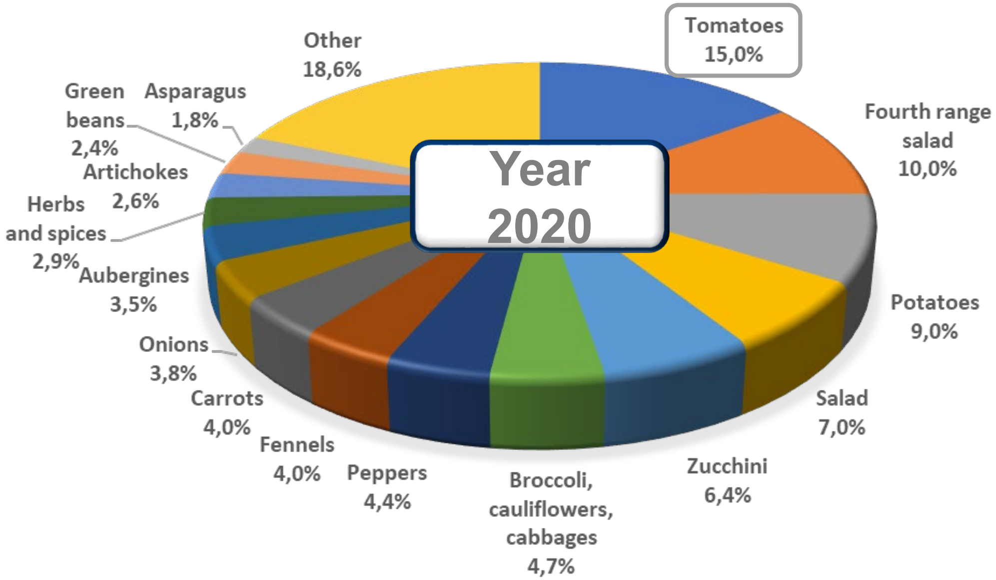


Source: ISMEA based on Nielsen CPS data

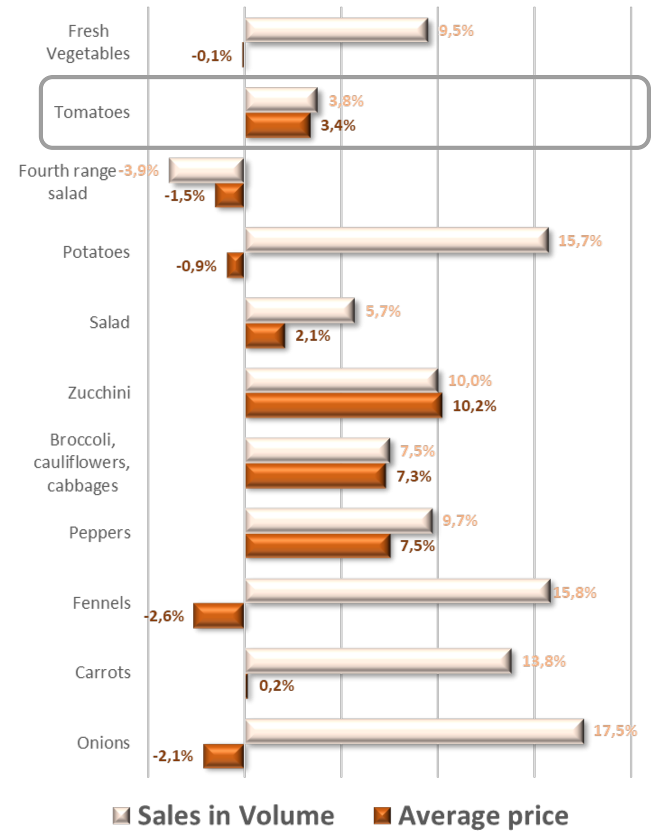
Italy

Household purchases – Year 2020
FRESH VEGETABLES

Sales Value
(Product shares)



Sales Value
(Percentage change yoy 2020 vs 2019)

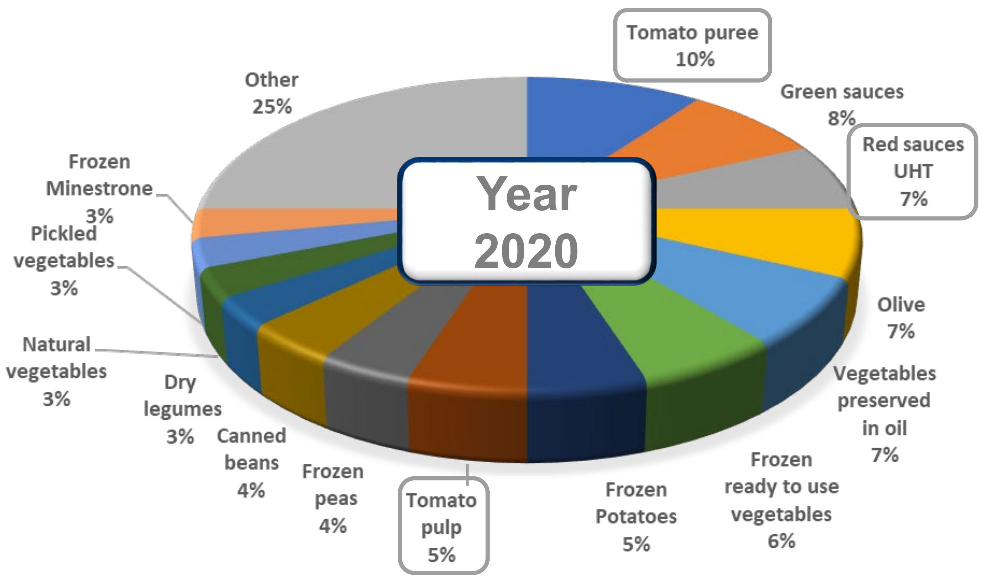


Source: ISMEA based on Nielsen CPS data

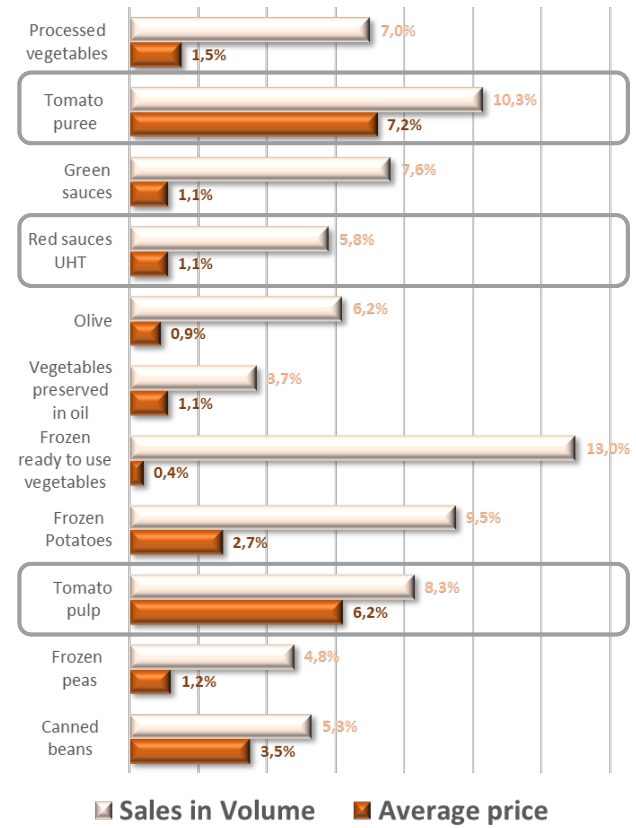
Italy

Household purchases – Year 2020
PROCESSED VEGETABLES

Sales Value
(Product shares)



Sales Value
(Percentage change yoy 2020 vs 2019)

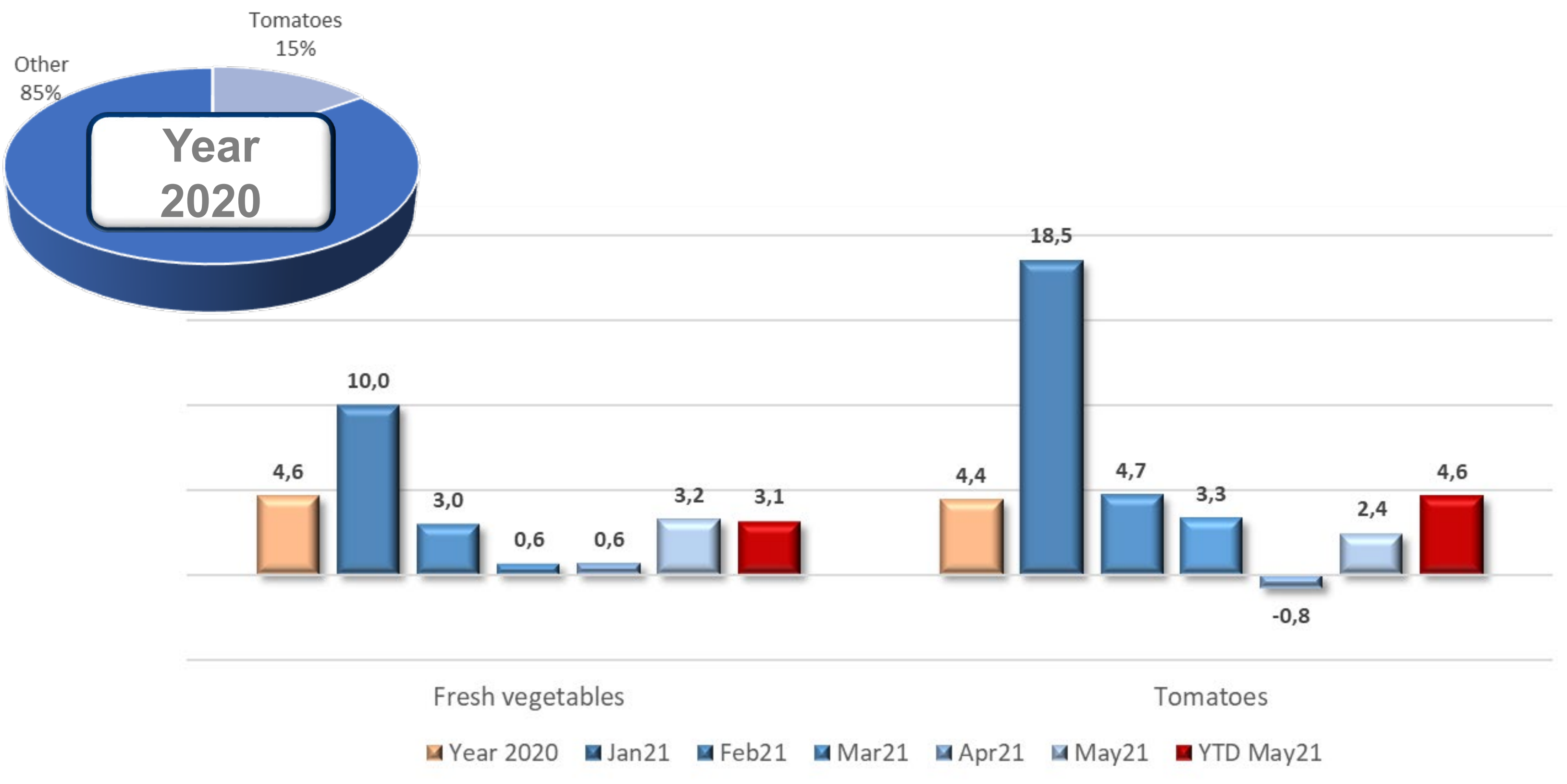


Source: ISMEA based on Nielsen CPS data

EuroCommerce

Italy

FRESH VEGETABLES - Trend in the modern retail – Sales value (Yoy)



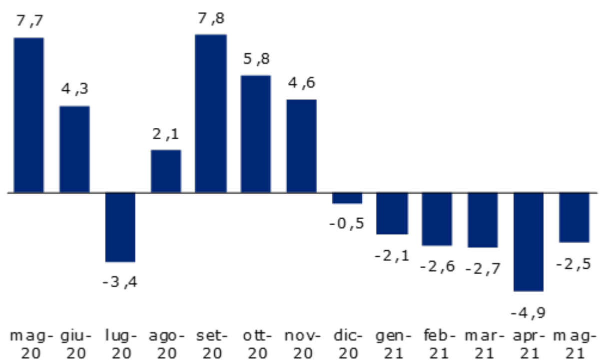
Source: Nielsen Trade Service

EuroCommerce

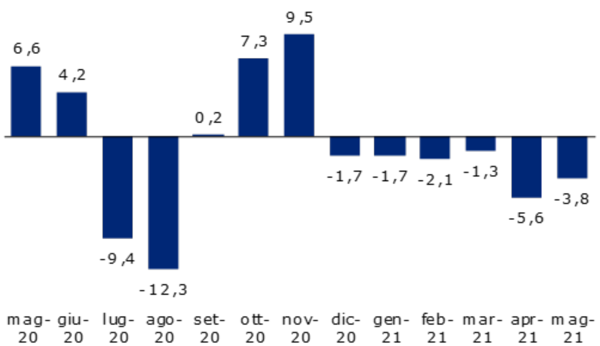
Italy

Prices evolution YoY – Hypermarkets and supermarkets - Variable weight

ORTOFRUTTA PV

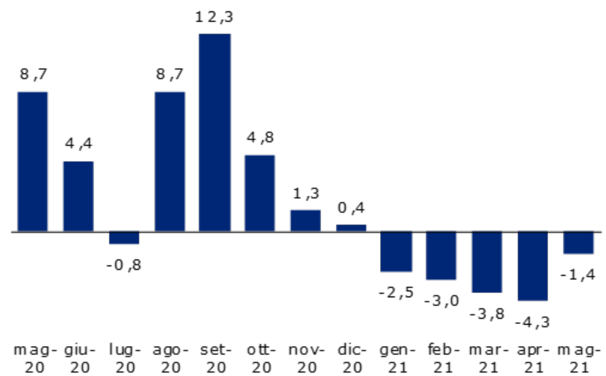


VERDURA PV



Carrello della Spesa – Indice Tendenziale

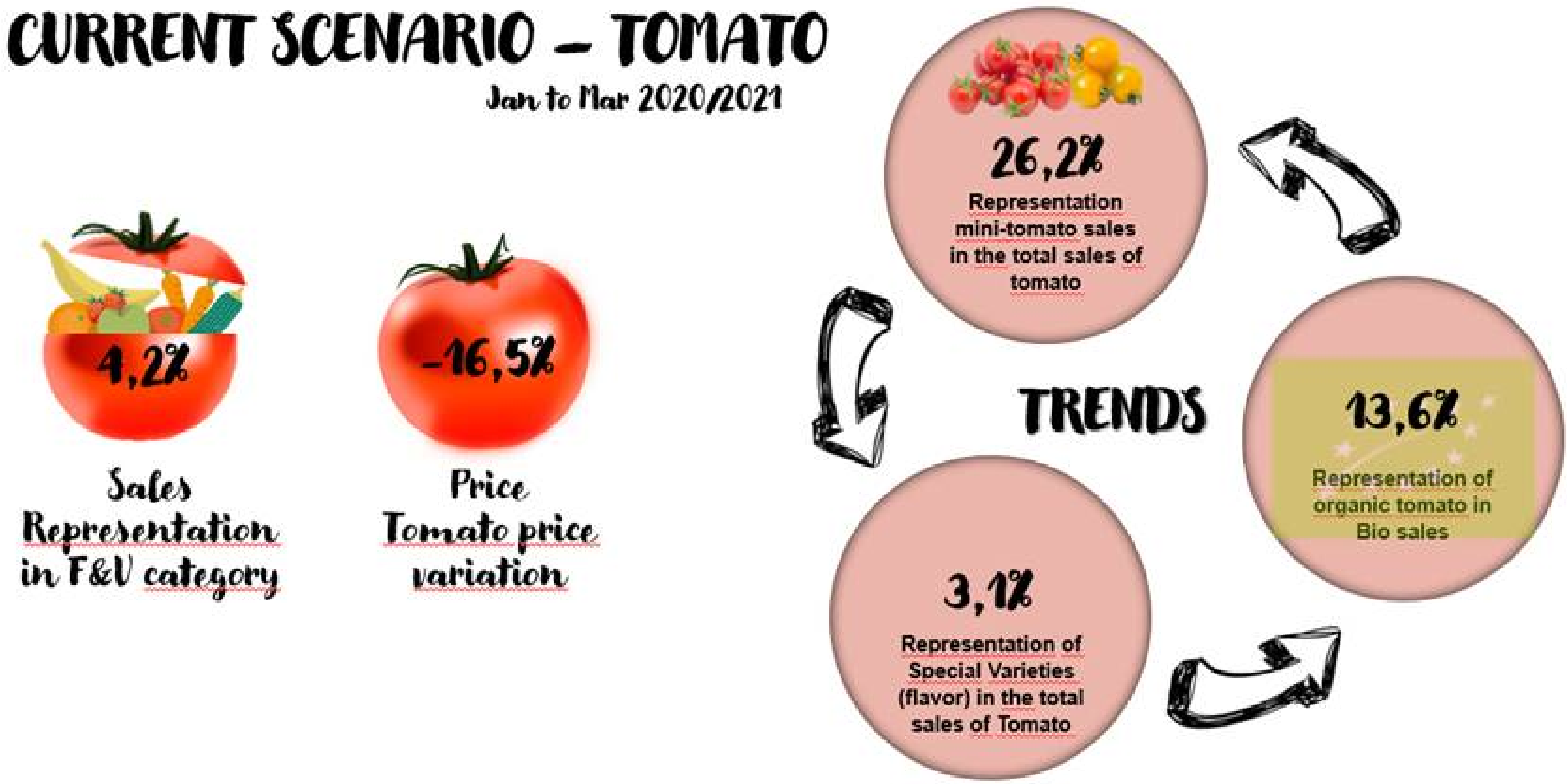
FRUTTA PV



Source: IRI – Carrello della spesa

EuroCommerce

Portugal



Source: Jeronimo Martins

EuroCommerce

Spain: evolution in value

Evolución por sección: alimentación, frescos y bebidas

Evolución en valor vs. YA y vs. 2YA

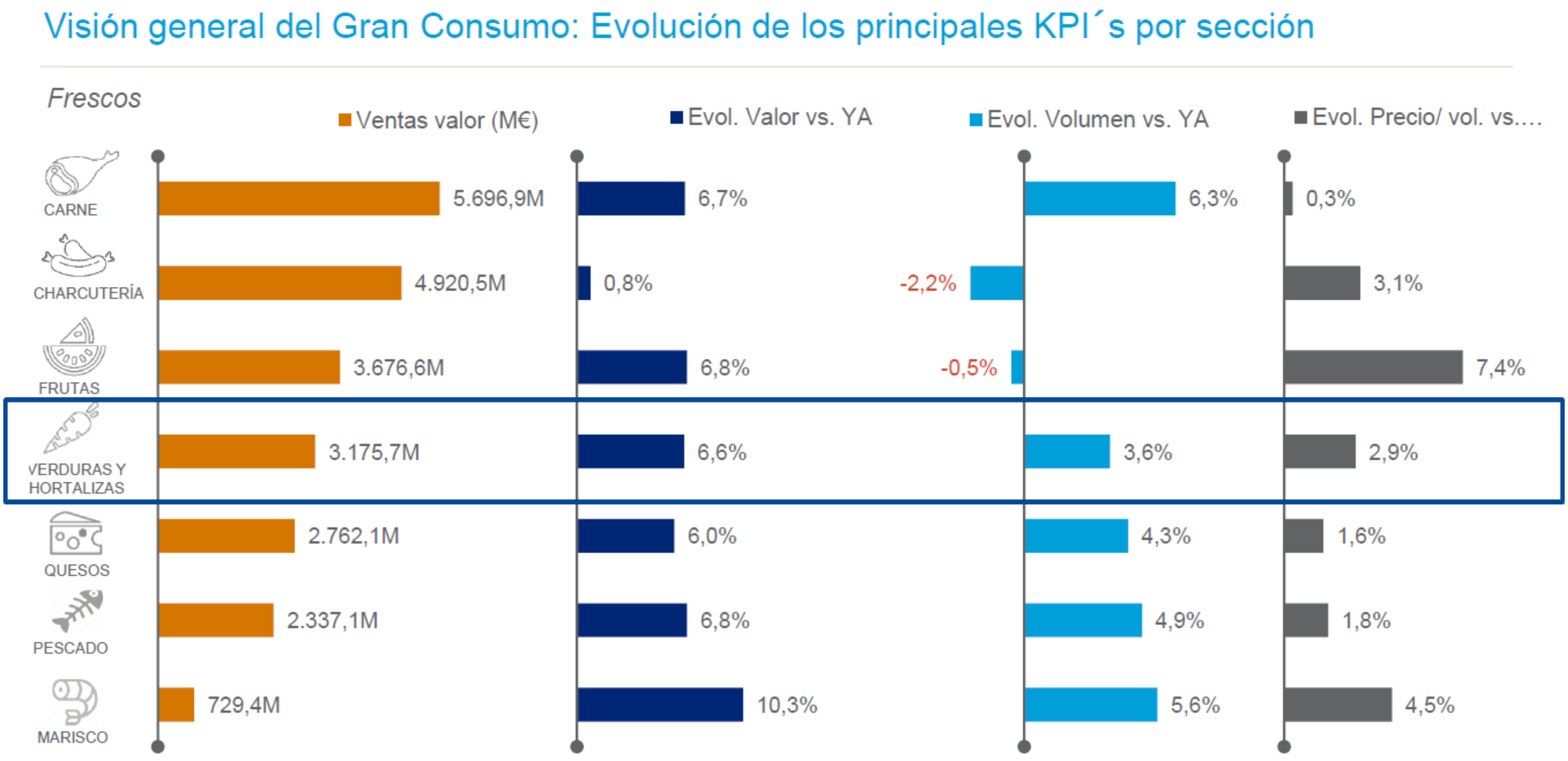
ALIMENTACIÓN	TAM 21 vs. 20	TAM 21 vs. 19
ALIMENTACIÓN	**+4,0%**	**+9,7%**
ALIMENTACION SECA	4,5%	10,1%
CONGELADOS	10,1%	18,1%
CONSERVAS	2,1%	8,3%
DERIVADOS LACTEOS	2,5%	4,9%
HUEVOS	4,1%	12,0%
PRODUCTOS 4-5 GAMA	-4,1%	3,1%

FRESCOS	TAM 21 vs. 20	TAM 21 vs. 19
FRESCOS	**+5,4%**	**+14,0%**
CARNE	6,7%	14,3%
CHARCUTERIA	0,8%	9,1%
FRUTAS	6,8%	15,7%
VERDURAS Y HORTALIZAS	6,6%	21,7%
QUESOS	6,0%	14,2%
PESCADO	6,8%	12,5%
MARISCO	10,3%	11,3%

BEBIDAS	TAM 21 vs. 20	TAM 21 vs. 19
BEBIDAS	**+7,0%**	**+10,4%**
LECHES Y BATIDOS	0,8%	3,9%
CERVEZAS	20,8%	29,2%
BEBIDAS REFRESCANTES	5,7%	8,8%
VINOS	13,7%	16,4%
BEBIDAS ESPIRITUOSAS	8,3%	10,0%
AGUAS	-2,4%	-0,6%
ZUMOS	-12,6%	-14,8%
BEBIDAS VEGETALES	8,6%	15,5%
ESPUMOSOS	1,2%	4,0%

Source: IRI

Spain: evolution of key product categories



Source: IRI

Spain: online vs instore sales

Análisis de la cesta de la compra física vs. online

TIENDA FÍSICA

	PESO EN VENTAS VOLUMEN
AGUA SIN GAS	14,0%
LECHE LARGA CONSERVA	8,7%
FRUTA	6,1%
CERVEZAS	5,7%
VERDURA Y HORTALIZAS	5,5%
REFRESCOS DE COLA	3,7%
CARNE	3,0%
PARAFARMACIA	2,3%
YOGURES FRESCOS SÓLIDOS	2,0%

LA CESTA DE LA COMPRA

Estas categorías suponen el

50%

para el TAM en volumen del **TOTAL FMCG**

TIENDA ONLINE

	PESO EN VENTAS VOLUMEN
AGUA SIN GAS	19,0%
LECHE LARGA CONSERVA	12,2%
CERVEZAS	4,4%
VERDURAS Y HORTALIZAS	4,1%
REFRESCOS DE COLA	3,7%
FRUTA	3,5%
CARNE	1,7%
YOGURES FRESCOS SÓLIDOS	1,5%

Source: IRI