

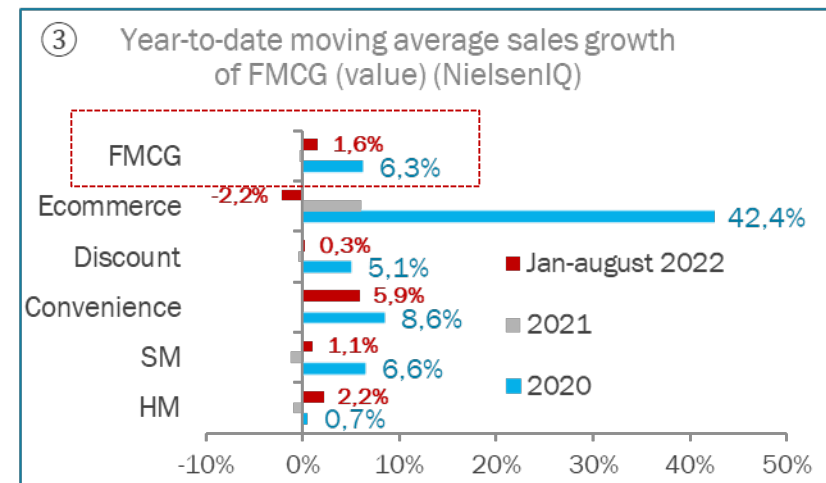
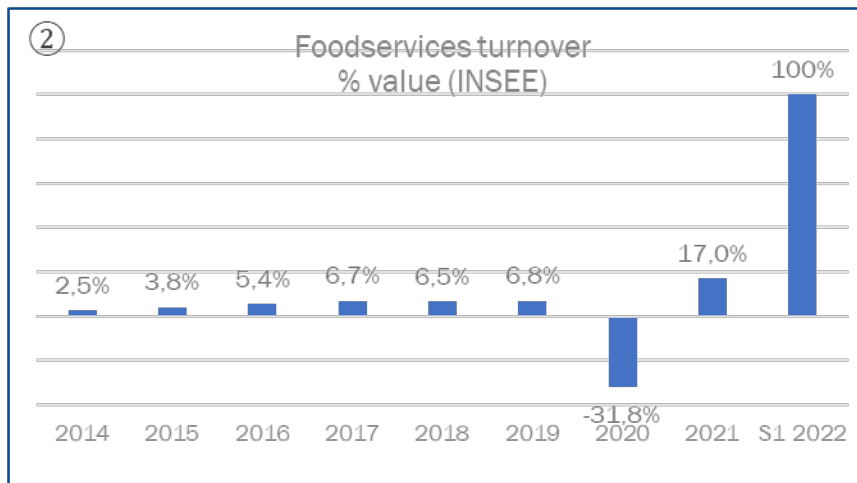
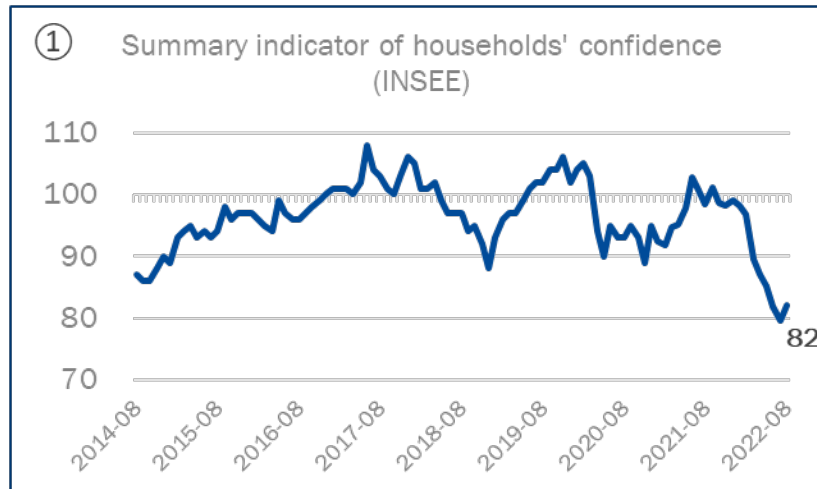


TRENDS IN SALES OF FRUIT – A RETAIL PERSPECTIVE

Citrus Fruit Observatory
29 November 2022

France

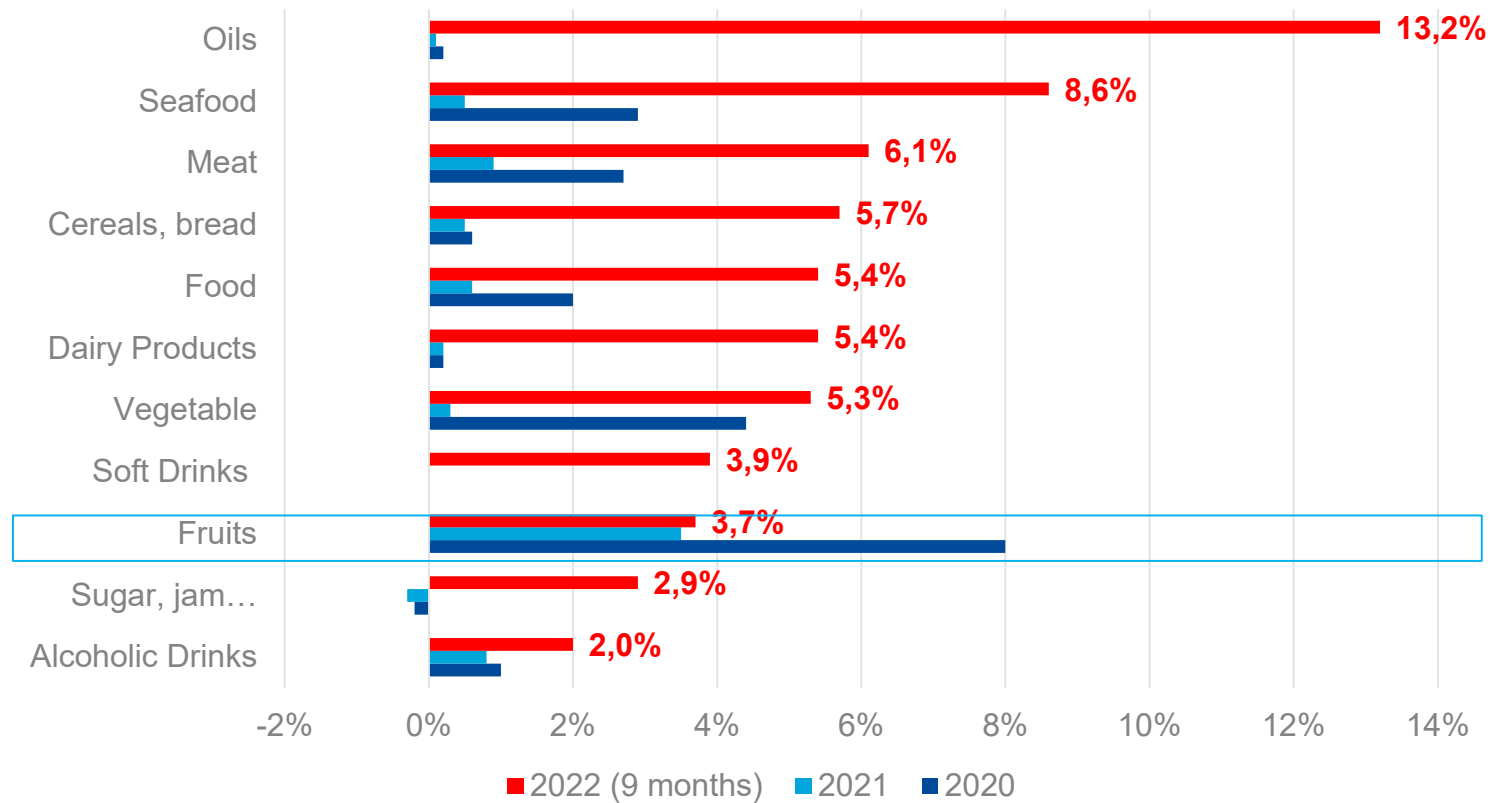
Economic context



France

Inflation: food

Consumer Food Prices

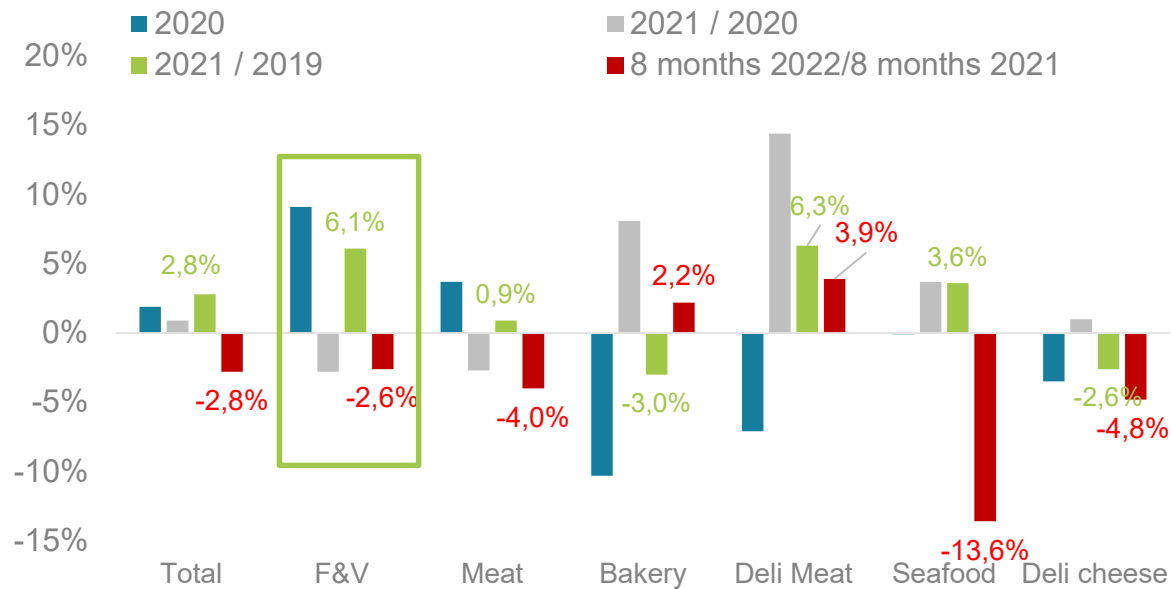


Source: INSEE

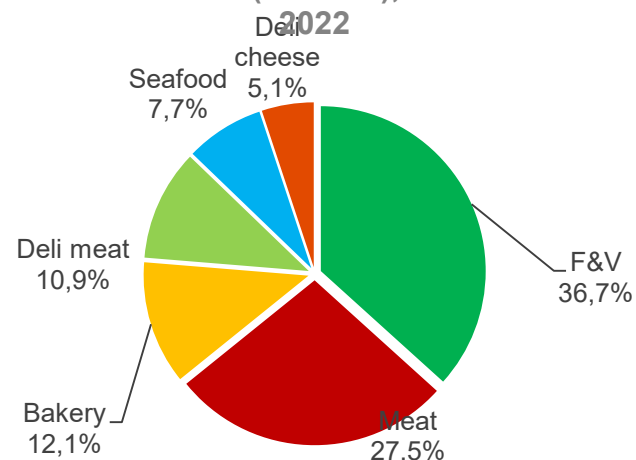
France

Focus on fresh food in hypermarkets and supermarkets

Sales growth of fresh food products (% value)



Fresh food (% value), 8 months



France

Organic market (all products)

Evolution des ventes et de l'offre bio

Evolution (%) – Total PGC FLS Bio - Tous circuits GSA (hors EDPM allemandes pour l'offre)



Le bio

CAM : -5,4%

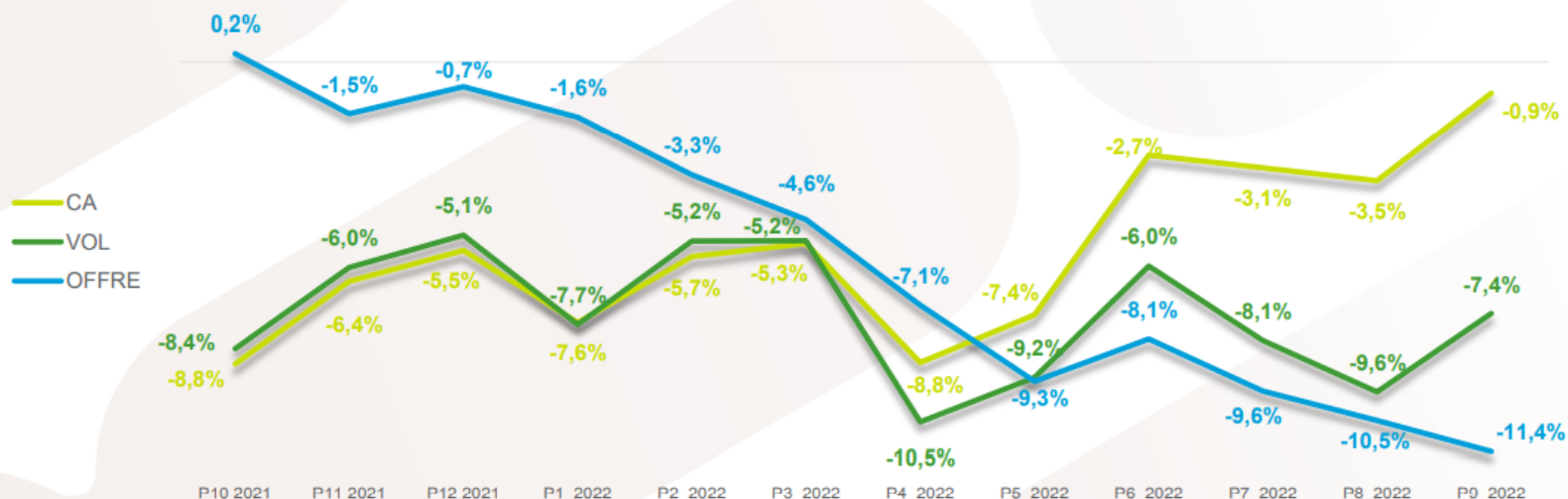
CAM : -7,2%

CAM : -5,7%

CC : -5,0%

CC : -7,4%

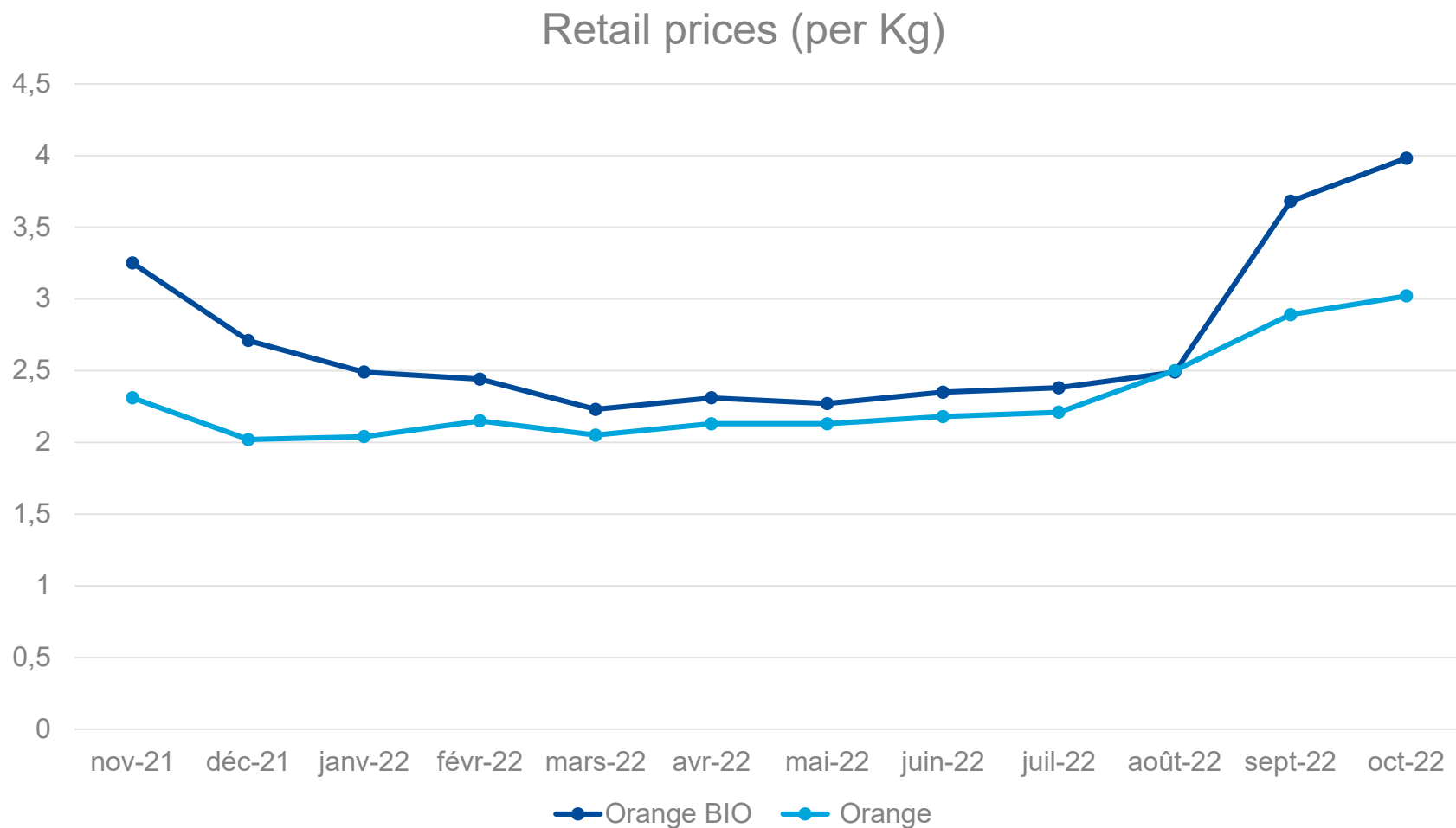
CC : -7,3%





France

Retail prices for conventional and organic oranges



Source : AgriMer

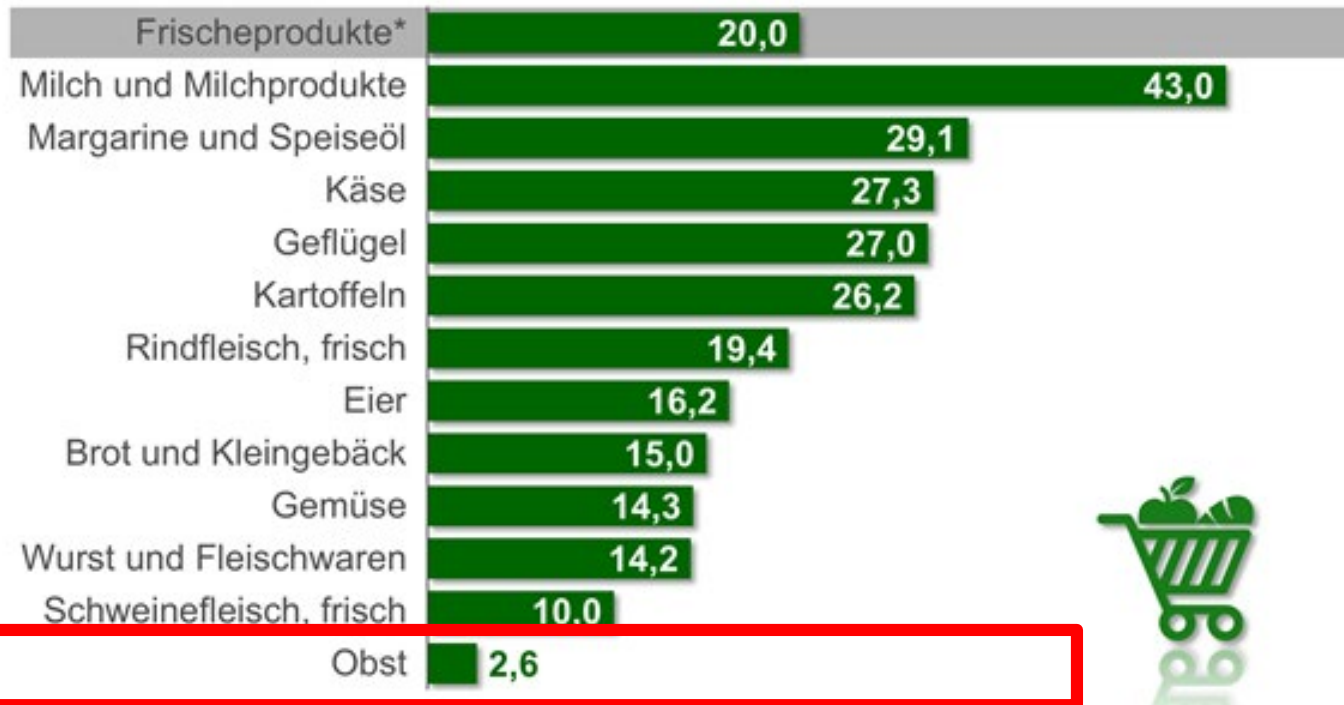
Germany

Food inflation

Lebensmittelpreise: Neues Rekordniveau



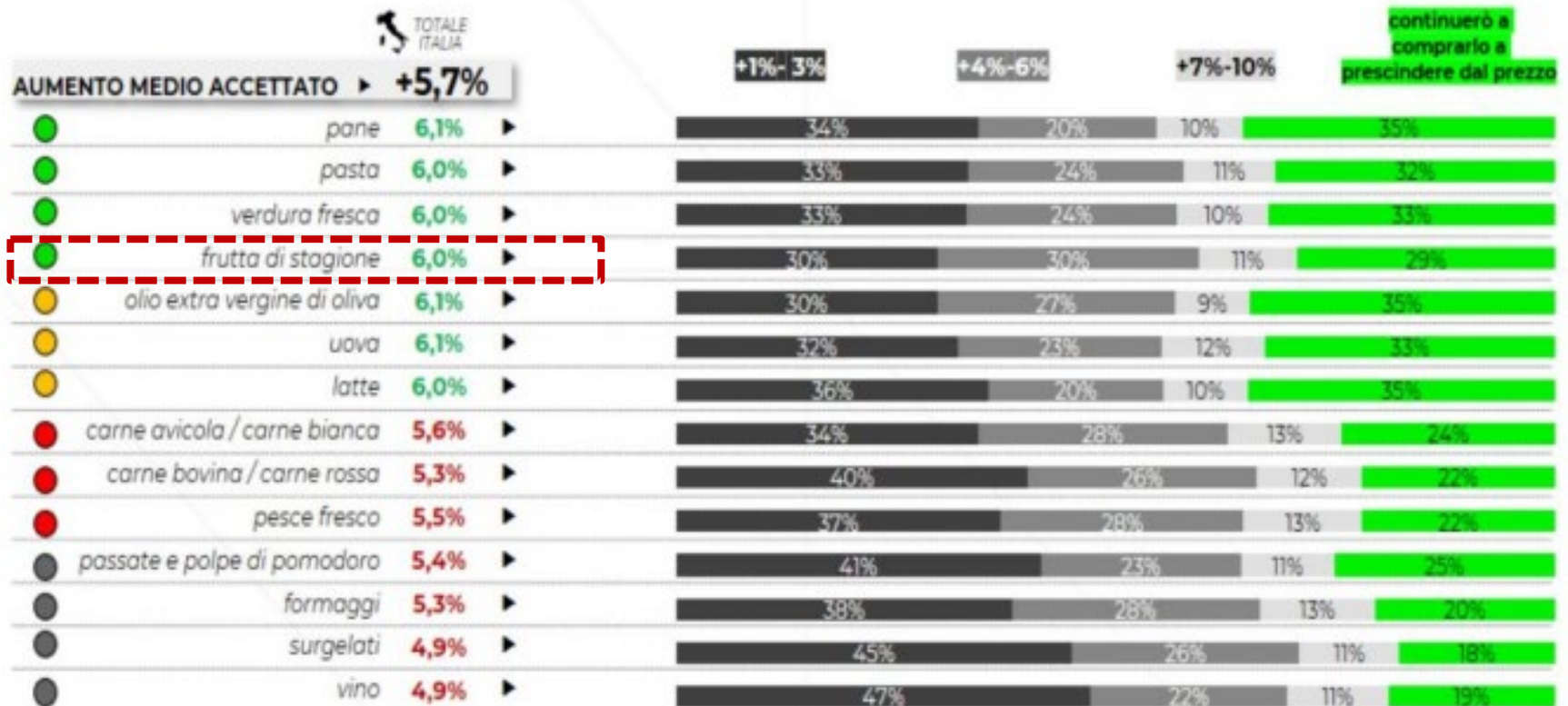
Veränderungsrate der Verbraucherpreise für frische Lebensmittel in Deutschland, September 2022 vorläufig, in % gegenüber Vorjahresmonat



*Summe aller aufgeführten Produkte aus konventioneller Erzeugung.

Italy

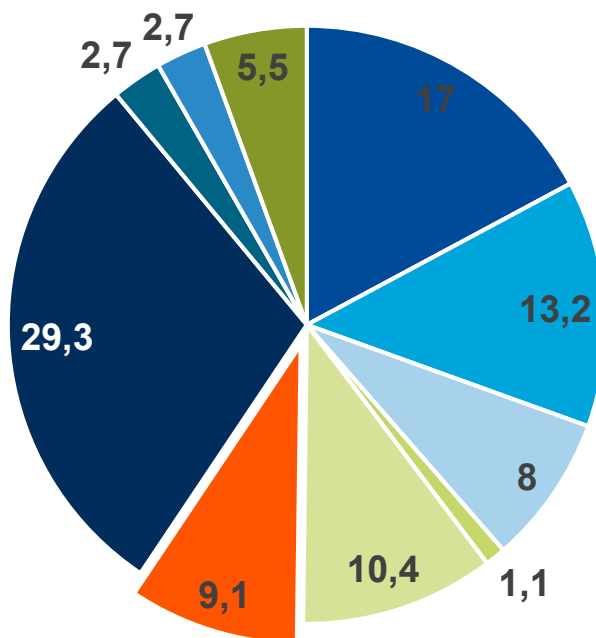
Consumer behaviour in the cost of living crisis



Source : ISMEA

Italy

The 2022 shopping trolley as of September 2022



- Fresh F&V decreased by 11% in volume (Q1 2022 vs Q1 2021)
- Prices for F&V are +7% vs 2021, +18% vs 2018

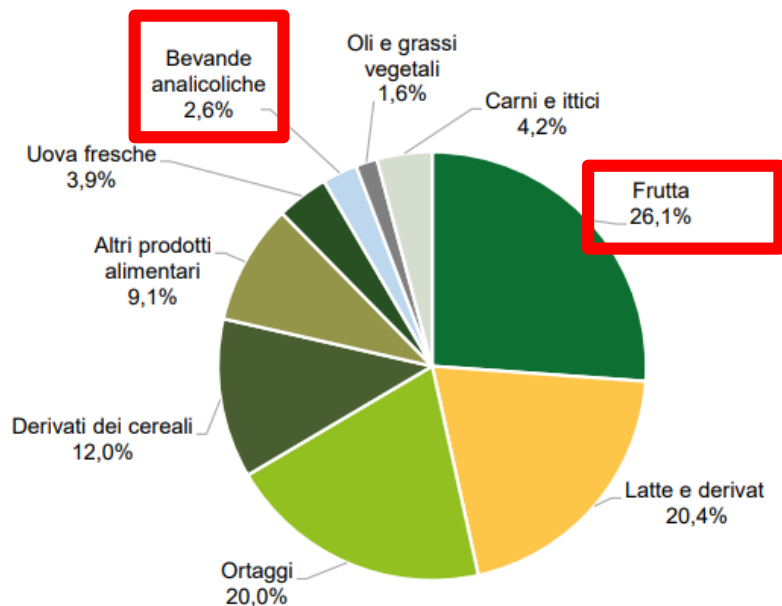
■ Meat
■ Eggs
■ Other
■ Alcoholic drinks

■ Milk & dairy
■ Vegetables
■ Water

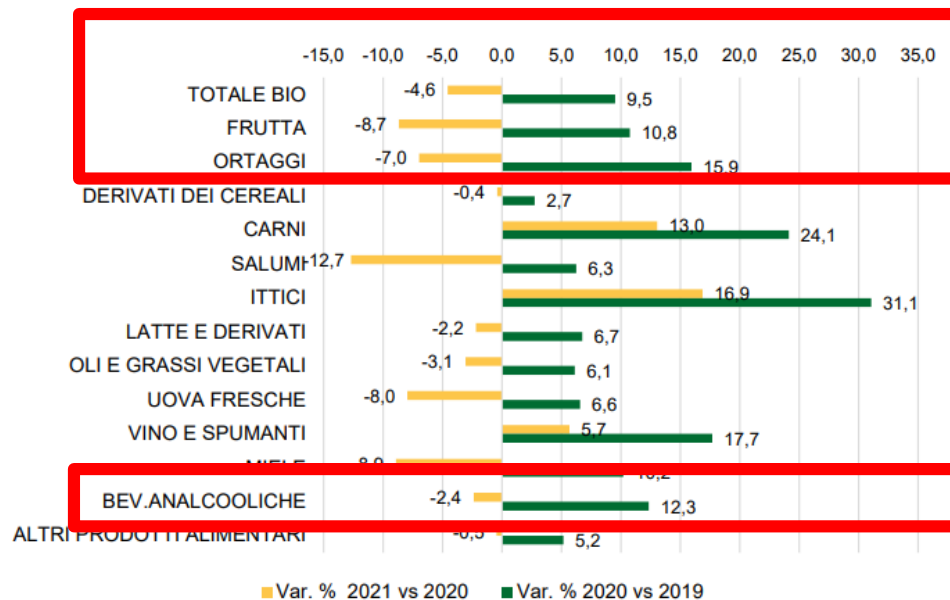
■ Fish
■ Fruit
■ Juices and sodas

Italy

Organic market in 2021 and 2022



Elaborazioni Ismea su dati Nielsen



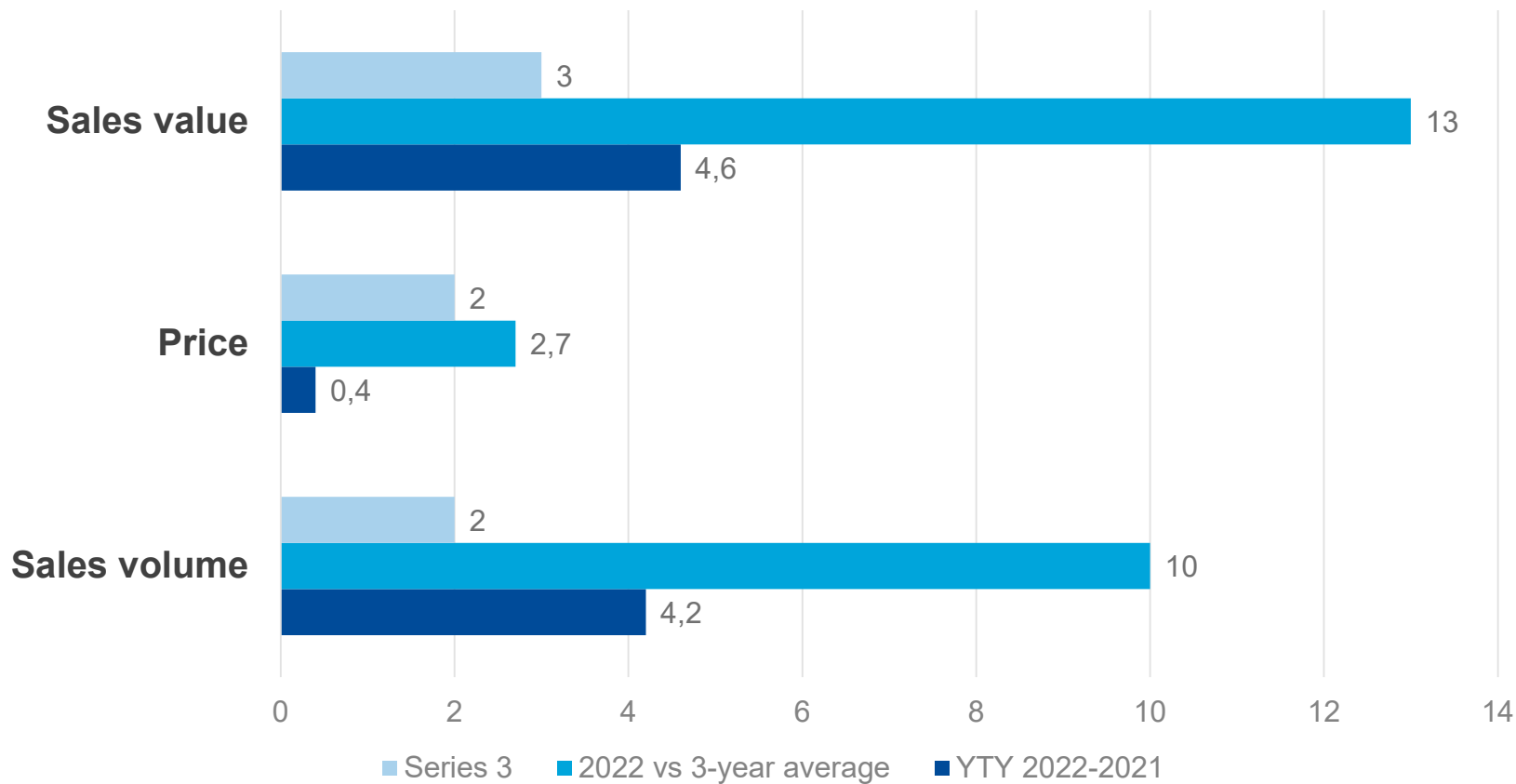
Elaborazioni Ismea su dati Nielsen



Italy

Focus on oranges – 1st campaign

First campaign 2021-2022

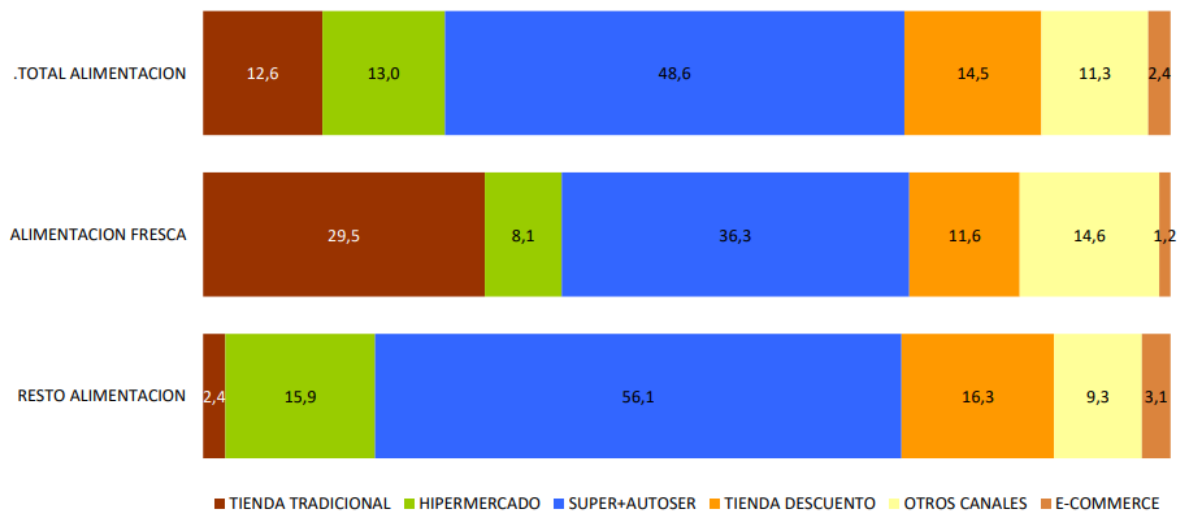


Source : ISMEA

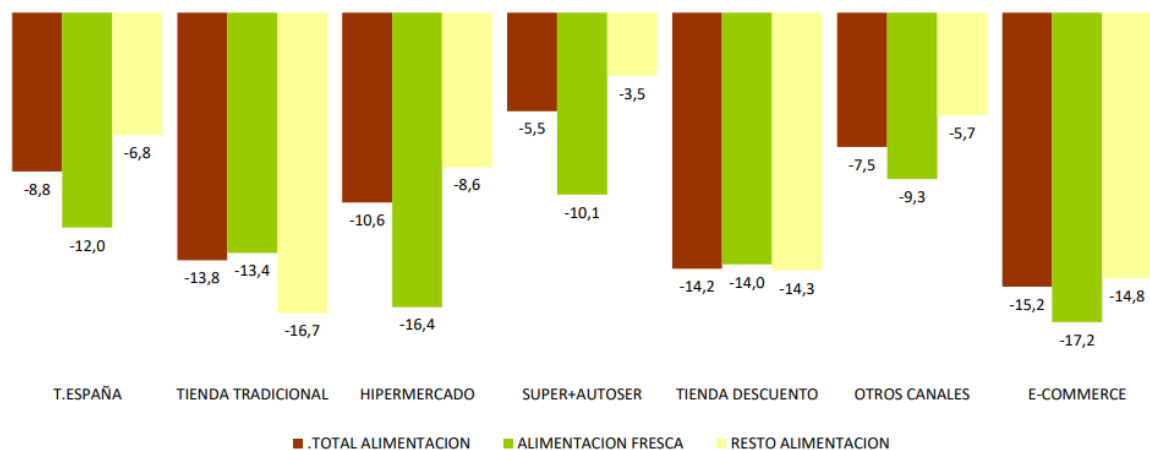
Spain

Focus on retail

Cuota de los lugares de compra en Volumen (kg/l)



% Evolución de Volumen (kg/l) en cada Lugar de Compra

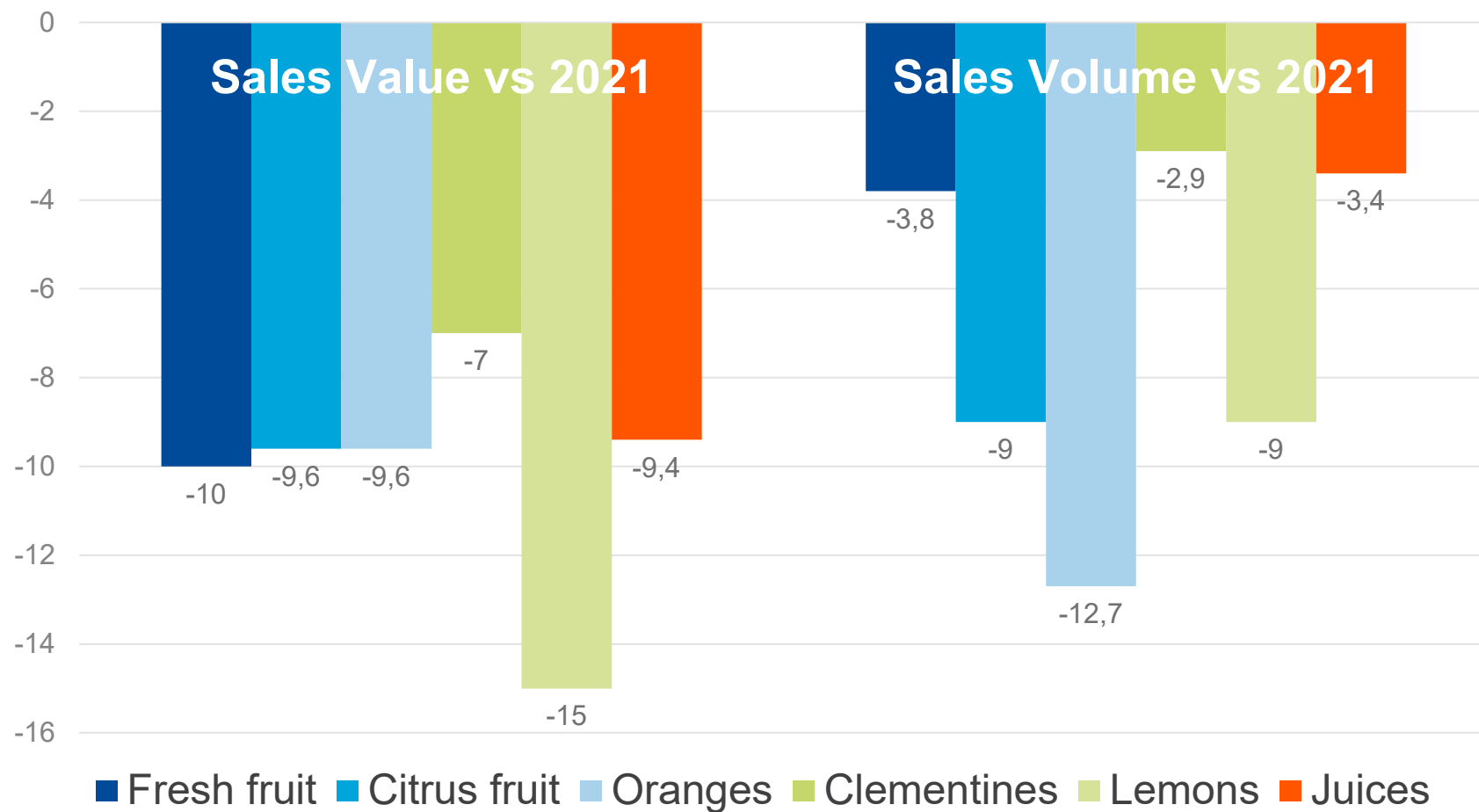


Source : MAPA



Spain

Fruit at-home consumption in 2022



Source : MAPA