

THE EU AGRICULTURAL OUTLOOK FOR WINE, OLIVE OIL AND FRUIT AND VEGETABLES MARKETS

Session 6

THE 2019
**EU AGRICULTURAL
OUTLOOK CONFERENCE**

Sustainability
from Farm
to Fork





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Asociación Española de Distribuidores,
Autoservicios y Supermercados

Food consumption trends: a view from the Spanish food retailers

Brussels - 11/12/19

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Members of ASEDAS



Main characteristics of ASEDAS members

310
companies

21.500 stores

Surface: 13 mill. of
m²

15 million people visit us every day

Sales: 60.000 billion
€

265.000 jobs

70% female employment

Store format: supermarket

Familiar, cooperatives,
and alliances of small
retailers

Core business: food

High levels of employment

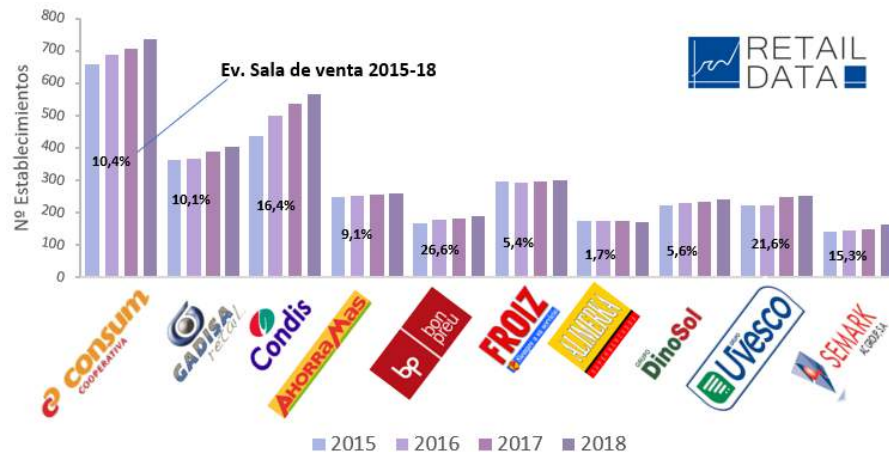
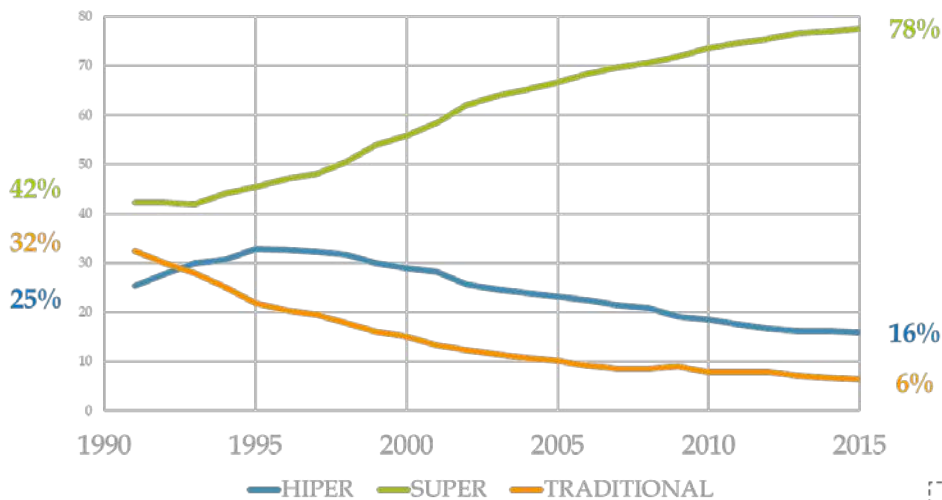
Proximity & convenience

Highly regionalized



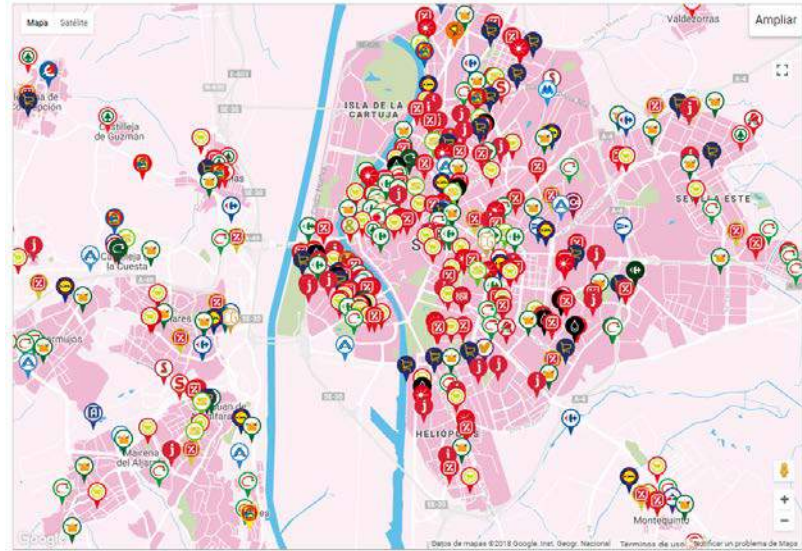
Evolution of regional retailers: members of national alliances

Share evolution by formats



Source: Nielsen, 2015

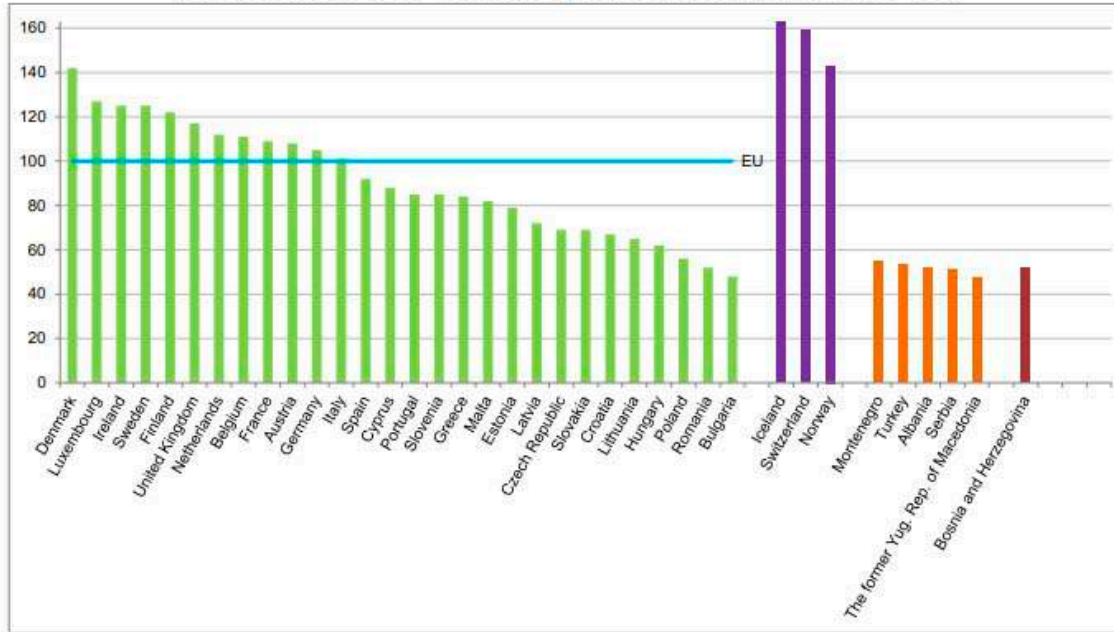
Supermarkets guarantee the access to food to all citizens



**Just 3% of people live in a place with no supermarket
99,9% can find a supermarket in less than 10 minutes**

One of the most efficient food retail systems in Europe

Price level indices for consumer goods and services, 2017 (EU=100)



These data on consumer price levels in 2017 come from an [article](#) published by Eurostat, the statistical office of the European Union.





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Consumption Trends



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Factors that determine the store selection made by consumers

	2010	2011	2012	2013	2014	2015	2016	2017
Proximity	45,1	40,4	50,9	47,8	54,5	56,7	64,8	63,3
Good prices	58,3	59,3	62,7	55,3	52,9	48,4	48,5	50,1
Quality of the products	67,2	66,7	51,9	64,1	59,9	66,3	56,7	44,6
Variety	28,7	28,0	21,9	19,4	21,7	22,3	28,0	41,1
Good promotions	20,2	14,6	17,5	13,7	14,5	15,5	14,1	25,9
Customer attendance	24,5	25,3	34,9	25,1	25,7	24,7	24,7	23,1
Variety of brands	13,4	11,5	11,7	8,1	8,9	4,8	12,2	18,8
Open time	2,8	2,8	7,7	3,9	3,1	2,9	4,9	9,0
Parking	3,2	5,1	6,9	3,0	3,1	3,3	6,7	6,4
Easy and fast shopping	4,0	4,3	4,3	2,9	3,5	3,6	6,8	5,1
Own Brand	2,3	3,0	1,6	2,3	1,5	2,1	2,1	3,5
Others	6,7	11,3	13,4	15,6	10,8	10,7	8,9	5,0
	2.402	2.600	1.500	1.500	1.500	1.500	1.500	1.500



Fuente: Nielsen ShopperTrends 2017



Big trends in fruit and vegetables



Families with kids pushing the consumption hard



Easy to eat, cook, prepare

Quality, warmth, taste and durability



The size cares: convenience

Low package:
sustainability



Big trends in fruit and vegetables

VEGETABLES

Type	%Quota	+/- Dif.
POTATOES	14,7%	+1,4 pp
ONIONS	7,9%	+0,7 pp
TOMATOES	15,6%	+0,2 pp

FRUITS

Type	%Cuota	+/- Dif.
AVOCADO	5,0%	+0,9 pp
STRAWBERRY	6,0%	+0,5 pp
FRUITS OF THE FOREST	2,8%	+0,4 pp



% Evolution

Value (€) oct - 2019

Fruits ▲ +2,0%

Vegetables ▲ +10,0%

Big trends in wine sector



New ways to present wine in supermarkets based on moments of consumption and trends

- With family and friends
- Classic wines
- To surprise somebody
- Our wines (local)



Big trends in wine sector

Sales assistant in wine section

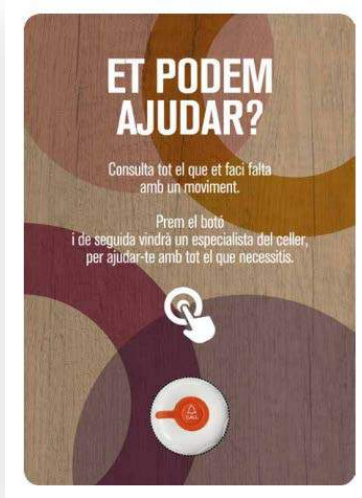
Improving wine culture



Separated location
and dedicated section



Organized testing sessions



Big trends in wine sector

WINE

Value (€)

Volume

Total Vino*



1.495 mio

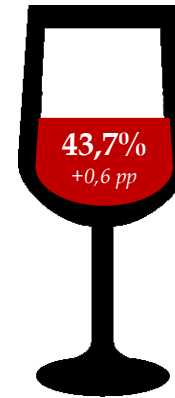
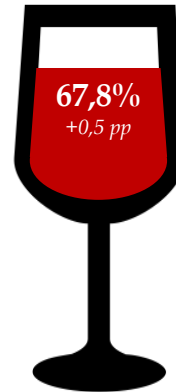
▲ +2,1%



465 mio

▼ -1,1%

% Quota Vine with D.O.



D.O wines are growing more

Source: nielsen

Total Spain | TAM October 2019
Hiper + Super

Big trends in olive oil sector



Specialization/differentiation is growing:
varieties, quality, package, first press, etc.

Good collaboration between
Interbranch and retailers



Responding to consumer demands





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Thank you for your
attention

#elgustoesnuestro

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