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

Stone Fruits Market Observatory

8 June 2020

EuroCommerce
for retail
& wholesale

General remarks

- Overall price level has remained stable or slightly up through covid crisis;
- Some companies have made commitments to block prices of daily items;
- There have been increases in the prices of certain fruits and vegetables; this is the result of higher production costs, seasonality, increased need for packaging, disruptions in the supply chain and higher costs by retailers (safety and security measures, absenteeism, more deliveries, etc.)

France - production

- As of 1 May 2020, the estimated **apricot production** for the 2020 season would fall by 30% over one year (exceptionally mild winter and then by spring frosts, particularly in the Rhône Valley and Provence). The European harvest is also estimated to be down sharply over one year.
- As of 1 May 2020, the 2020 annual **production of cherries** is expected to be higher than in the previous year, and in the average over 5 years. As cherries are a particularly sensitive fruit, early production estimates can quickly change according to possible climatic that may occur between now and harvest.
- As of May 1, 2020, **peach production would be 8% lower than in 2019 and 9% lower than the five-year** average. Flowering has been reduced as a result of a very mild winter and frost in the Rhone Valley. The production forecasts for peaches and nectarines are estimated from regional samples of quantitative and qualitative observations from multiple sources. They are published based on the assumption that the rest of the season will not experience any particular events that could affect the final harvest.

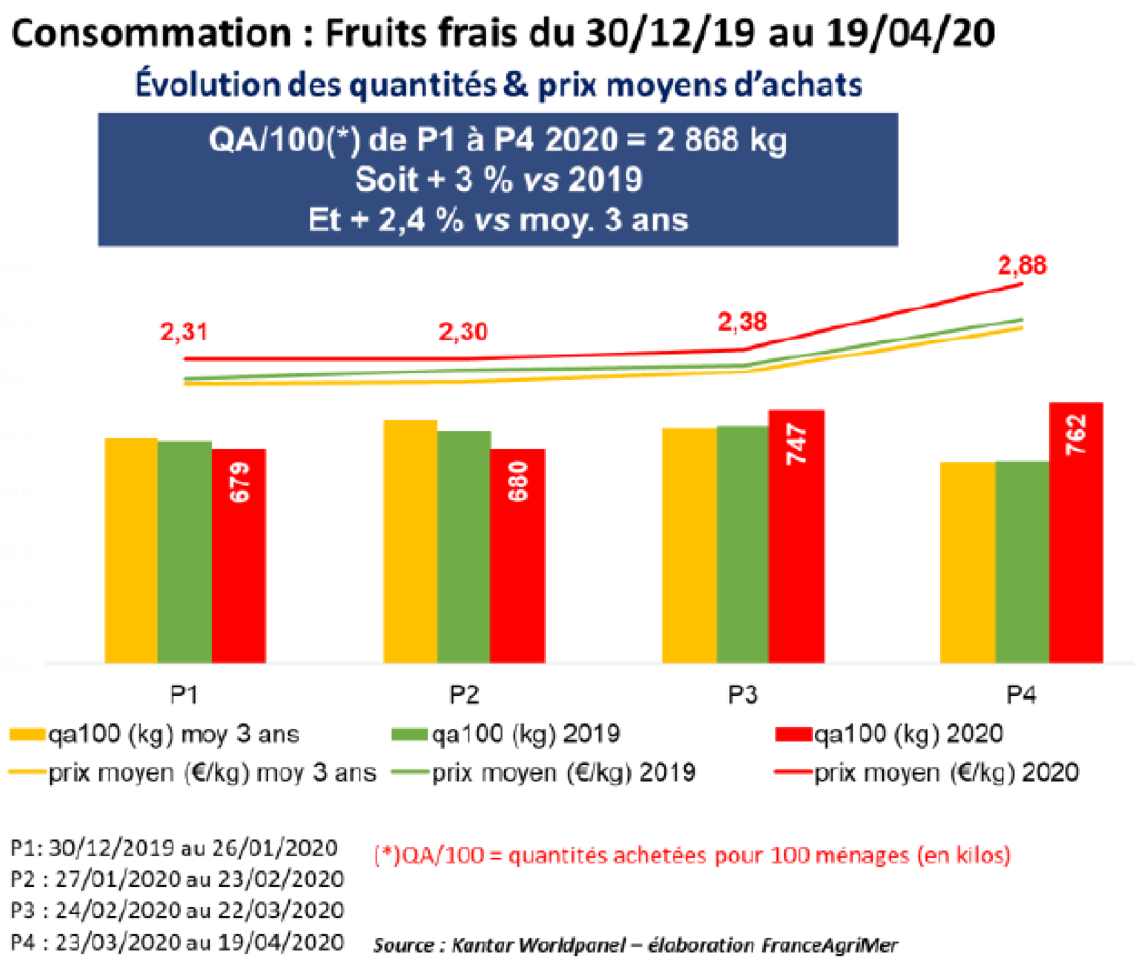
Source: France Agrimer

France

Fruits : consumption (at home consumption) : volumes on the rise, thanks to the lockdown period…

Fruits purchases by French households for home consumption amounted to 2,87 tonnes per 100 households, during the first 4 months of the year.

From 24/02/20 to 19/04/20, which includes part of the period of lockdown period (from 17 March 2020 - 11 May 2020), purchases of fresh fruit increased by +9.4% over 2019 and +9.8% over the average 3 years.



Source: Kantar Worldpanel - FAM

France

Fruits : segmentation in 2020

The first 6 categories account for 80% of purchases by volume. The first two categories of fruit consumed are apples and oranges.

	Quantités Achetées pour 100 ménages (en kg)		
	P1-P4 2019	P1-P4 2020	Var. %
Pomme	550,8	619,3	12,4
Orange	540,5	560,2	3,7
Banane	481,6	503,0	4,4
Clémentine Et Mandarine	406,8	383,0	-5,9
Poire	147,9	152,5	3,1
Kiwi	119,5	123,3	3,2
Total Fruits	**2783,8**	**2868,2**	**3,0**

Source : Kantar WorldPanel, élaboration FranceAgriMer

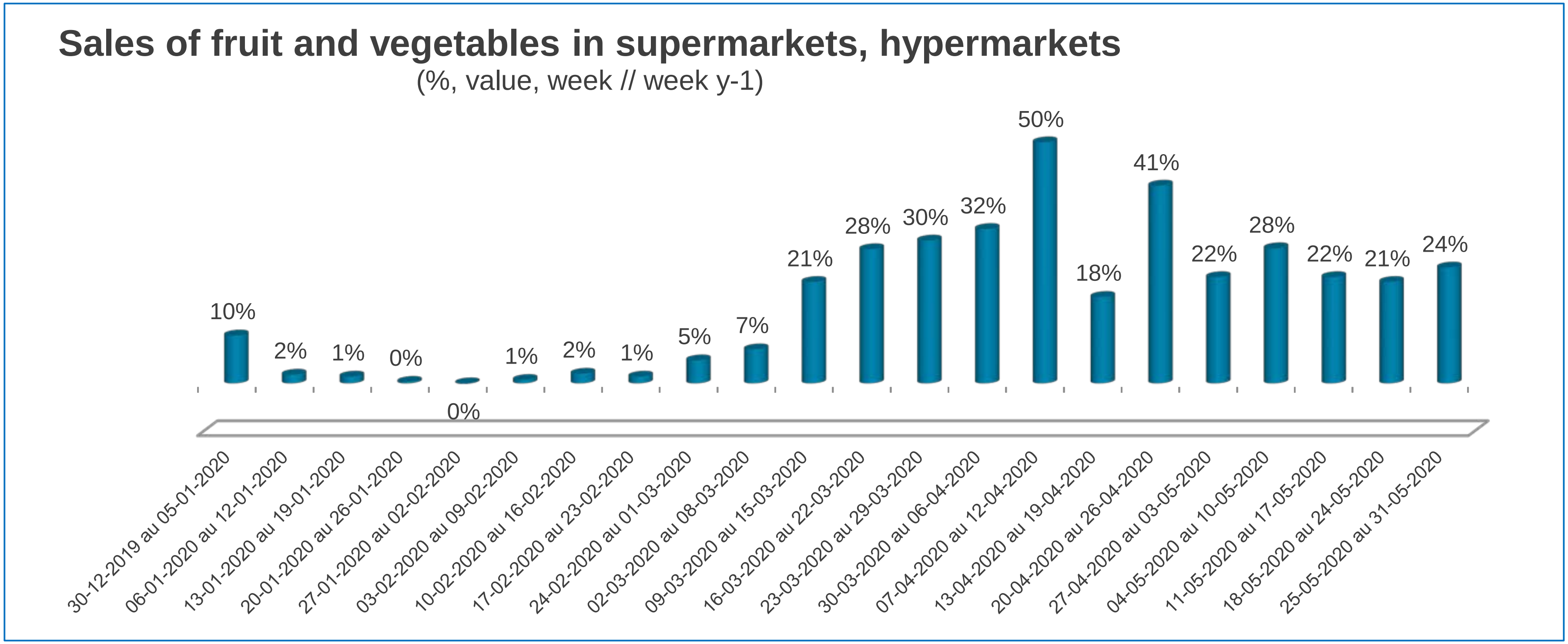
Source: Kantar Worldpanel

EuroCommerce

France

Fruit & vegetables : consumption (at home consumption) : a significant increase in sales of fruits and vegetables in HMSM during lockdown

The closure of canteens, restaurants and open-air markets led to a sharp increase in the supermarket sales of fruits & vegetables. Since 15 March, growth rates have averaged more than 20% in value.



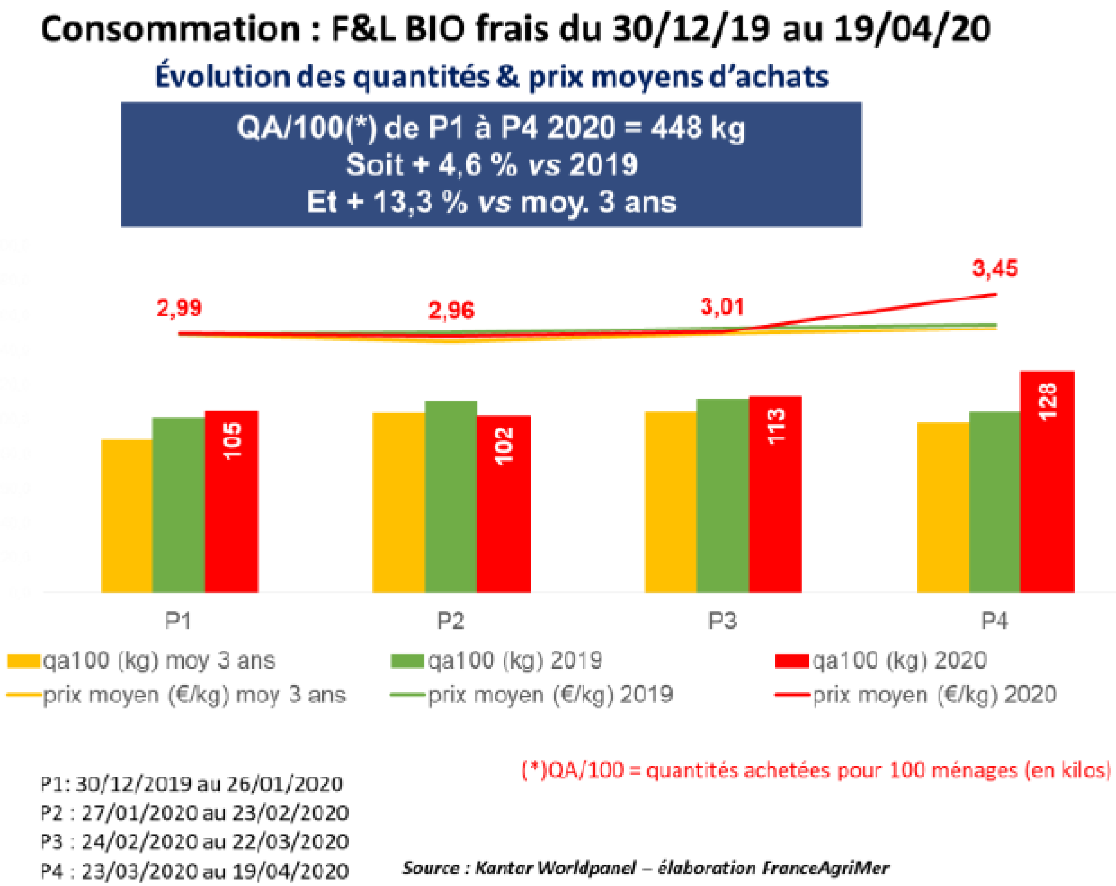
Source: IRI

France

Fruits & vegetables : organic (at home consumption) : jan-april 2020 : +4,6% vs 2019

Purchases of organic fruits and vegetables from French households are up 4.6% on the cumulative period P1-P4 compared to 2019.

This increase is more significant in the period P4 with +22.7% (vs. 2019).

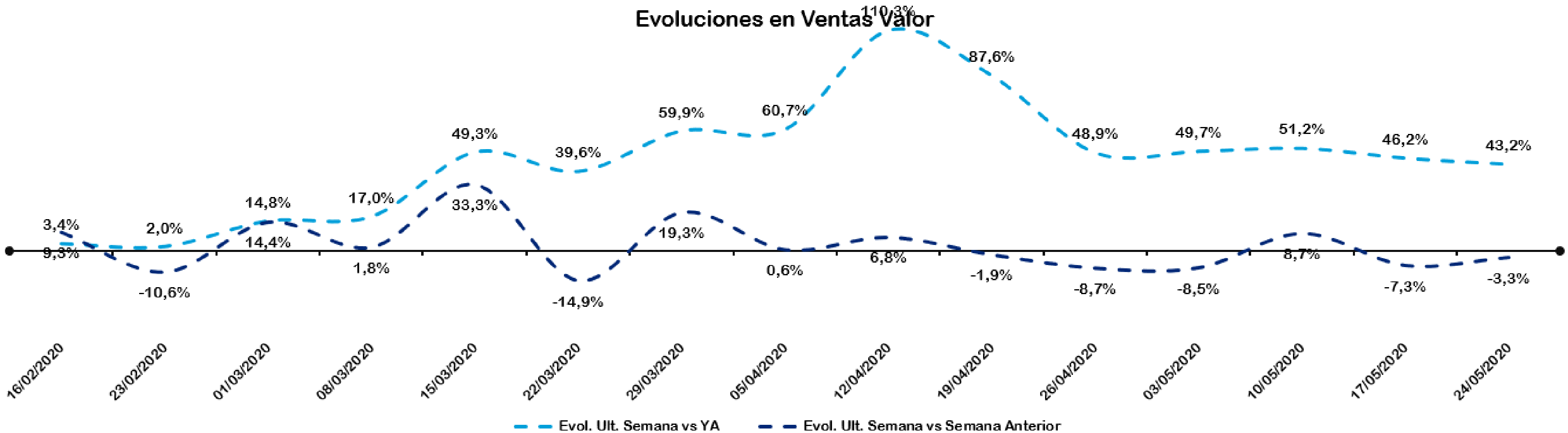


Source: Kantar Worldpanel - FAM

Spain

Sales evolution of fruits in Madrid area

CANALES	CCAA	DEPARTAMENTO	SECCION	FAMILIA	MF_MDD
TOTAL HIPER	MADRID	FRESCOS	FRUTAS	FRUTAS	MDD
SUPER PEQUEÑO	MURCIA	ALIMENTACION	MARISCO	ACC Y UTILES PERFU...	MF
SUPER MEDIANO	NAVARRA	BEBIDAS	PESCADO	ACEITES	
SUPER GRANDE	PAIS VASCO	DROGUERIA Y LIMPIEZA	QUESOS	ACEITUNAS Y ENCUR...	
PDM	VALENCIA	PERFUMERIA E HIGIENE	VERDURAS Y HORTA...	AGUAS	



*Nota: La venta realizada bajo peso variable sin código EAN, tanto la venta asistida como de libre servicio, no se incluye en el informe.

Volver al inicio

Spain
Weekly sales evolution, by category

% Evolucion volumen semana 21 (del 18 de mayo al 24 de mayo de 2020)

	% Evol. Semana 17 vs misma semana año 2019	% Evol. Semana 18 vs misma semana año 2019	% Evol. Semana 19 vs misma semana año 2019	% Evol. Semana 20 vs misma semana año 2019	% Evol. Semana 21 vs misma semana año 2019	% Evol. Semana 21 vs. 20
TOTAL ALIMENTACION	**24,3%**	**27,0%**	**30,6%**	**27,0%**	**19,2%**	**-0,8%**
TOTAL CARNE	27,2%	29,3%	29,9%	32,8%	22,7%	-2,9%
CARNE VACUNO	24,6%	29,9%	21,9%	36,7%	21,2%	-5,8%
CARNE POLLO	30,6%	31,5%	33,0%	29,6%	32,1%	3,4%
CARNE CERDO	43,1%	42,7%	36,2%	39,3%	31,8%	-4,1%
CARNE OVINO	35,6%	65,2%	64,5%	40,4%	53,2%	-5,4%
CARNE DE CONEJO	26,3%	6,7%	9,6%	29,4%	-6,1%	-12,4%
OTRAS CARNES	22,7%	25,1%	42,3%	21,2%	14,7%	-3,6%
CARNES TRANSFORMADAS	12,1%	12,3%	18,8%	28,5%	8,1%	-8,3%
TOTAL PESCA	18,5%	31,7%	38,7%	28,3%	25,2%	4,3%
PESCADOS FRESCOS	21,4%	33,0%	32,4%	25,9%	24,0%	6,4%
PESCADOS CONGELADOS	25,8%	40,9%	67,0%	37,7%	37,8%	6,6%
CONSERVAS PESCADO/MOLUSCO	3,0%	13,2%	33,4%	35,3%	23,0%	-0,5%
T.FRUTAS FRESCAS	27,3%	36,6%	26,1%	16,5%	13,9%	4,8%
T HORTALIZAS Y PATATAS FRESCAS	32,1%	44,0%	36,8%	34,0%	22,2%	-4,7%
FRUTAS Y HORTALIZAS TRANSFORMAD	25,2%	24,1%	37,9%	35,4%	26,5%	1,0%
PAN	17,0%	19,1%	21,5%	17,4%	7,9%	-2,8%
TOTAL ACEITE	13,5%	28,4%	29,1%	29,8%	19,8%	-5,8%
T.HUEVOS	39,1%	49,0%	42,1%	41,8%	30,8%	-6,9%
LECHE + DERIVADOS LACTEOS	8,9%	13,7%	16,1%	22,7%	9,1%	-6,1%
T VINOS Y BEBIDAS DERIVADAS DEL	58,1%	37,4%	67,2%	64,5%	21,5%	-3,4%
AGUA DE BEBIDA ENVAS.	29,3%	11,6%	41,8%	17,6%	25,2%	8,2%
T.BEBIDAS ESPIRITUOSA	112,5%	83,4%	69,6%	111,5%	103,2%	19,1%
GASEOSAS Y BEBID.REFR	20,0%	11,9%	28,6%	23,4%	25,0%	4,6%
CERVEZAS	51,2%	60,6%	78,4%	60,7%	54,2%	4,1%
LEGUMBRES	31,8%	42,2%	29,8%	30,3%	24,6%	-6,3%