

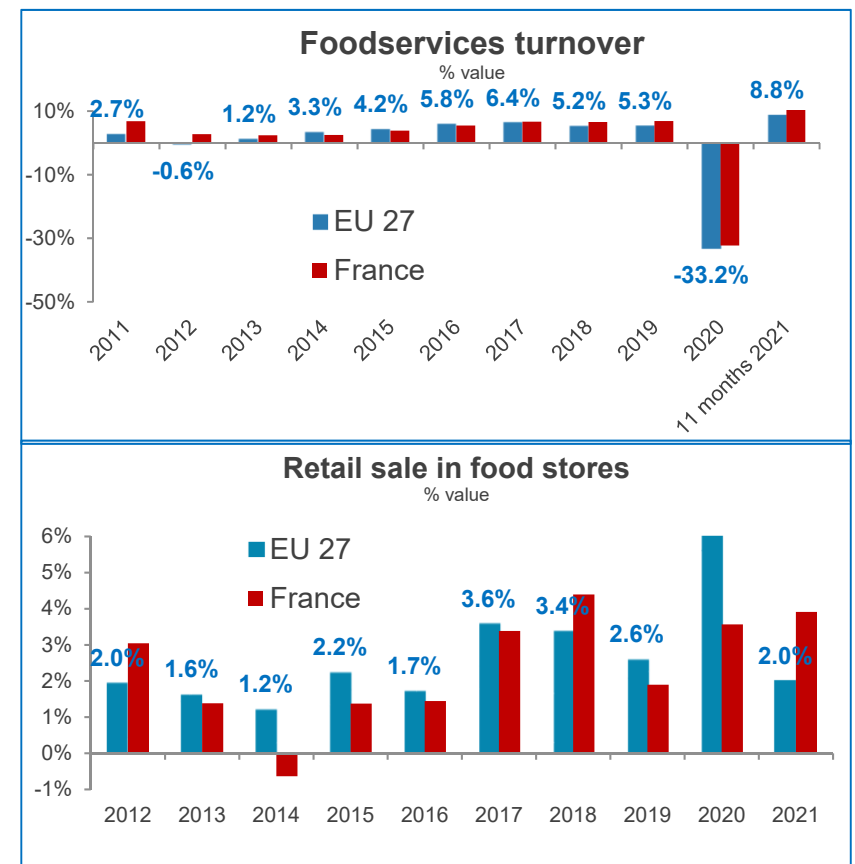
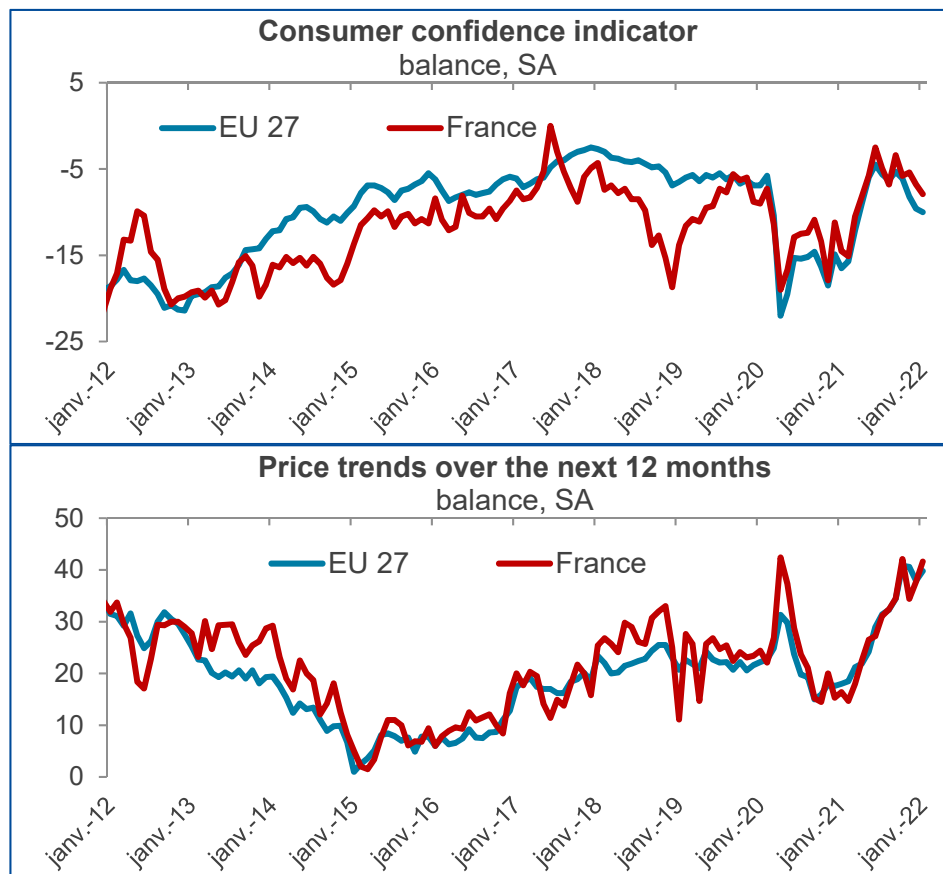
# TRENDS IN SALES OF FRUIT – A RETAIL PERSPECTIVE

**Pip Fruit Market Observatory**  
**8 March 2022**

# France & EU

## Economic context

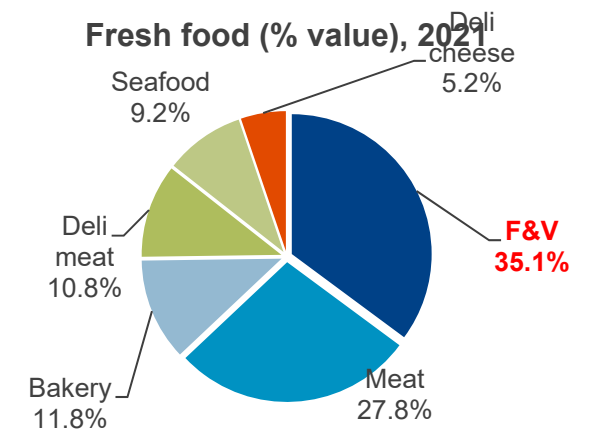
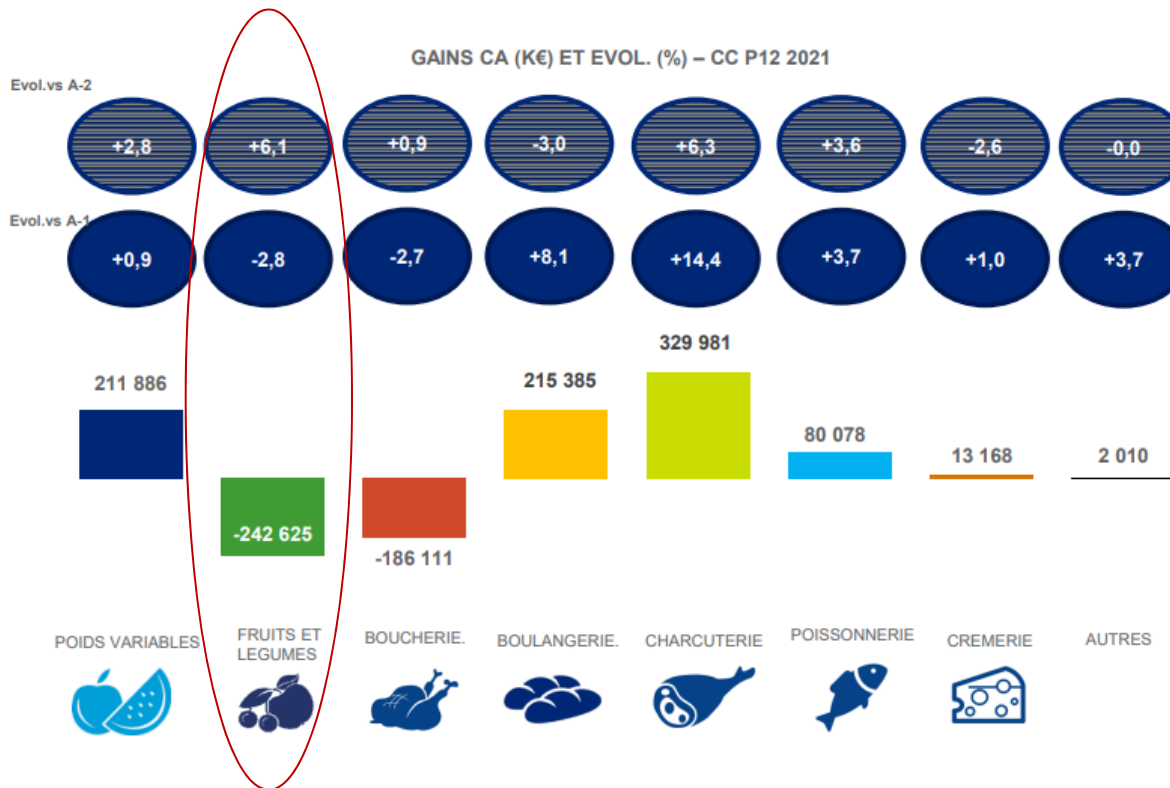
- ① Household confidence in Europe has been shrinking in recent months. Households continue to anticipate price increases in the coming months.
- ② In terms of retail channels, the sales of non-specialised food retailers continued to grow. At the same time, foodservice sales have returned to growth in 2021, but their level remains below that of 2019.



Source : Eurostat

# France

## Focus on fresh food in hypermarkets and supermarkets



# France

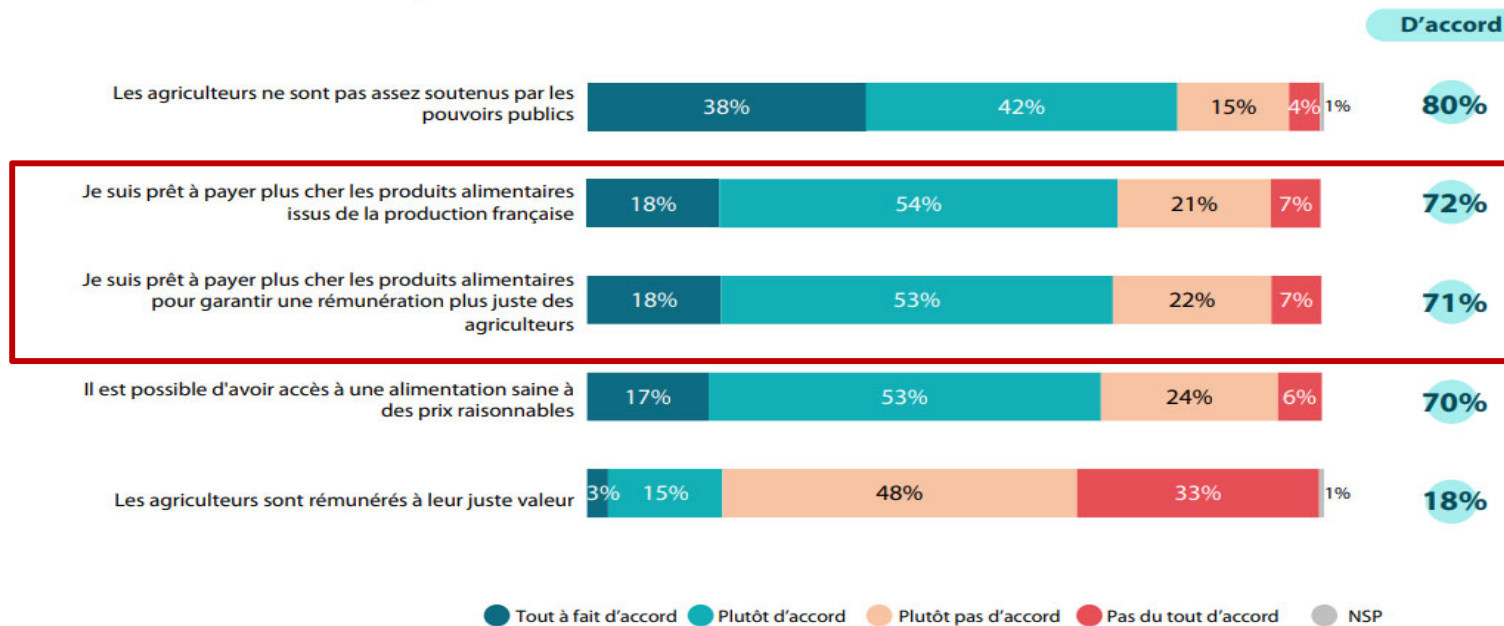
## French consumers' expectations (1)

According to an OpinionWay survey published in early February 2022, more than 70% of French consumers say they are willing to pay more for food products from French production and also to pay more for food products to ensure a fair remuneration for farmers.



### La perception des agriculteurs et de leur travail

Q. Êtes-vous d'accord ou pas d'accord avec chacune des affirmations suivantes ?



“opinionway pour CALIF”

Source : OpinionWay « Les Français, l'agriculture et l'alimentation » – février 2022

# France

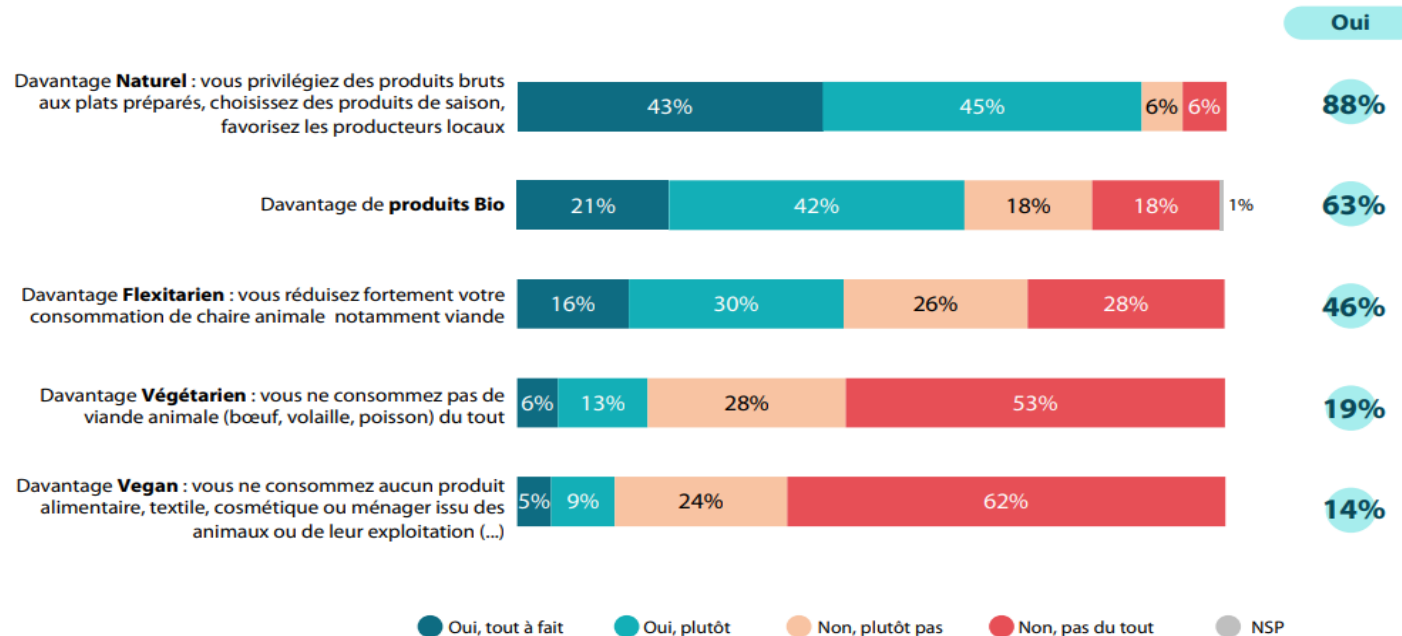
## French consumers' expectations (2)

French consumers are waiting for "natural" (they would prefer raw products to prepared meals, seasonal products, local producers). They would also like to consume more organic products (63% of positive responses).



### Le régime alimentaire préféré à l'avenir

Q. Demain, vous aimeriez manger... ?

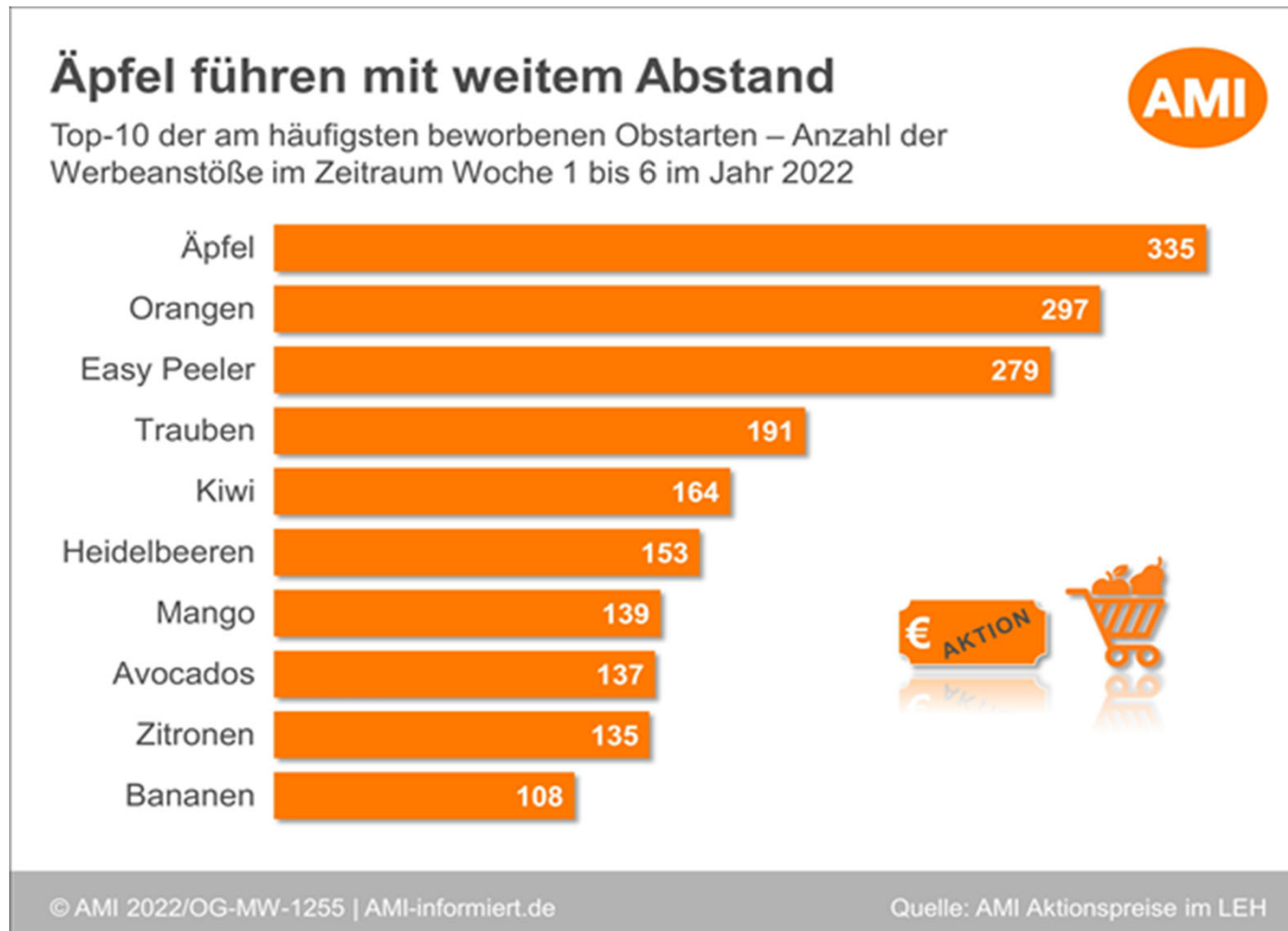


"opinionway pour CALIF

Source : OpinionWay « Les Français, l'agriculture et l'alimentation » – février 2022

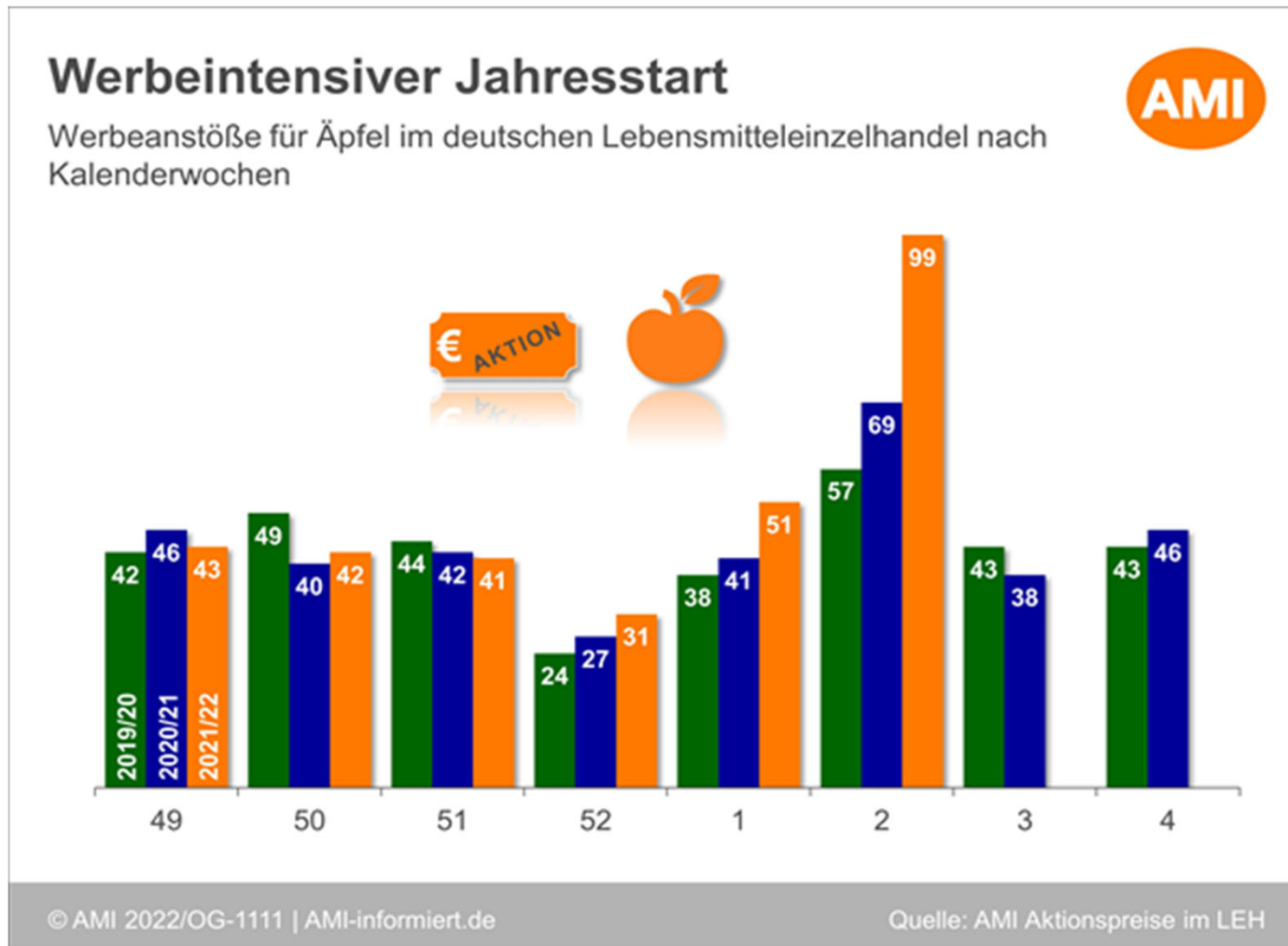
# Germany

## Promotional campaigns for fruit in German retailers in early 2022



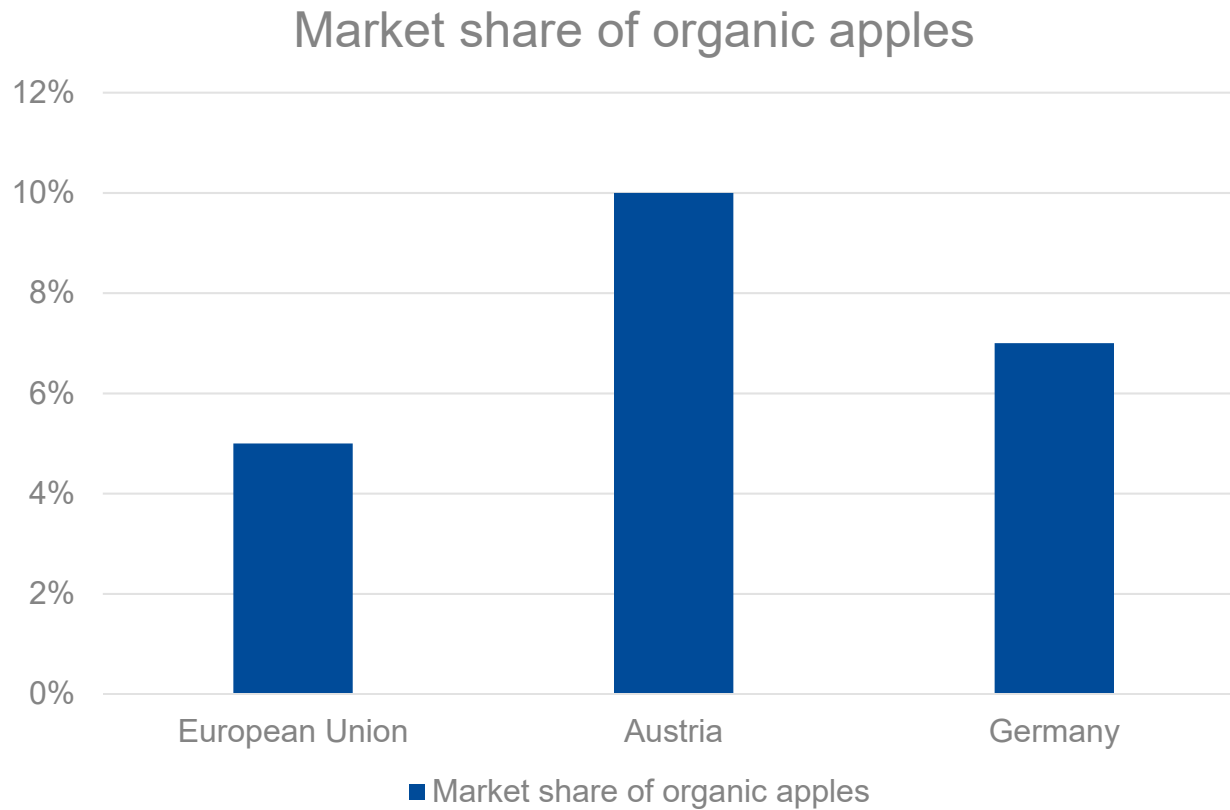
# Germany

## Promotional campaigns for apples in German retailers in early 2022



# Germany

## Organic apples in Germany and Europe

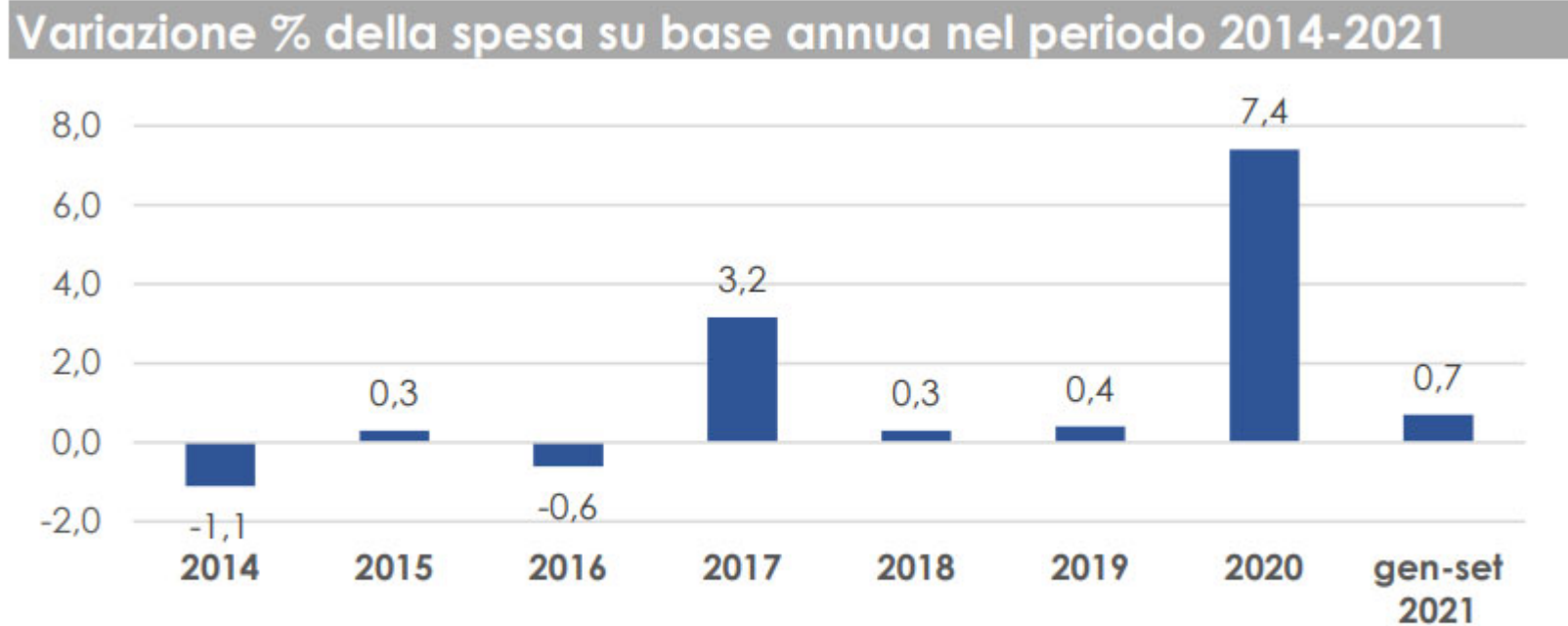




# Italy

## Household food consumption

After the boom of 2020, growth in household **food consumption** has slowed significantly in 2021.

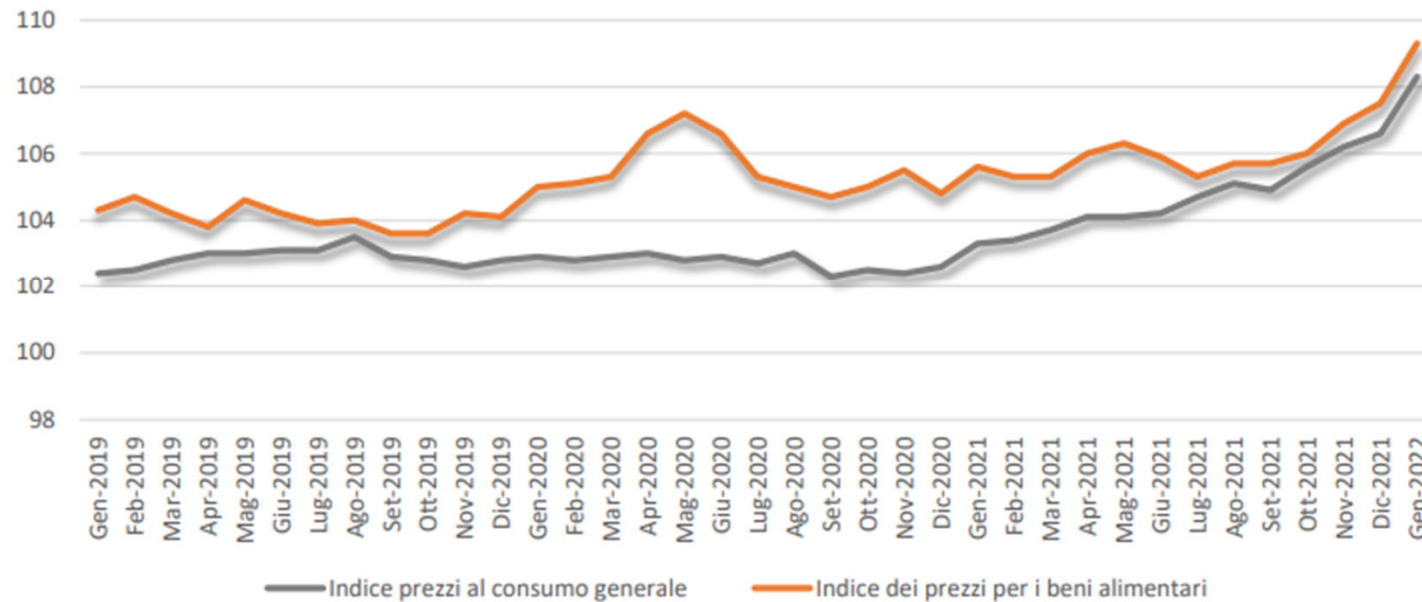


Fonte: Elaborazioni Ismea-Nielsen

# Italy

## Inflation

Gli indici di prezzo al consumo per l'intera collettività dei beni alimentari e totali



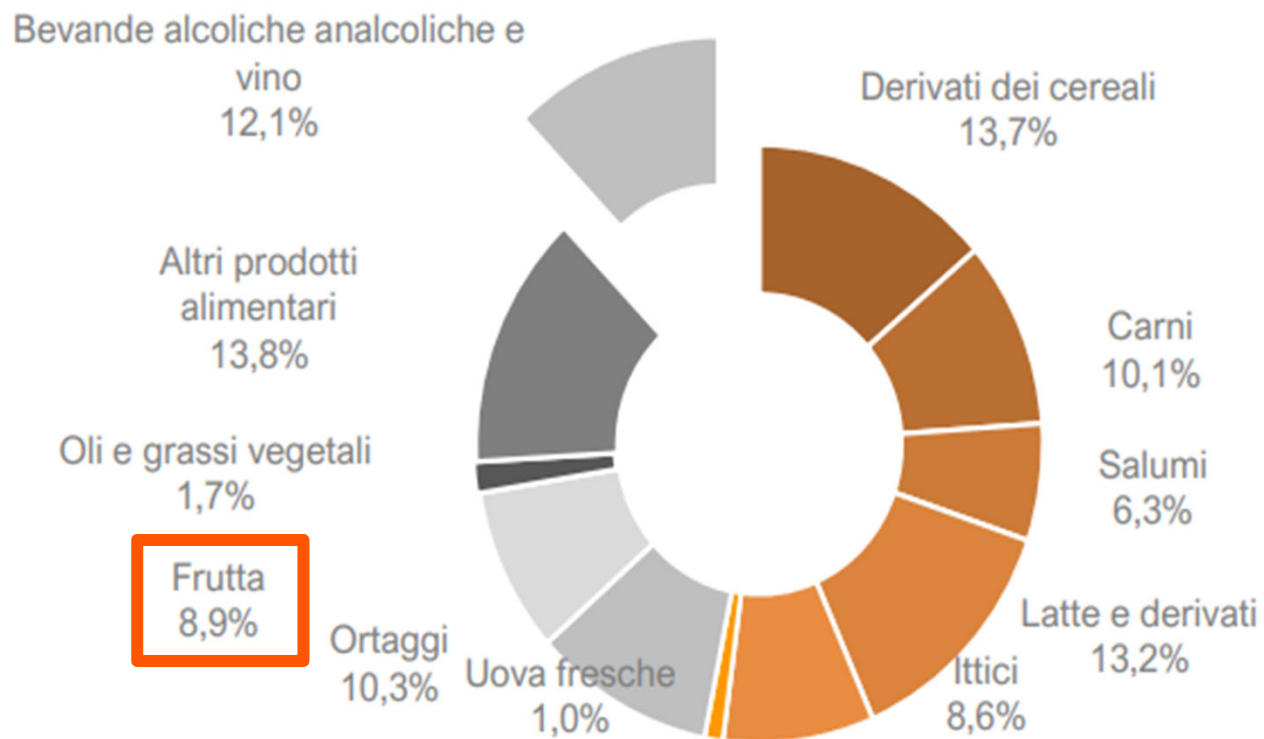
Highest inflation since 2012

+10% for certain products such as pasta, pears, oil and a number of vegetables

# Italy

## The shopping trolley in 2021

### Composizione dello scontrino nel 2021

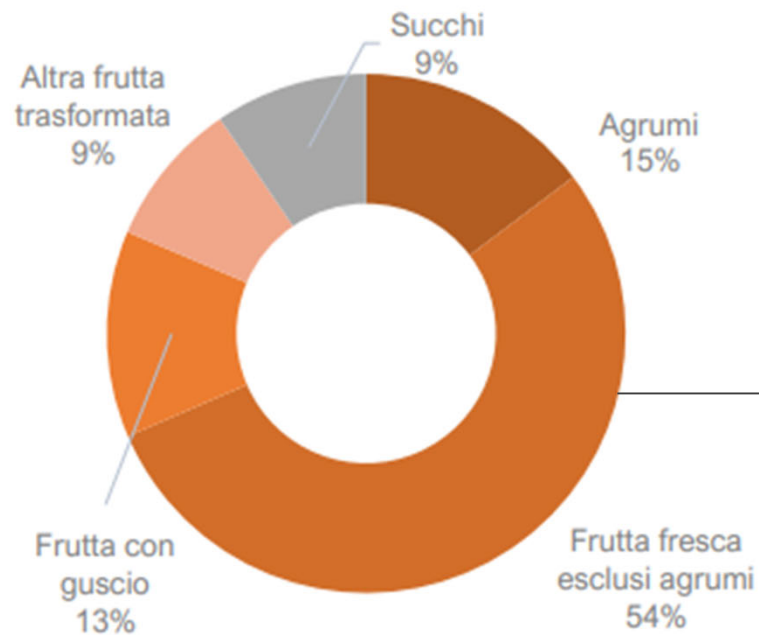


Fonte: elaborazioni Ismea su dati Nielsen

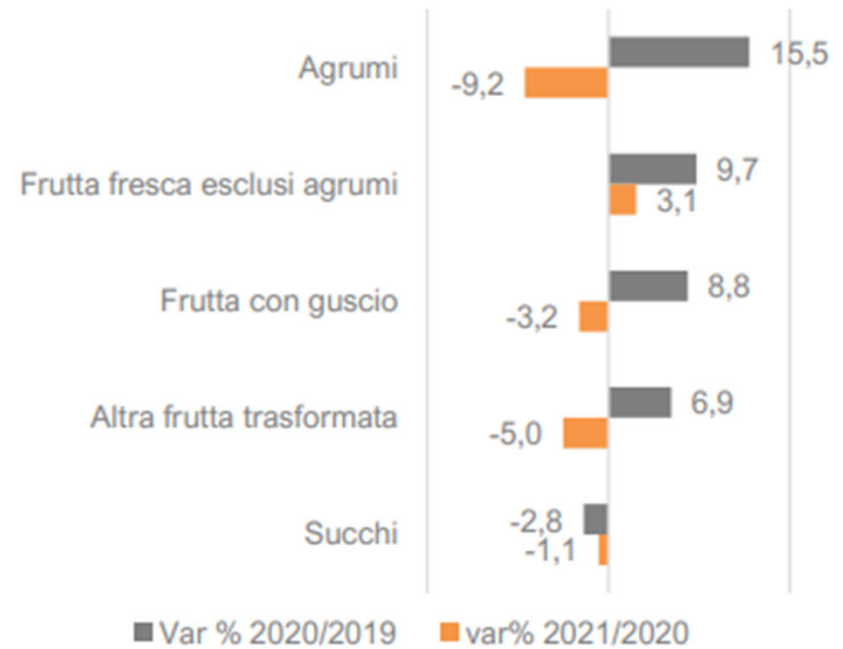
# Italy

## Fruit volumes

### Frutta - Peso su segmento e variazione su base annua



Fonte: elaborazioni Ismea su dati Nielsen



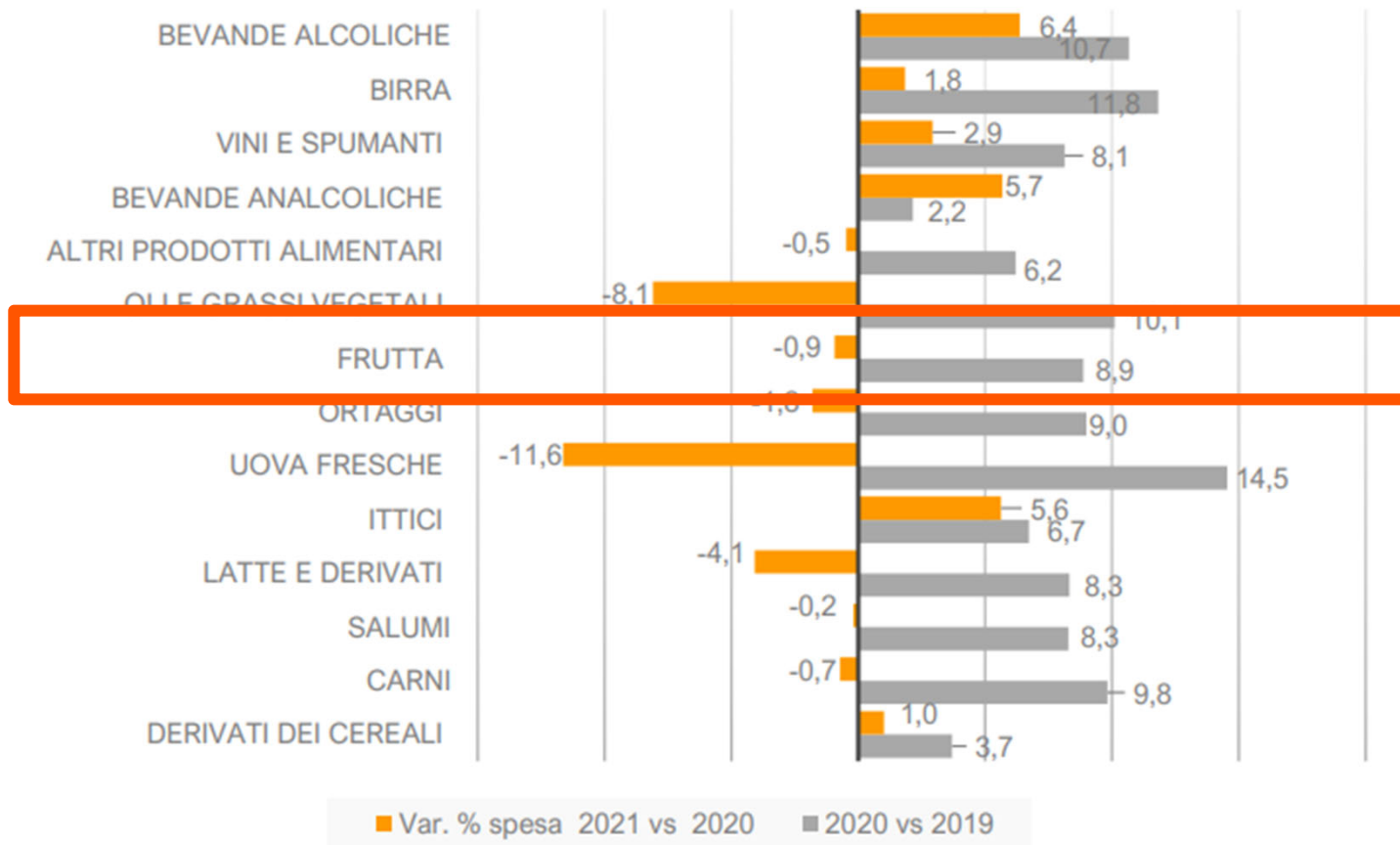
Apples: 15%

Apples sales in 2021: -9% in volume (-6% in value)

# Italy

## Fruit sales variation

Variazione % di spesa dei vari comparti su base annua

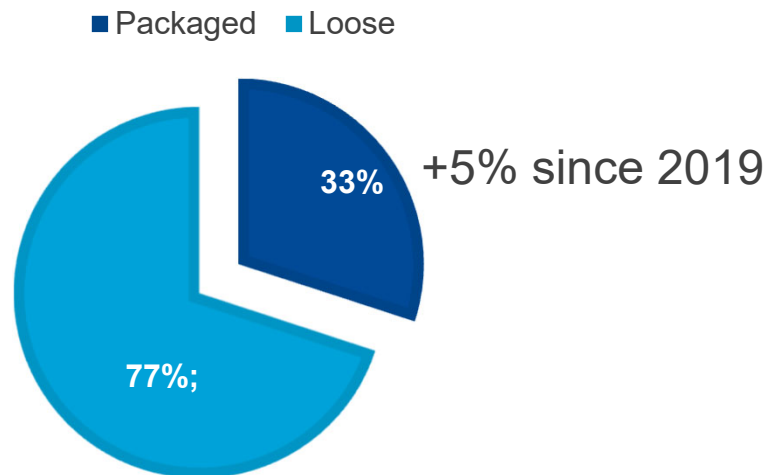


# Italy

Focus on apples and pears

	December 2021	Variation % with December 2020
Pears	€2,65	+32,3
Apples	€1,51	-0,7%

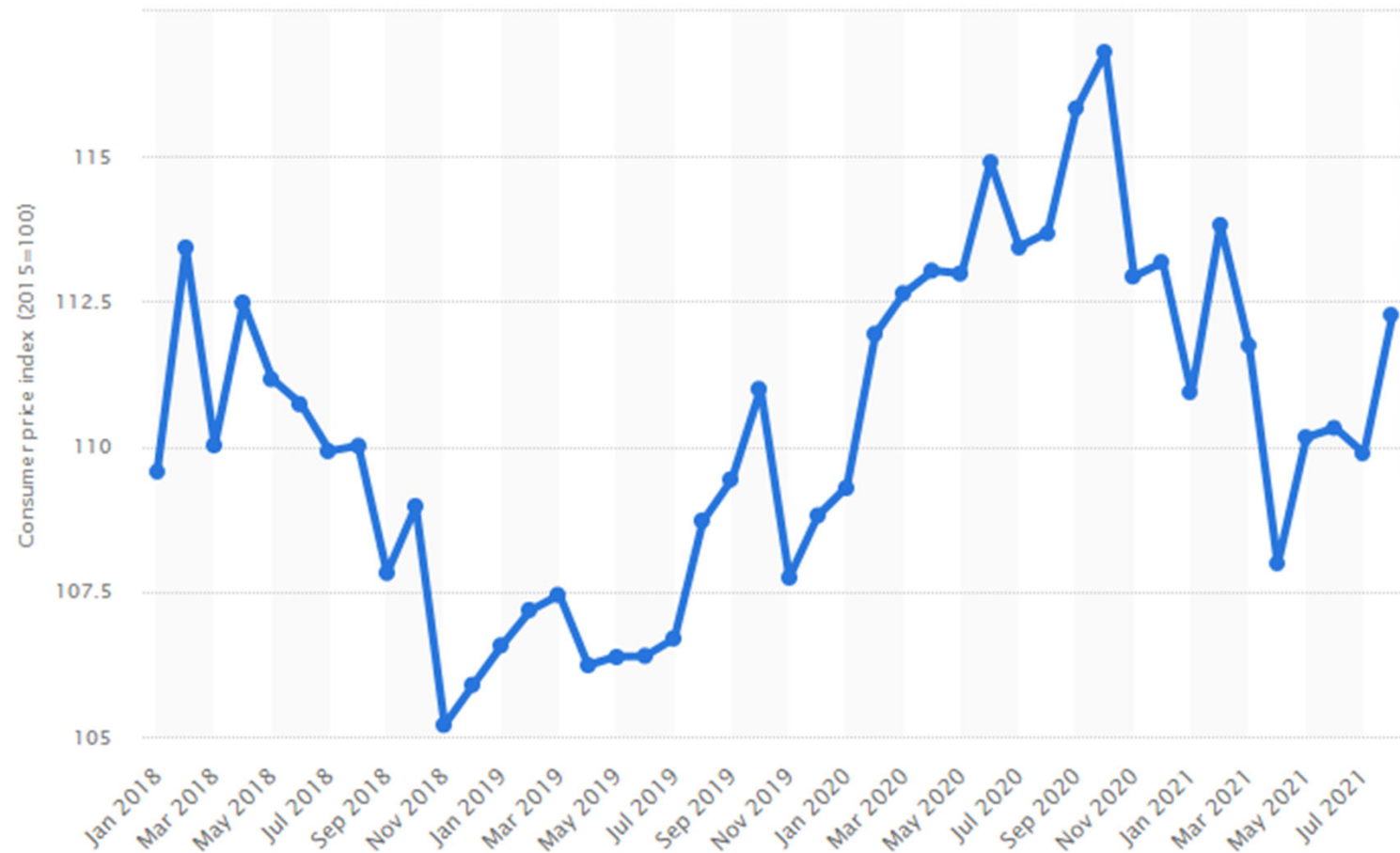
## SALES OF PACKAGED APPLES



**Organic: 1,2% of apple sales**

# Netherlands

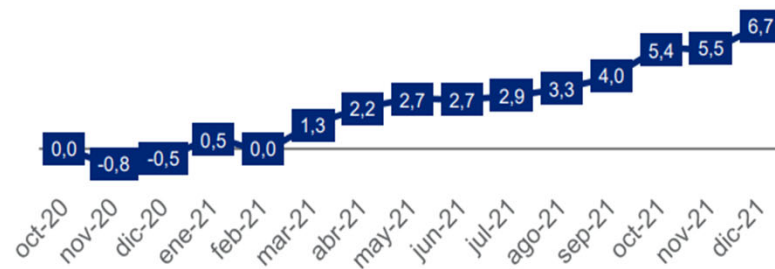
## retail price evolution



# Spain

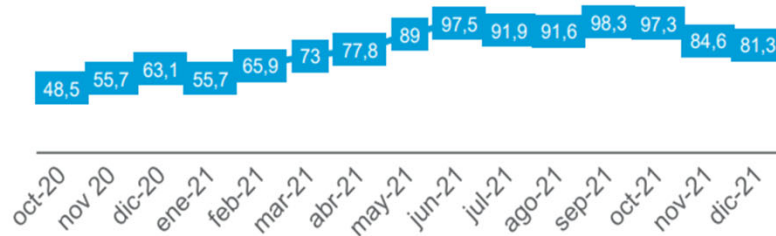
## Macroeconomics indicators

### EVOLUCIÓN ÍNDICE DE PRECIOS AL CONSUMO

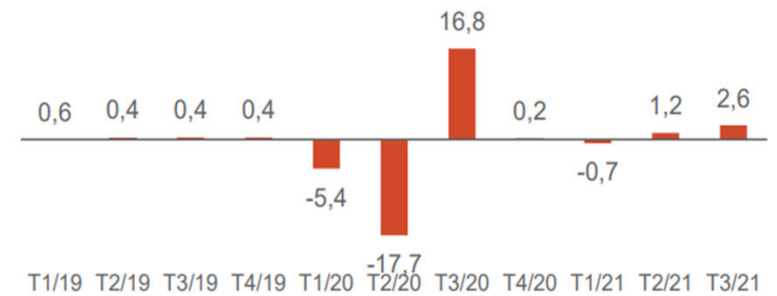


Fuente INE

### ÍNDICE DE CONFIANZA DEL CONSUMIDOR



### EVOLUCIÓN PRODUCTO INTERIOR BRUTO



Fuente INE (Tasa trimestral)

### TASA DE DESEMPLEO




Source: IRI



# Spain


## Evolution in value (I)

Evolución en valor vs. YA y vs. 2YA- YTD




ALIMENTACIÓN

	YTD 21 vs. 20	YTD 21 vs. 19
	-0,6%	7,8%
ALIMENTACION SECA	0,5%	9,4%
CONSERVAS	-5,9%	3,4%
CONGELADOS	-2,6%	11,5%
DERIVADOS LACTEOS	-3,0%	1,8%
PRODUCTOS 4-5 GAMA	10,4%	8,1%
HUEVOS	-2,3%	6,1%



FRESCOS

	YTD 21 vs. 20	YTD 21 vs. 19
CARNE	-3,5%	7,7%
CHARCUTERIA	-0,7%	4,7%
FRUTAS	-1,7%	10,2%
VERDURAS Y HORTALIZAS	-6,5%	4,8%
QUESOS	-0,8%	8,5%
PESCADO	-1,1%	6,0%
MARISCO	-3,4%	2,2%



BEBIDAS


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

Source: IRI, data : November 2021


# Spain

## Evolution in value (II)


Evolución en valor vs. YA y vs. 2YA- TAM



	TAM 21 vs. 20	TAM 21 vs. 19
<b>ALIMENTACIÓN</b>	-0,1%	7,7%
ALIMENTACION SECA	0,9%	9,2%
CONSERVAS	-5,2%	3,4%
CONGELADOS	-1,7%	11,8%
DERIVADOS LACTEOS	-2,4%	2,0%
PRODUCTOS 4-5 GAMA	9,2%	7,8%
HUEVOS	-2,0%	5,4%



	TAM 21 vs. 20	TAM 21 vs. 19
<b>FRESCOS</b>	-1,8%	7,2%
CARNE	-2,6%	8,0%
CHARCUTERIA	-0,4%	4,9%
FRUTAS	-1,4%	10,4%
VERDURAS Y HORTALIZAS	-5,5%	5,5%
QUESOS	-0,2%	9,0%
PESCADO	-0,1%	6,5%
MARISCO	-1,3%	3,2%



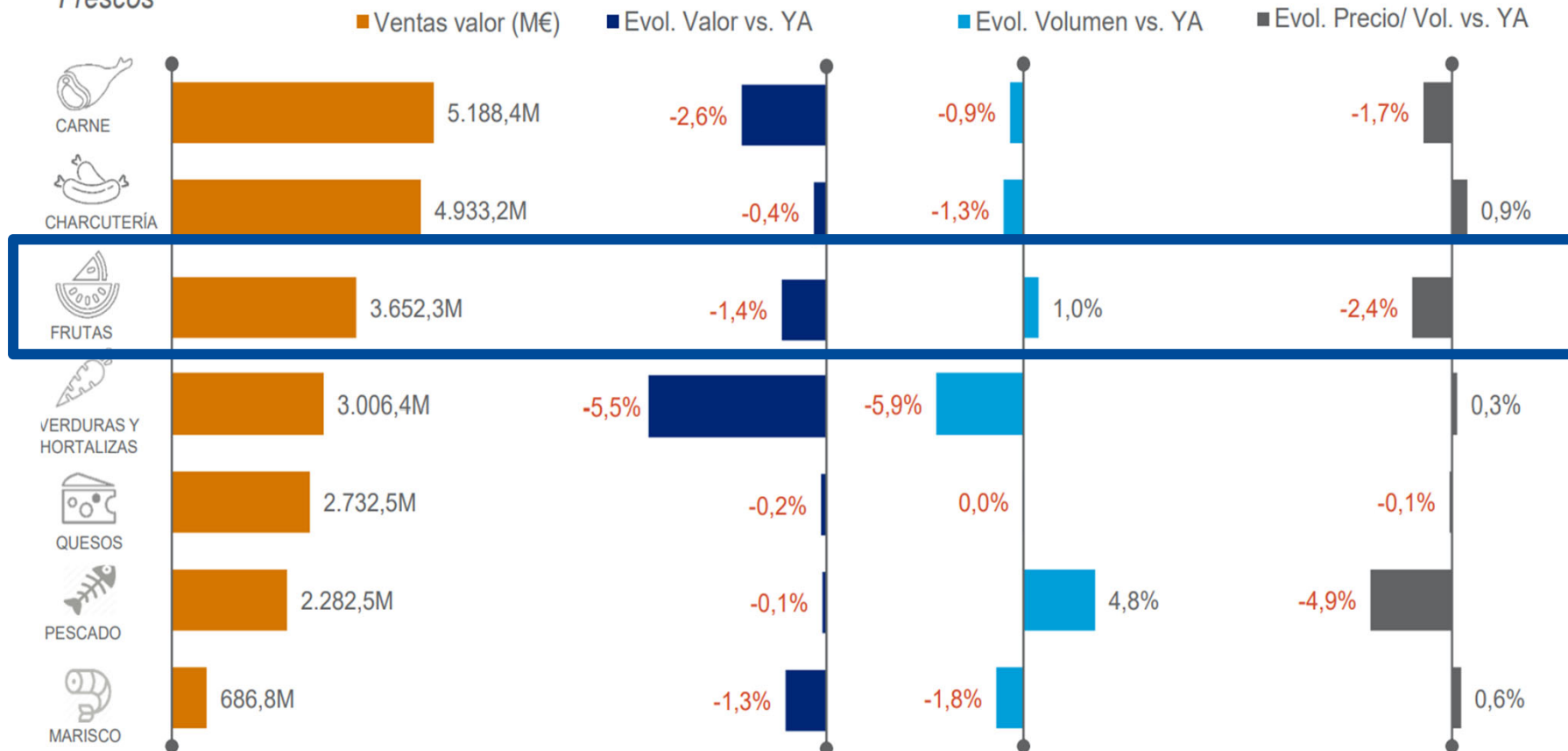
	TAM 21 vs. 20	TAM 21 vs. 19
<b>BEBIDAS</b>	1,7%	8,7%
LECHES Y BATIDOS	-2,5%	1,6%
CERVEZAS	0,3%	19,8%
BEBIDAS REFRESCANTES	6,2%	10,2%
VINOS	-2,3%	9,3%
BEBIDAS ESPIRITUOSAS	9,3%	14,9%
AGUAS	2,7%	2,1%
ZUMOS	3,1%	-6,9%
BEBIDAS VEGETALES	2,2%	14,3%
ESPUMOSOS	3,8%	4,1%

Source: IRI, November 2021

# Spain

## KPIs

### Frescos

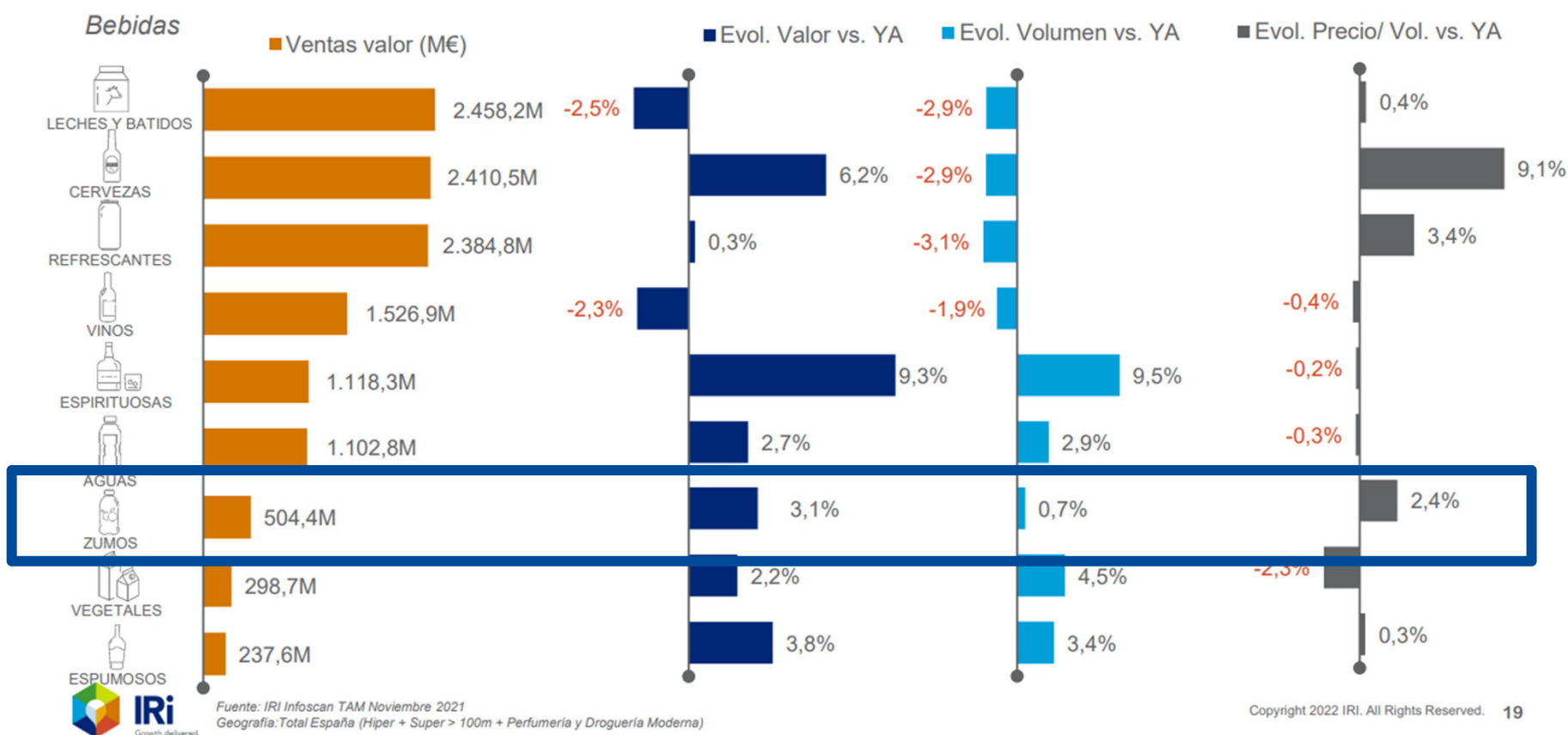


Source: IRI, nov 2021

# Spain

## KPIs

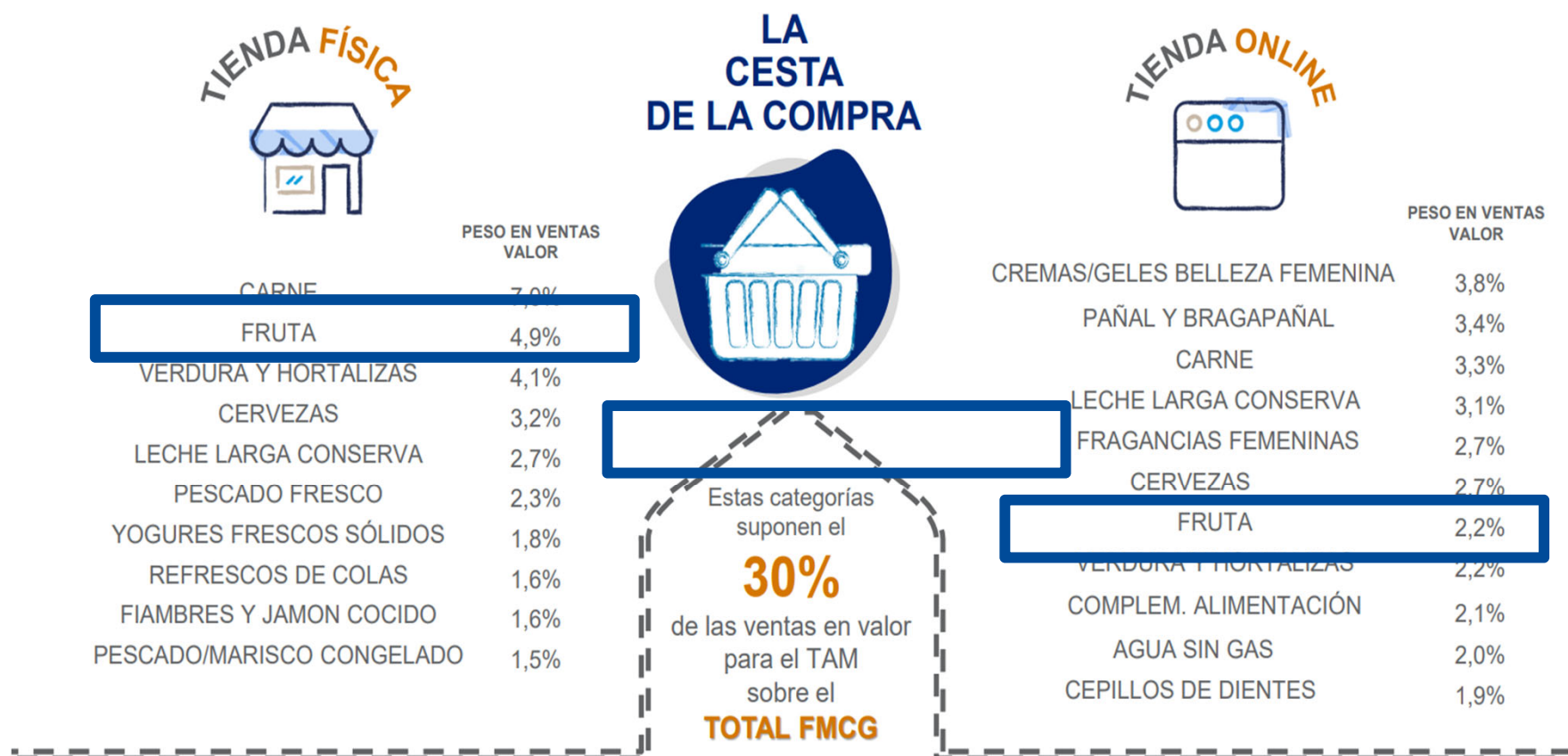
### Visión general del Gran Consumo: Evolución de los principales KPI's por sección



# Spain

## offline vs online

### Análisis de la cesta de la compra física vs. online



Source: IRI, nov 2021