

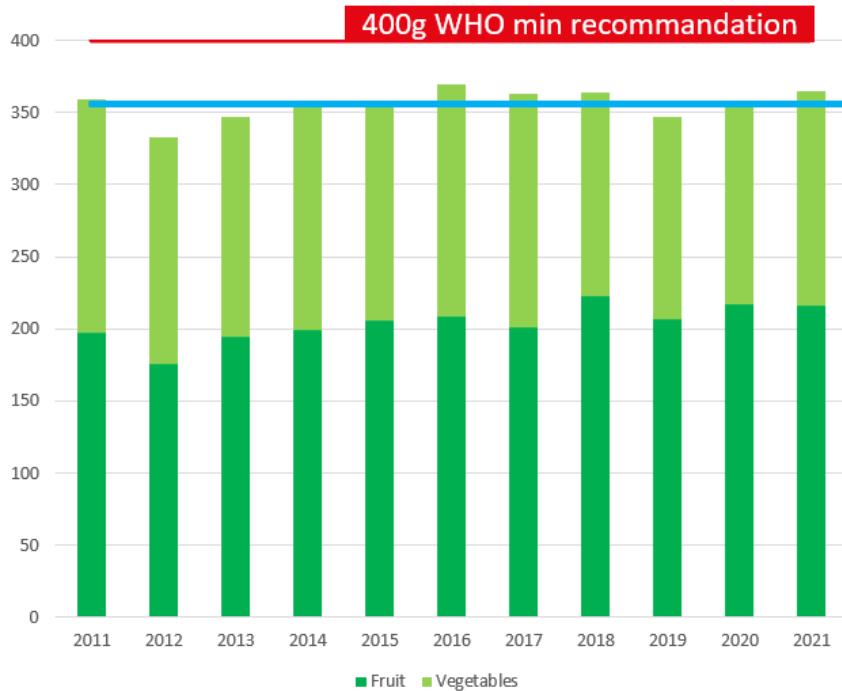


Apple consumption in Europe

Freshfel – WAPA

6 November 2023

EU F&V consumption at a glance



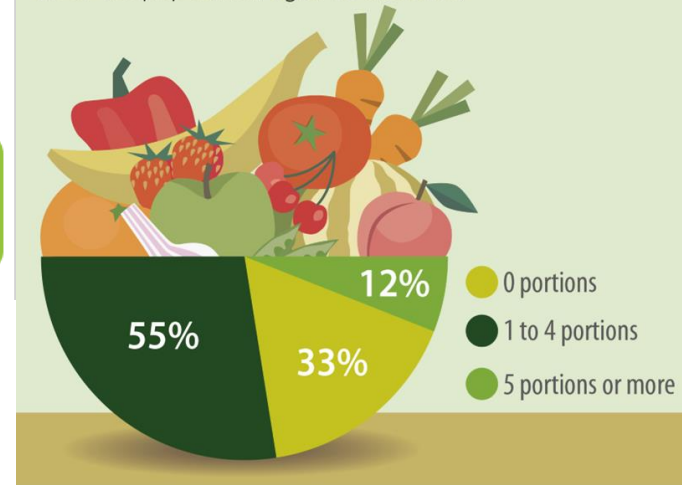
	2021	2020
Fruit	215,79	216,26
Vegetables	148,80	140,50
Total	364,58	356,77

CONSUMPTION: 2,2%
2020/2021

1,3%
2016-20/2021



**Daily consumption of
fruit & vegetables in the EU, 2019**
(% of the population aged 15 and over)



EU F&V consumption at a glance

Background on F&V consumption trends

- Below minimum recommendations:
 - WHO : min 400 gr for health and nutrition
 - Nordic and EGEA scientists : up to 800 gr for health and environment
- Sector loses the pandemic benefits due to:
 - Back to normal life
 - Consequences of inflation impacting purchasing power
- Heavy competition from agri-food sector:
 - Misuse of fresh produce image for their benefits
 - Agrifood marketing budget equivalent to total fresh produce turnover
- Still negative unfair attitude from many stakeholders
 - NGO on PPP/MRL and other sustainability aspects
 - Media on F&V prices in time of inflation
 - Incoherent policy leading to more obstacles for consumption

Incoherence of EU strategy and policies

- F&V are part to the solution of the GD, F2F and EU beating cancer plan, but this need to be supported by a robust action plan with positive discrimination for F&V
- Reality is different:
 - Focus in F2F on plant based diet instead of plant diet
 - Discriminatory packaging policy that will generate less consumption ,less marketing , endanger quality more food loss , limit sales and prevent segmentation for the benefit of all other food product not targeted
 - Promotion policy leading to a decline of F&V budget and marketing stop and go, contradicting to basic promotion principles
 - Fight of cancer and NCD : Role of F&V prevention not referred to plan

Europe Union

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	13.055.851	10.578.006	10.495.520	11.833.864	11.795.859	-0,32%	2,65%
Processing (t)	5.374.950	3.624.820	3.622.410	4.686.400	4.838.200	3,24%	11,81%
Extra-EU imports (t)	247.076	272.853	241.110	288.715	161.799	-43,96%	-38,35%
Extra-EU exports (t)	1.357.141	1.142.804	1.088.438	1.155.076	1.023.143	-11,42%	-13,72%
Fresh net supply (t)	6.570.835	6.083.235	6.025.782	6.281.103	6.096.315	-2,94%	-2,31%
Population	425.553.926	425.828.909	426.686.364	426.166.978	425.885.240	-0,07%	-0,04%
Consumption (kg/year/capita)	15,44	14,29	14,12	14,74	14,31	-2,88%	-2,27%



Apples (fresh and processed if by far the largest category within the fruit sector



Erosion of the share of apples within the fruit segment

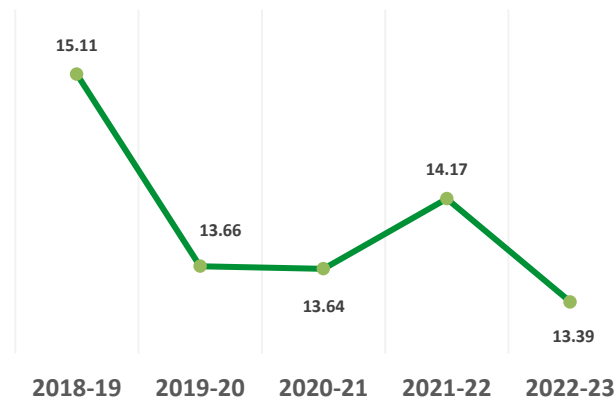


Increase competition within the fruit segment (berries, kiwi, exotics,..)

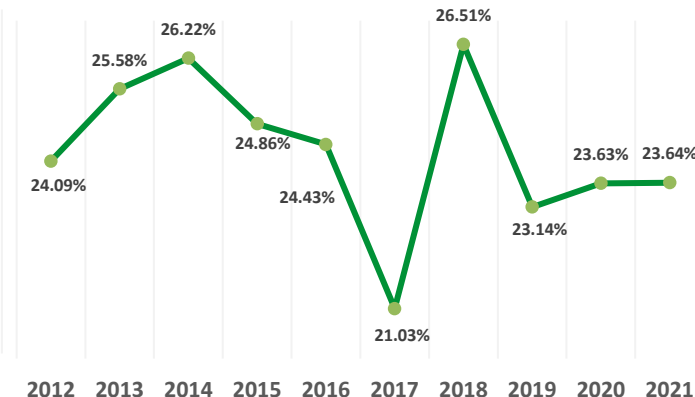


Competition of agrifood products

Apple consumption (kg/year/capita)



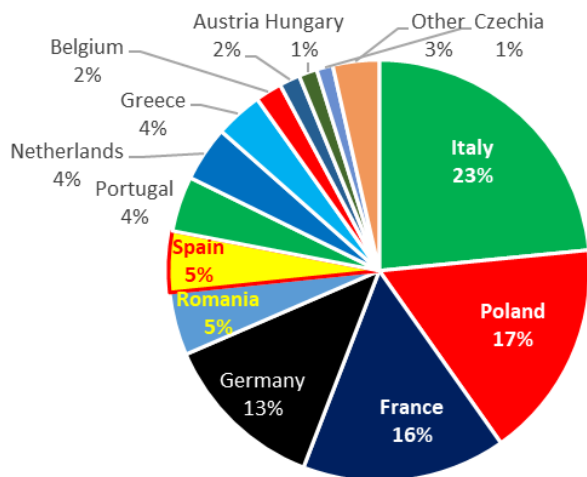
Apple & pear consumption (% of total fruit consumption)



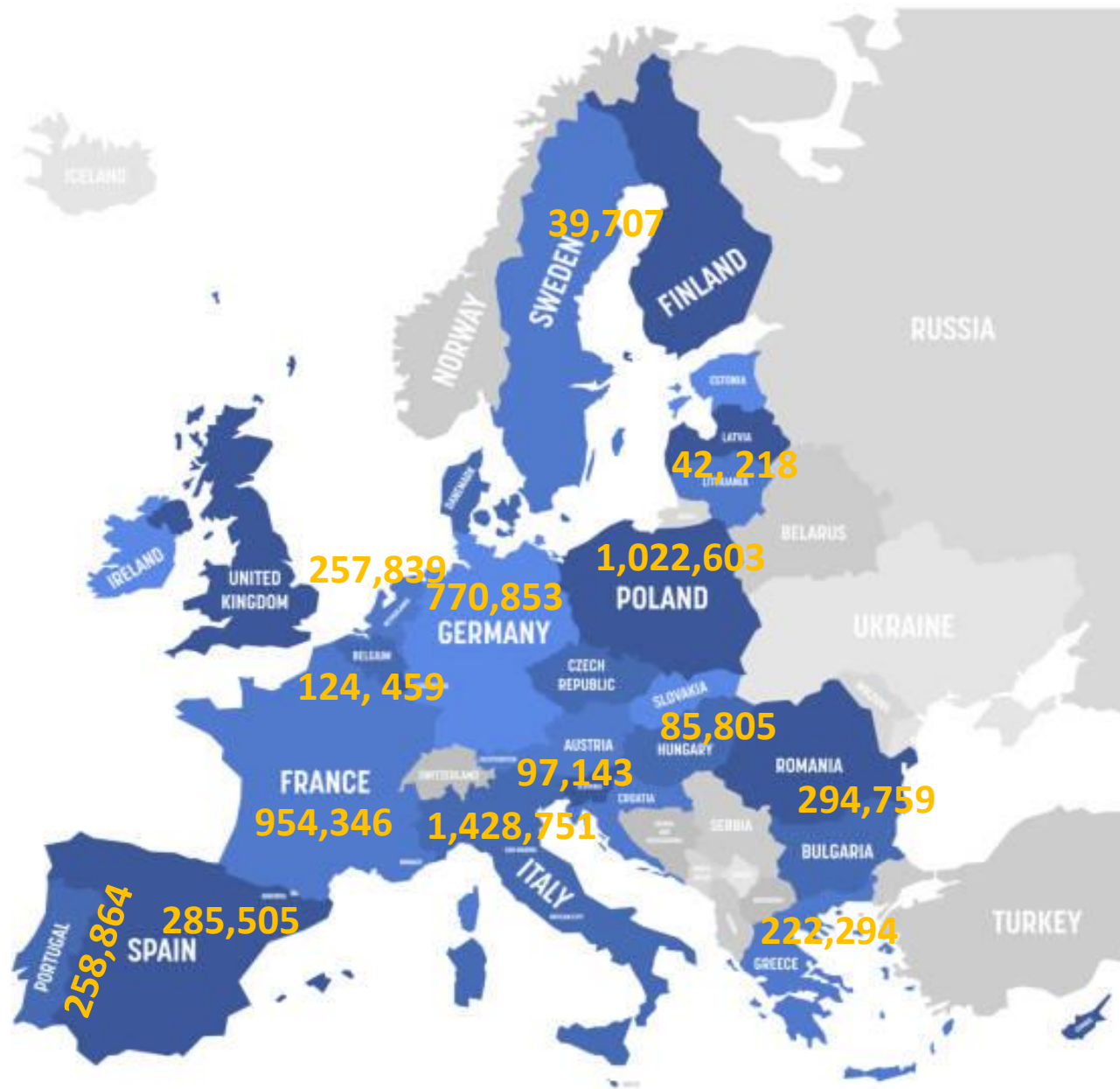


Europe Union

EU fresh/table apples market
> 6 Mio T



Fresh market in T	
EU	6.096.315
Italy	1.428.751
Poland	1.022.603
France	954.346
Germany	770.853
Romania	294.759
Spain	285.505
Portugal	258.864
Netherlands	257.839
Greece	222.294
Belgium	124.459
Austria	97.143
Hungary	85.805
Czechia	76.050
Lithuania	42.218
Croatia	40.066
Sweden	39.707
Slovenia	35.122
Slovakia	32.126
Denmark	22.983
Latvia	4.821





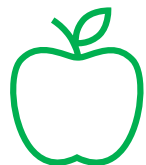
Europe Union



Still wide differences in among MS consumption level , the highest in the main production MS



Progressive permanent last decade(s) => decline of apples consumption but penetration rate remain high > 80%



Sector's segmentation commitment => adapt varieties to consumers's taste & texture and GAP to climate stress



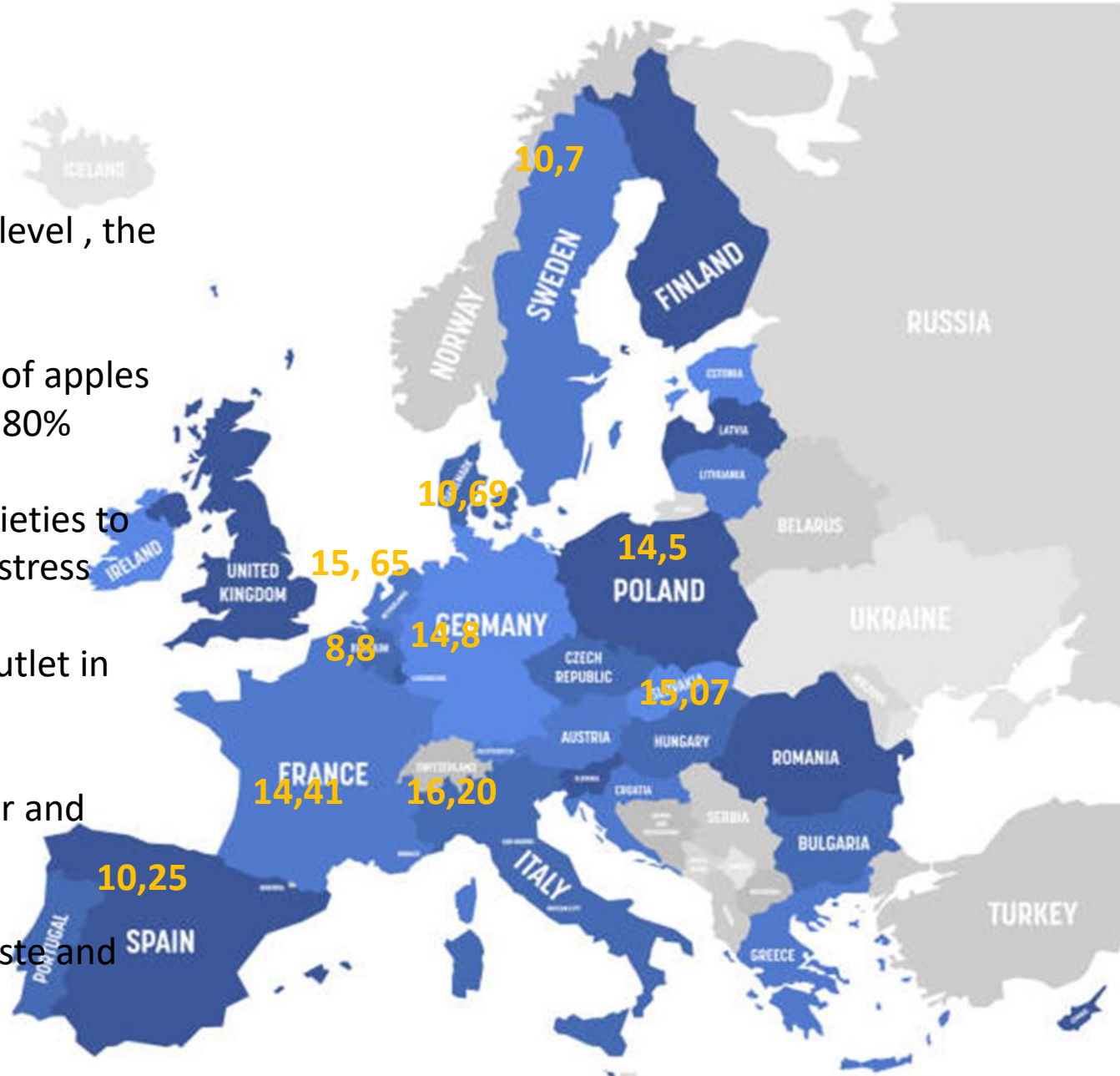
Need market diversification as snacks => f new outlet in food services, school, on the go eating , at work



Drop of organic sales => unbalance between offer and demand



More marketing efforts => find out consumers taste and consumers location

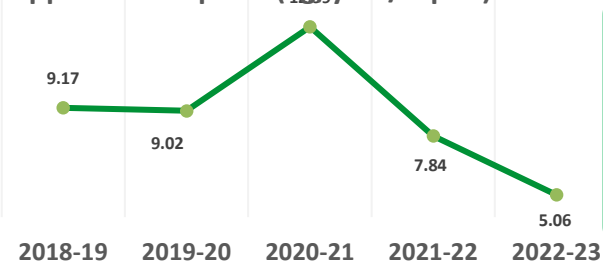




Belgium

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	231.304	241.856	168.032	249.742	238.602	-4,46%	7,12%
Processing (t)	92.400	48.400	25.200	107.500	107.600	0,09%	57,37%
Extra-EU imports (t)	25.821	27.581	23.156	18.644	7.804	-58,14%	-67,21%
Extra-EU exports (t)	12.017	14.967	8.306	21.214	14.346	-32,37%	1,56%
Intra-EU arrivals (t)	95.694	76.062	96.605	77.590	68.487	-11,73%	-20,81%
Intra-EU dispatches (t)	143.930	178.788	104.612	126.641	134.135	5,92%	-3,15%
Fresh net supply (t)	104.473	103.344	149.675	90.621	58.811	-35,10%	-47,50%
Population	11.398.589	11.455.519	11.522.440	11.554.767	11.617.623	0,54%	1,17%
Consumption (kg/year/capita)	9,17	9,02	12,99	7,84	5,06	-35,45%	-48,11%

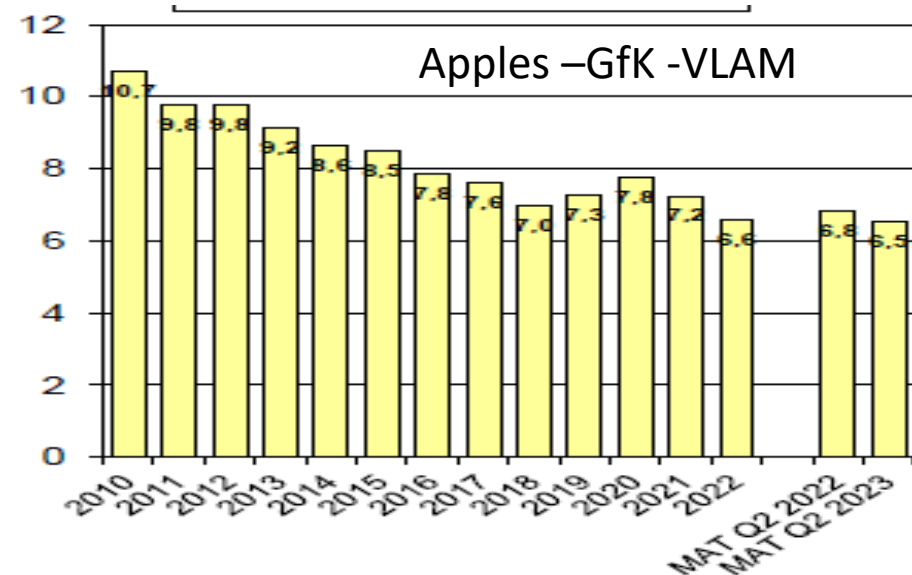
Apple consumption (kg/year/capita)



Market and consumption 5Y trends

Market: 101.385 T
Consumption : 8,8 kg/capita
Trends : -48%

- While declining, bananas ranked nb 2 after bananas and before citrus
- In last 10 years , apples lost 5% in total fruit assortment from 21% to 16%
- Bananas grow from 15% to 19% while oranges also declined from 18% to 12%





Germany

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	1.093.000	991.000	1.023.300	1.005.000	1.072.000	6,67%	4,27%
Processing (t)	306.000	317.100	306.900	251.300	321.600	27,97%	8,90%
Extra-EU imports (t)	28.158	36.986	29.450	36.239	23.820	-34,27%	-27,17%
Extra-EU exports (t)	9.112	6.016	3.473	2.815	3.367	19,63%	-37,11%
Intra-EU arrivals (t)	555.646	559.404	539.739	513.691	458.833	-10,68%	-15,36%
Intra-EU dispatches (t)	55.390	52.665	60.020	48.232	51.470	6,71%	-4,82%
Fresh net supply (t)	1.306.303	1.211.610	1.222.095	1.252.583	1.178.217	-5,94%	-5,60%
Population	82.792.351	83.019.213	83.166.711	83.155.031	83.237.124	0,10%	0,25%
Consumption (kg/year/capita)	15,78	14,59	14,69	15,06	14,15	-6,03%	-5,84%

Apple consumption (kg/year/capita)



Market and consumption 5Y trends

Market: 1.234.161 T
Consumption : 14,86 kg/capita
Trends : -5,84 %

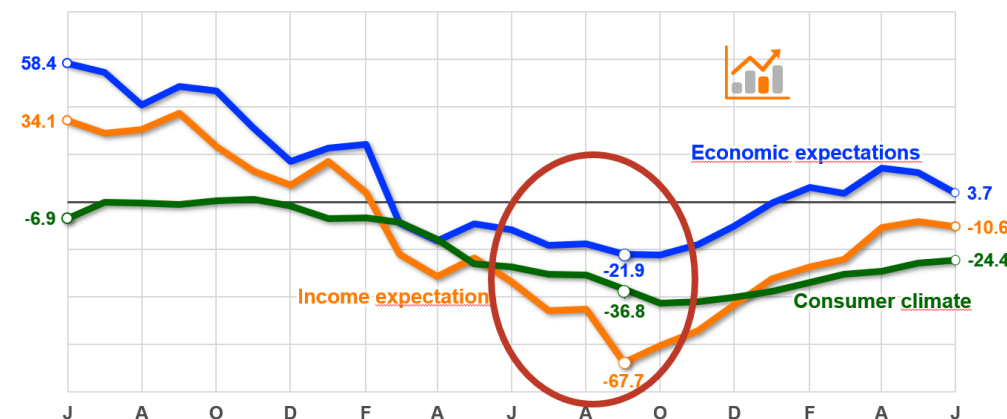
Pressure on volume last season , including on organic

Some signal of recovery for the new season for prices and penetration rates

Adaptation of varieties to demand needed
Some quality issues impacted attractiveness and consumption

Improved consumer climate

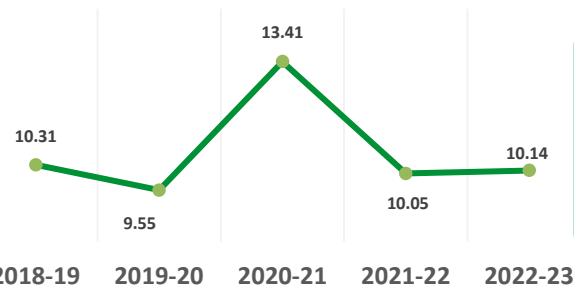
GfK Consumer Climate Study for Germany, June 2021 to June 2023, in indicator points



Denmark

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	24.000	15.000	24.000	18.000	24.000	33,33%	18,52%
Processing (t)	6.000	3.800	6.000	300	300	0,00%	-92,55%
Extra-EU imports (t)	5.745	5.716	6.490	4.375	1.266	-71,06%	-77,31%
Extra-EU exports (t)	2.008	2.212	2.091	2.105	1.983	-5,79%	-5,75%
Intra-EU arrivals (t)	42.367	45.776	61.181	42.664	40.240	-5,68%	-16,16%
Intra-EU dispatches (t)	4.507	5.014	5.488	3.958	3.661	-7,51%	-22,80%
Fresh net supply (t)	59.597	55.466	78.092	58.676	59.562	1,51%	-5,39%
Population	5.781.190	5.806.081	5.822.763	5.840.045	5.873.420	0,57%	1,05%
Consumption (kg/year/capita)	10,31	9,55	13,41	10,05	10,14	0,93%	-6,36%

Apple consumption (kg/year/capita)



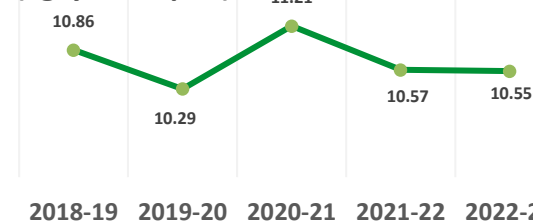
Market and consumption 5Y trends

Market: 62.269 T
Consumption : 10,69 kg/capita
Trends : -6,36 %

Sweden

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	32.000	20.000	32.000	27.000	30.000	11,11%	8,11%
Processing (t)	300	200	300	300	300	0,00%	9,09%
Extra-EU imports (t)	12.122	9.311	8.030	13.809	10.061	-27,14%	-6,99%
Extra-EU exports (t)	32	39	15	31	55	75,29%	85,68%
Intra-EU arrivals (t)	67.779	77.294	77.573	70.778	72.179	1,98%	-1,60%
Intra-EU dispatches (t)	1.621	1.083	1.533	1.582	1.649	4,21%	13,34%
Fresh net supply (t)	109.947	105.284	115.754	109.673	110.237	0,51%	0,07%
Population	10.120.242	10.230.185	10.327.589	10.379.295	10.452.326	0,70%	1,83%
Consumption (kg/year/capita)	10,86	10,29	11,21	10,57	10,55	-0,19%	-1,73%

Apple consumption (kg/year/capita)



Market and consumption 5Y trends

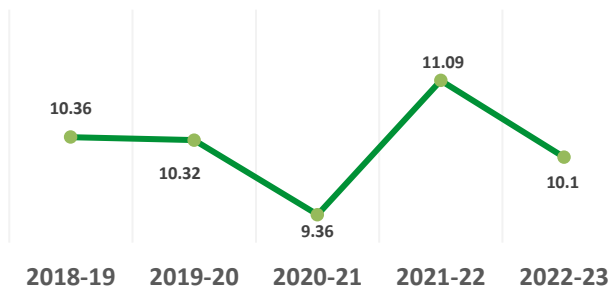
Market: 110.179 T
Consumption : 10,70 kg/capita
Trends : -1,73 %



Spain

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	476.305	555.453	425.453	563.441	411.977	-26,88%	-18,45%
Processing (t)	95.200	111.000	85.000	112.600	82.400	-26,82%	-18,38%
Extra-EU imports (t)	12.636	11.592	9.538	11.209	5.776	-48,47%	-48,63%
Extra-EU exports (t)	52.994	85.322	51.112	70.577	49.847	-29,37%	-23,31%
Intra-EU arrivals (t)	205.046	180.298	203.215	197.416	234.014	18,54%	19,09%
Intra-EU dispatches (t)	62.500	66.478	59.058	63.017	40.493	-35,74%	-35,48%
Fresh net supply (t)	483.293	484.543	443.036	525.872	479.026	-8,91%	-1,07%
Population	46.658.447	46.937.060	47.332.614	47.398.695	47.432.893	0,07%	0,75%
Consumption (kg/year/capita)	10,36	10,32	9,36	11,09	10,10	-8,97%	-1,80%

Apple consumption (kg/year/capita)



Market and consumption 5Y trends

Market: 483.154 T

Consumption : 10,25 kg/capita

Trends : -1,80 %

HOW DO APPLES TAKE CARE OF US?

ASTRINGENT OR LAXATIVE

Its properties promote the correct functioning of intestinal transit.

ANTIOXIDANT

In your skin there are components that act beneficially on free radicals (those responsible for oxidation in our body).

FIBER SOURCE

Provides vitamins that fill you with energy and antioxidants.

NATURAL TOOTHPASTE

After each meal, although that doesn't mean we have to stop brushing our teeth.

GUÍDATE COMO TE GUIDAN LAS MANZANAS

**NO BUSQUES
A TU MEDIA NARANJA
PUDIENDO TENER
A UNA MANZANA
ENTERA**

**RETO
ENCUENTRA
LAS 7 DIFERENCIAS**



Financiado por la Unión Europea

LA UNIÓN EUROPEA RESPALDA LAS CAMPAÑAS QUE PROMUEVEN LA CALIDAD DE LOS PRODUCTOS AGRÍCOLAS



Financiado por la Unión Europea

LA UNIÓN EUROPEA RESPALDA LAS CAMPAÑAS QUE PROMUEVEN LA CALIDAD DE LOS PRODUCTOS AGRÍCOLAS

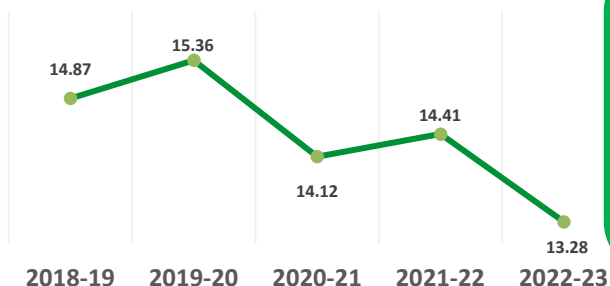




France

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	1.477.000	1.651.000	1.337.000	1.383.000	1.391.000	0,58%	-4,86%
Processing (t)	295.400	330.200	227.300	262.800	319.900	21,73%	14,69%
Extra-EU imports (t)	19.843	14.885	15.355	17.311	10.589	-38,83%	-37,15%
Extra-EU exports (t)	170.192	190.141	149.979	157.919	127.344	-19,36%	-23,77%
Intra-EU arrivals (t)	169.471	112.359	180.079	171.176	120.708	-29,48%	-23,73%
Intra-EU dispatches (t)	203.983	224.102	202.055	175.523	173.934	-0,90%	-13,64%
Fresh net supply (t)	996.738	1.033.801	953.100	975.246	901.119	-7,60%	-8,95%
Population	67.026.224	67.290.471	67.485.531	67.656.682	67.871.925	0,32%	0,75%
Consumption (kg/year/capita)	14,87	15,36	14,12	14,41	13,28	-7,89%	-9,64%

Apple consumption (kg/year/capita)



Market and consumption 5Y trends

Market: 972.001 T

Consumption : 14,41 kg/capita

Trends : -9,64 %

- Penetration rate remain high at 82% but has declined in the last 10 years (erosion of 0,5 point per year)
- Not specific to apples but to many fruits
- Different promotion campaign towards consumers including this year on TV
- Focus on the confidence of agri practices based on Ecoresponsible orchards concept and on the origin

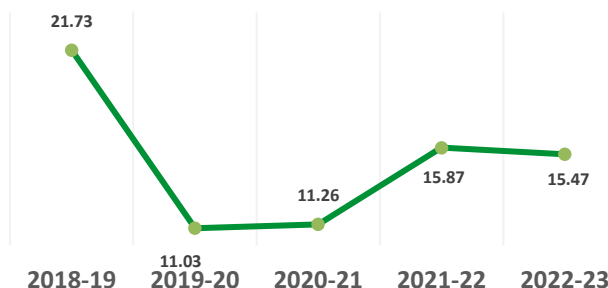




Hungary

		2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
-	Production (t)	782.000	452.000	350.000	520.000	280.000	-46,15%	-46,77%
-	Processing (t)	547.400	339.000	245.000	364.000	190.400	-47,69%	-49,07%
=	Extra-EU imports (t)	1	2.904	71	86	0	-100,00%	-100,00%
+	Extra-EU exports (t)	1.023	1.035	1.385	2.016	3.795	88,29%	178,10%
+	Intra-EU arrivals (t)	9.814	15.842	16.129	16.142	85.441	429,31%	490,00%
-	Intra-EU dispatches (t)	30.892	22.932	9.790	15.784	21.382	35,46%	7,72%
÷	Fresh net supply (t)	212.500	107.779	110.025	154.428	149.864	-2,96%	2,52%
	Population	9.778.371	9.772.756	9.769.526	9.730.772	9.689.010	-0,43%	-0,76%
=	Consumption (kg/year/capita)	21,73	11,03	11,26	15,87	15,47	-2,54%	3,30%

Apple consumption (kg/year/capita)



Market and consumption 5Y trends

Market: 146.919 T

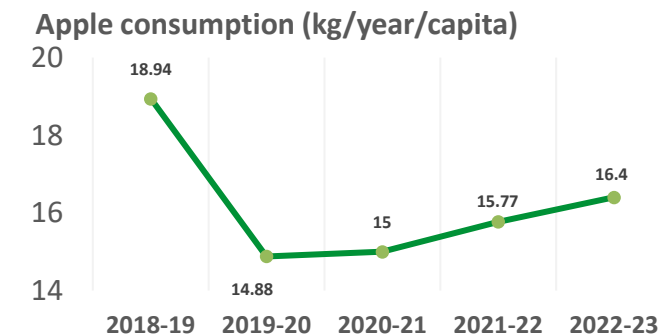
Consumption : 15,07 kg/capita

Trends : 3,30 %



Italy

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	2.264.081	2.095.587	2.123.643	2.052.779	2.112.975	2,93%	-0,99%
Processing (t)	317.000	377.300	254.900	256.600	315.700	23,03%	4,73%
Extra-EU imports (t)	5.153	5.818	6.907	8.428	3.984	-52,72%	-39,41%
Extra-EU exports (t)	395.379	345.295	379.075	404.584	372.508	-7,93%	-2,25%
Intra-EU arrivals (t)	58.886	39.714	14.849	29.526	23.927	-18,96%	-33,06%
Intra-EU dispatches (t)	470.333	528.287	616.823	495.465	484.569	-2,20%	-8,18%
Fresh net supply (t)	1.145.408	890.238	894.601	934.082	968.109	3,64%	0,21%
Population	60.483.973	59.816.673	59.641.488	59.236.213	59.030.133	-0,35%	-1,28%
Consumption (kg/year/capita)	18,94	14,88	15,00	15,77	16,40	4,00%	1,57%



Market and consumption 5Y trends

Market: 966.488 T

Consumption : 16,20 kg/capita

Trends : 1,57 %

- Know-Apples campaign towards sales professional under Enjoy its from Europe
- 30 trainings covering 450 staff members in IT and ES
- Information on apples assets passed to 4.270 employees at selling points





Netherlands

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	267.000	272.000	220.000	243.000	234.500	-3,50%	-6,39%
Processing (t)	26.700	40.800	28.600	30.400	29.400	-3,29%	-7,04%
Extra-EU imports (t)	113.222	112.159	109.600	134.661	71.205	-47,12%	-39,35%
Extra-EU exports (t)	20.211	24.623	19.747	16.058	18.466	14,99%	-8,40%
Intra-EU arrivals (t)	151.430	140.535	174.756	151.396	111.527	-26,33%	-27,83%
Intra-EU dispatches (t)	172.226	217.921	188.457	169.747	143.862	-15,25%	-23,10%
Fresh net supply (t)	312.514	241.349	267.551	312.852	225.504	-27,92%	-20,48%
Population	17.181.084	17.282.163	17.407.585	17.475.415	17.590.672	0,66%	1,47%
Consumption (kg/year/capita)	18,19	13,97	15,37	17,90	12,82	-28,39%	-21,63%

Apple consumption (kg/year/capita)



Market and consumption 5Y trends

Market: 271.954 T

Consumption : 15,65 kg/capita

Trends : -21,63 %

SPRANK appels geplukt tijdens Albert Heijn Plukdag

Afgelopen zaterdag namen klanten - op de jaarlijkse Albert Heijn Plukdag - een kijkje in de boomgaard bij één van de Beter voor Natuur & Boer-telers om heerlijke SPRANK appels te plukken én te proeven. Honderden enthousiaste appelliefhebbers waren aanwezig.



	Apples
2015	11,9
2016	11,6
2017	11,5
2018	10,5
2019	11,2
2020	11,3
2021	10,8
2022	10,3

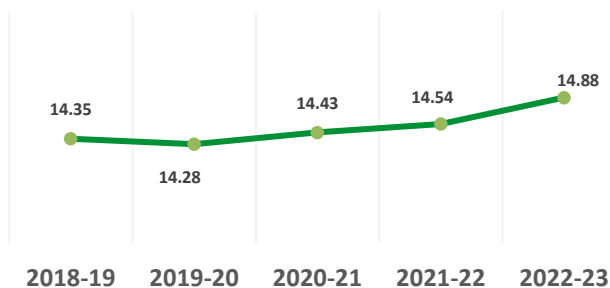




Poland

	2018-19	2019-20	2020-21	2021-22	2022-23	2022-23/ 2021-22	2022-23/ 4-y avg.
Production (t)	4.810.000	2.910.000	3.410.000	4.300.000	4.495.000	4,53%	16,53%
Processing (t)	3.294.850	1.722.720	2.083.510	2.945.500	3.146.500	6,82%	25,28%
Extra-EU imports (t)	584	476	138	129	327	152,30%	-1,53%
Extra-EU exports (t)	555.144	350.199	360.091	373.861	326.224	-12,74%	-20,40%
Intra-EU arrivals (t)	5.812	12.212	5.719	1.748	2.005	14,67%	-68,55%
Intra-EU dispatches (t)	421.290	307.391	424.599	432.175	464.125	7,39%	17,10%
Fresh net supply (t)	545.113	542.378	547.656	550.342	560.482	1,84%	2,58%
Population	37.976.687	37.972.812	37.958.138	37.840.001	37.654.247	-0,49%	-0,75%
Consumption (kg/year/capita)	14,35	14,28	14,43	14,54	14,88	2,34%	3,35%

Apple consumption (kg/year/capita)



Market and consumption 5Y trends

Market: 549.194 T
Consumption : 14,50 kg/capita
Trends : 3,35 %

Highest penetration rate for Europe

Apples sold on the market are 99% local - little attractiveness of organic

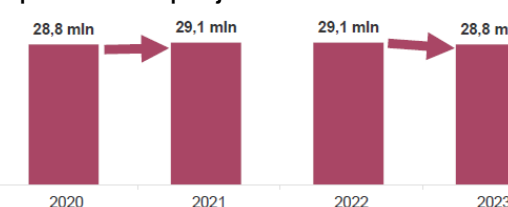
Frequency of apples consumption in Poland

- 9% of Poles ate apples every day
- 15% - 4-5 times a week
- 42% - 2-3 times a week
- 22% - once a week

Segment weights:

- 42% of those who consume 2-3 times a week is 44% of the volume
- 15% of those who consume 4-5 times a week give 26% of sales
- 9% of Poles who consume every day is 22% of sales
- 22% of consumers once a week account for 8% of sales

Upcoming promotion campaign in Poland under 'The good move' promotion project



89%

61%

56%



Europe Union

- **Apples is one of the most regarding segment** in the fruit category across the EU but under heavy internal competition from other snacking options
- **Keep attention on essential factors** for not losing more
 - Presentation on the shelf => attractiveness
 - Consumers satisfaction => adapting taste
 - Buying experience / Image
 - Adapt to new consumption place and moment => snacking
 - Reach out to evolving consumers => influencers, social media
- **Get the right policy support**
 - Production tools
 - Reserch and innovation
 - Food policy
 - Promotion and image tools
 - Communication on health and other envi benefits



APPLES are a nutritious fruit:



High in fibre



Saturated fat free



Naturally fat free



Low fat food



Naturally occurring sugars



Naturally sodium free



Contain fructose



Naturally salt free

