



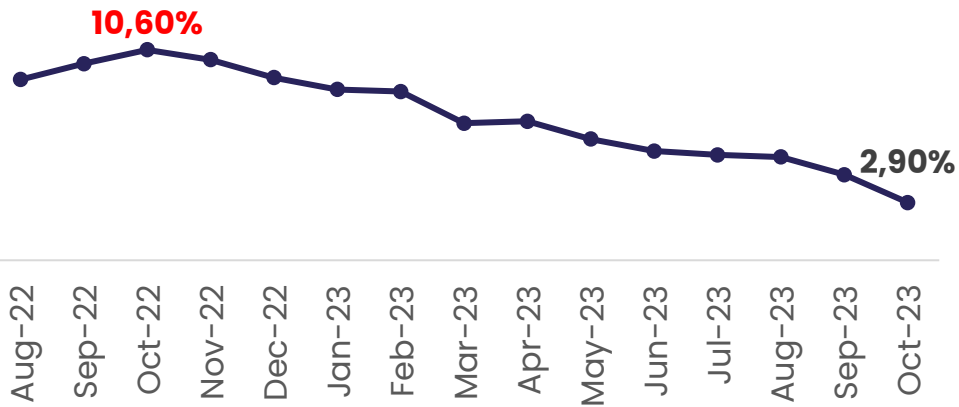
DG AGRI Citrus Market Observatory

A retail perspective

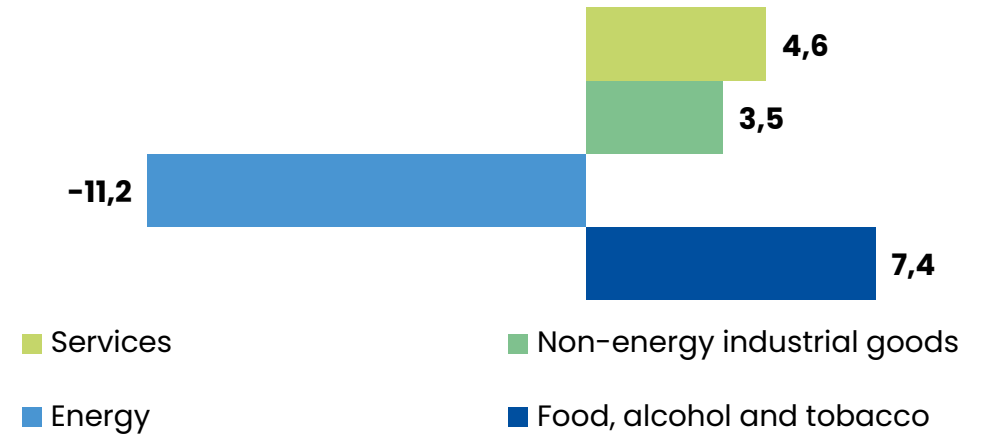
24 November 2023



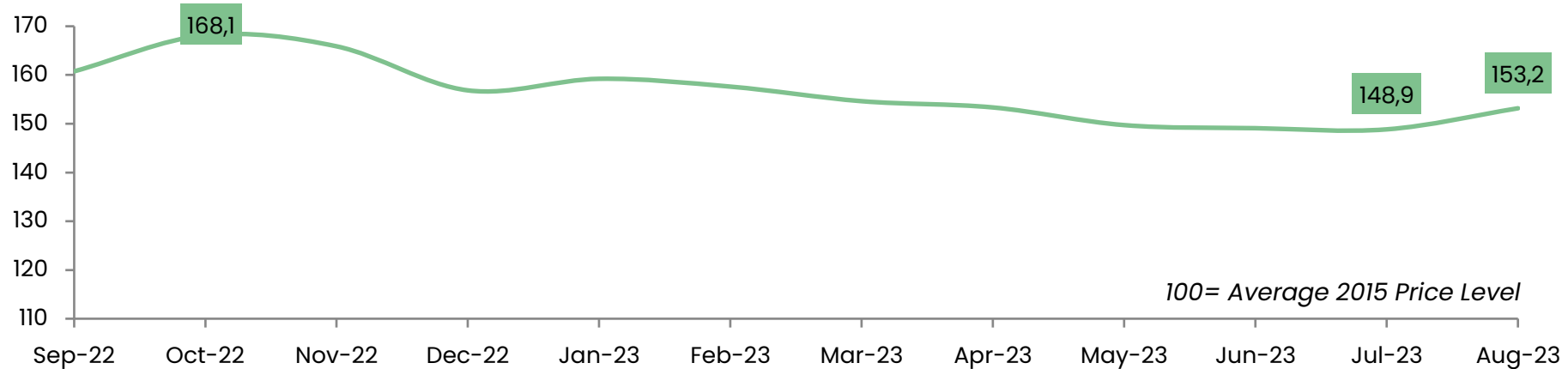
The macroeconomic situation



After peaking last October, inflation is slowly decreasing

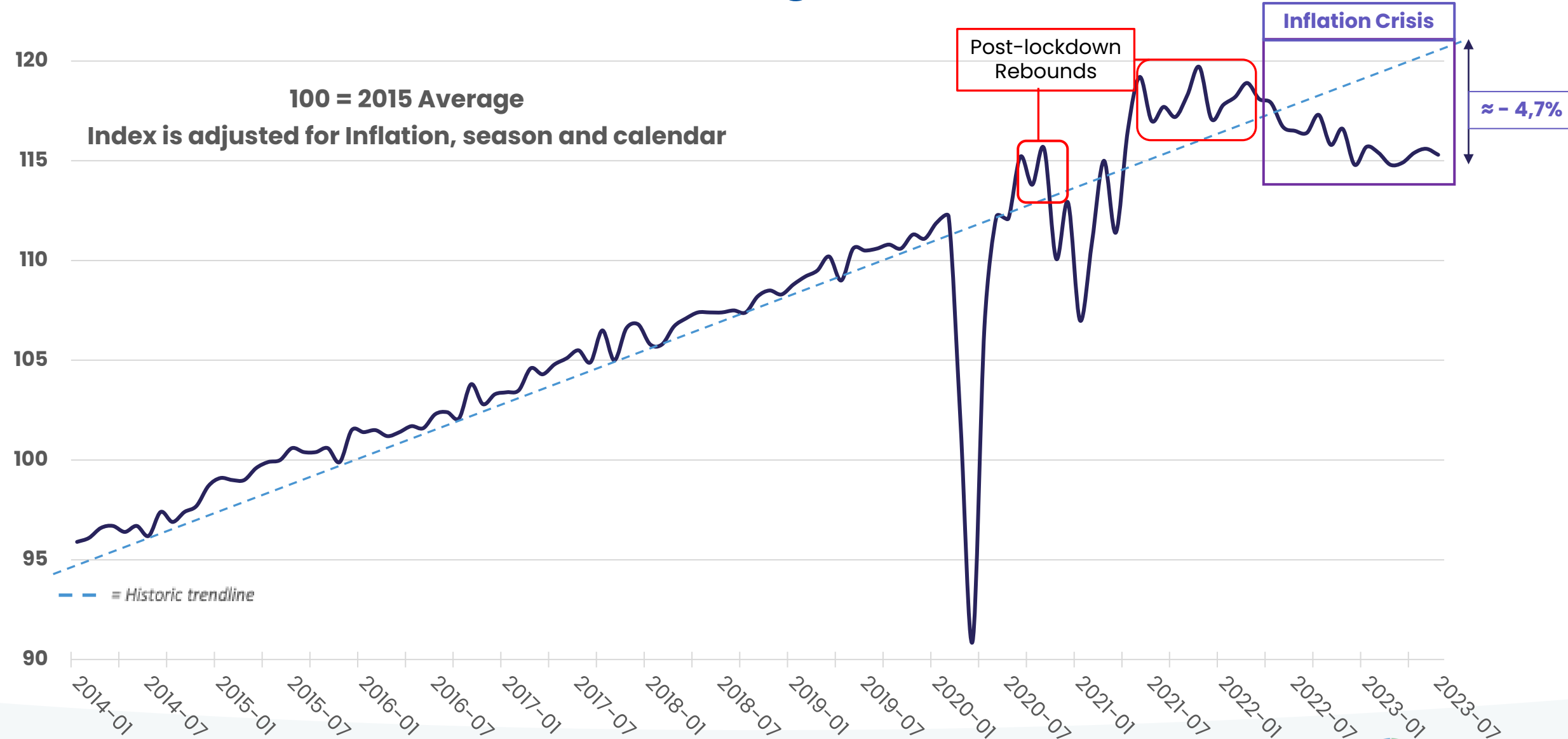


Food inflation remains higher

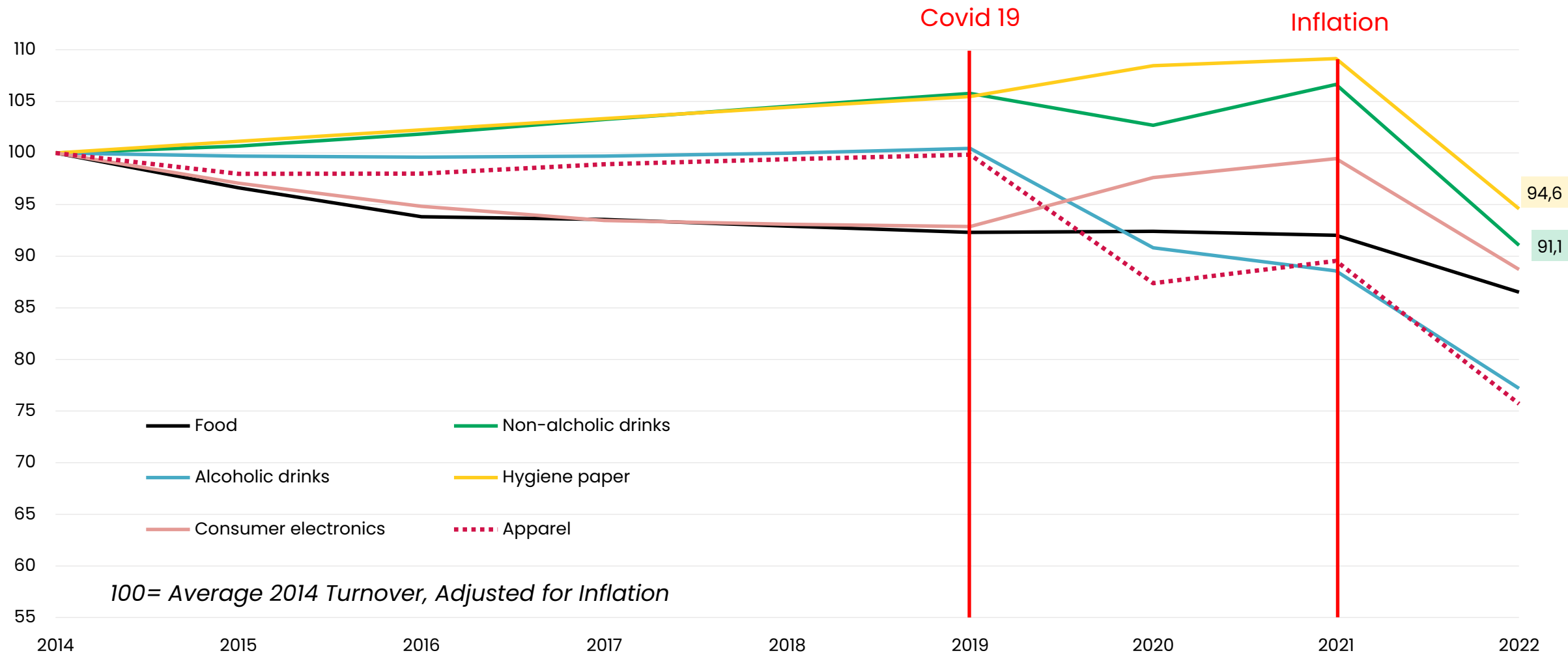


Decline of energy prices has stopped

Retail volumes have been declining



Retail volumes crashing across product categories



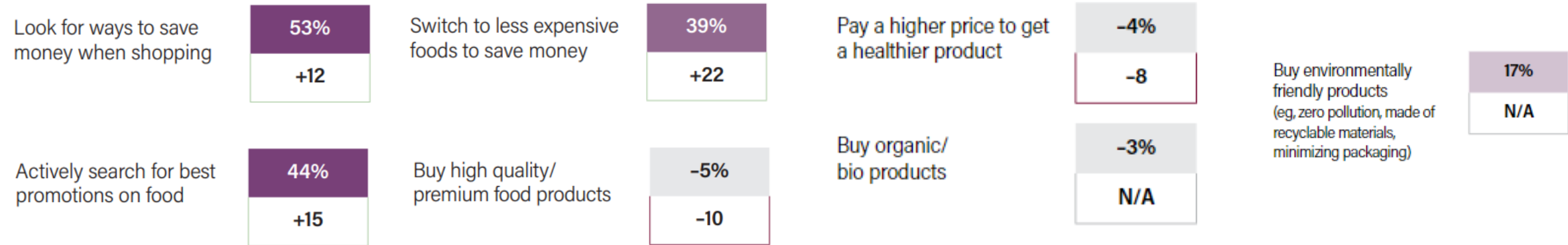
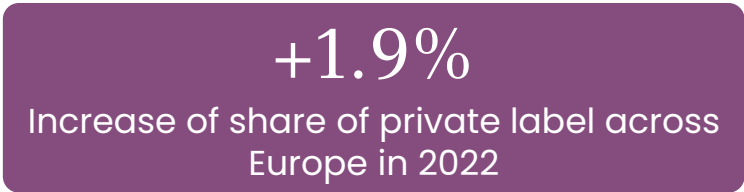
Consumers in a cost-of-living crisis

Consumers have downtraded when shopping

Consumers are reducing purchases of fresh products (meat, fish, fruit and vegetables) and organic food.

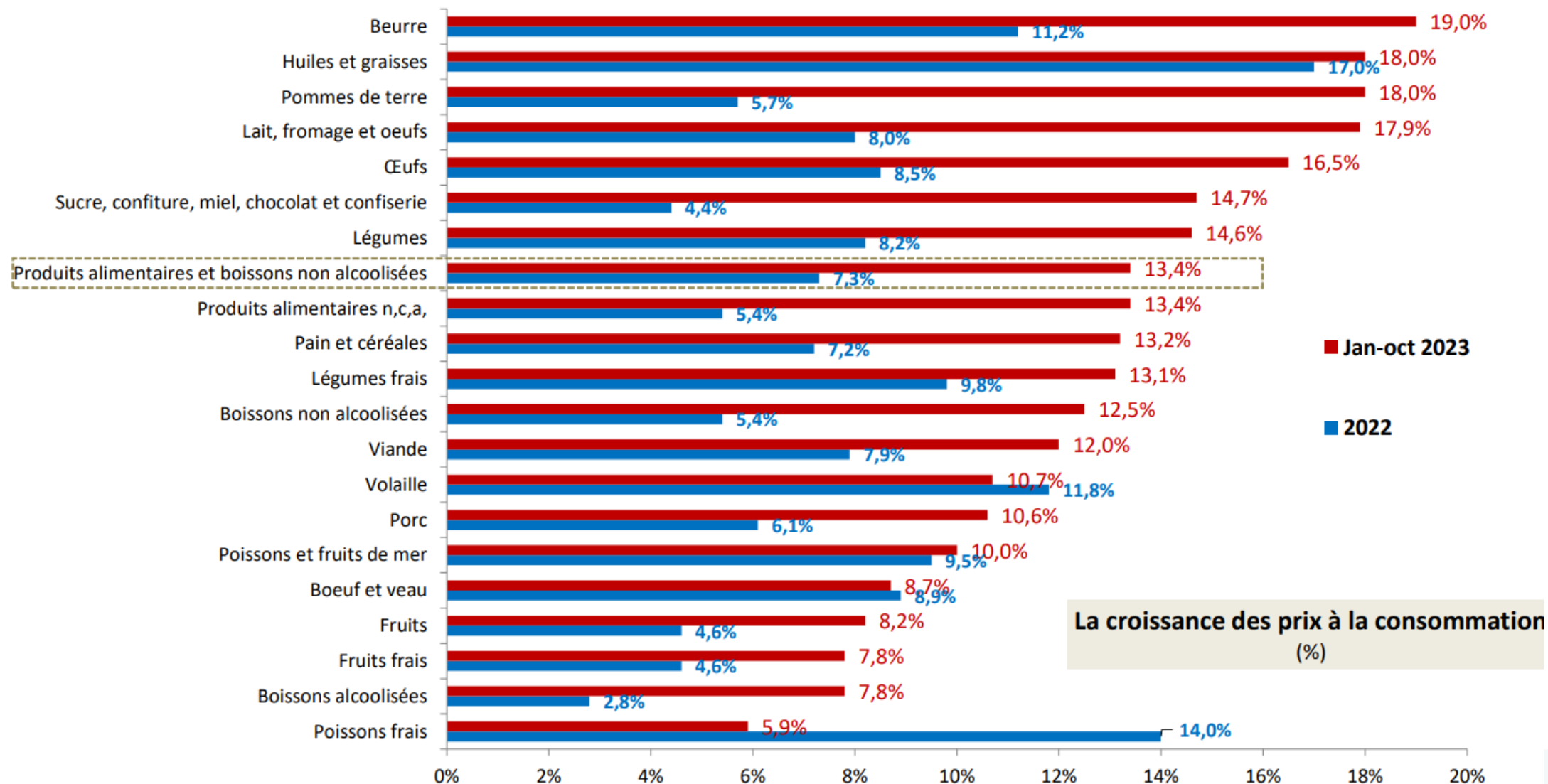
Consumers prefer shopping at discounters and purchase more private label products than A-brands.

Amidst a cost-of-living crisis, consumers:

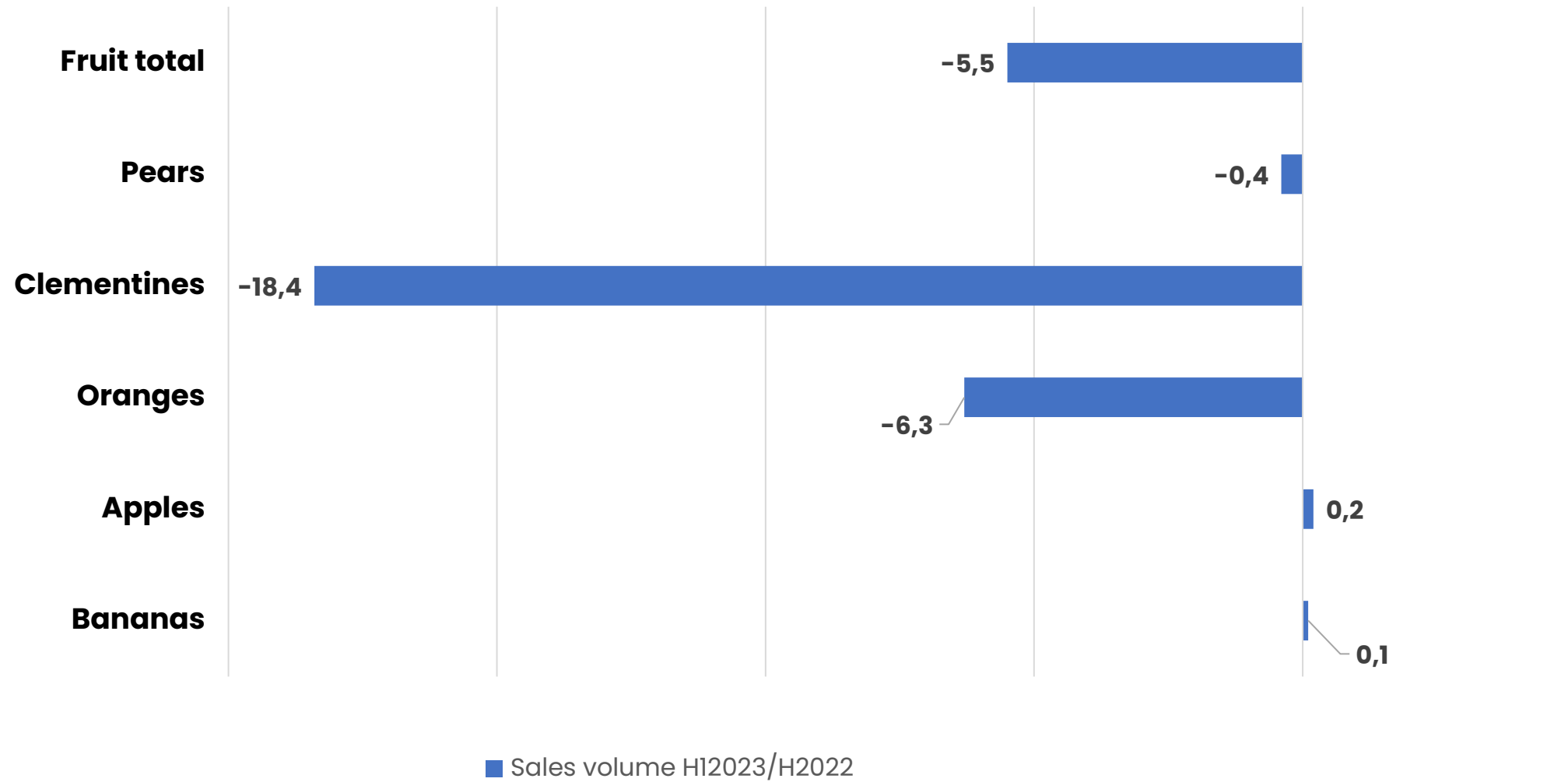


France

Focus on food inflation



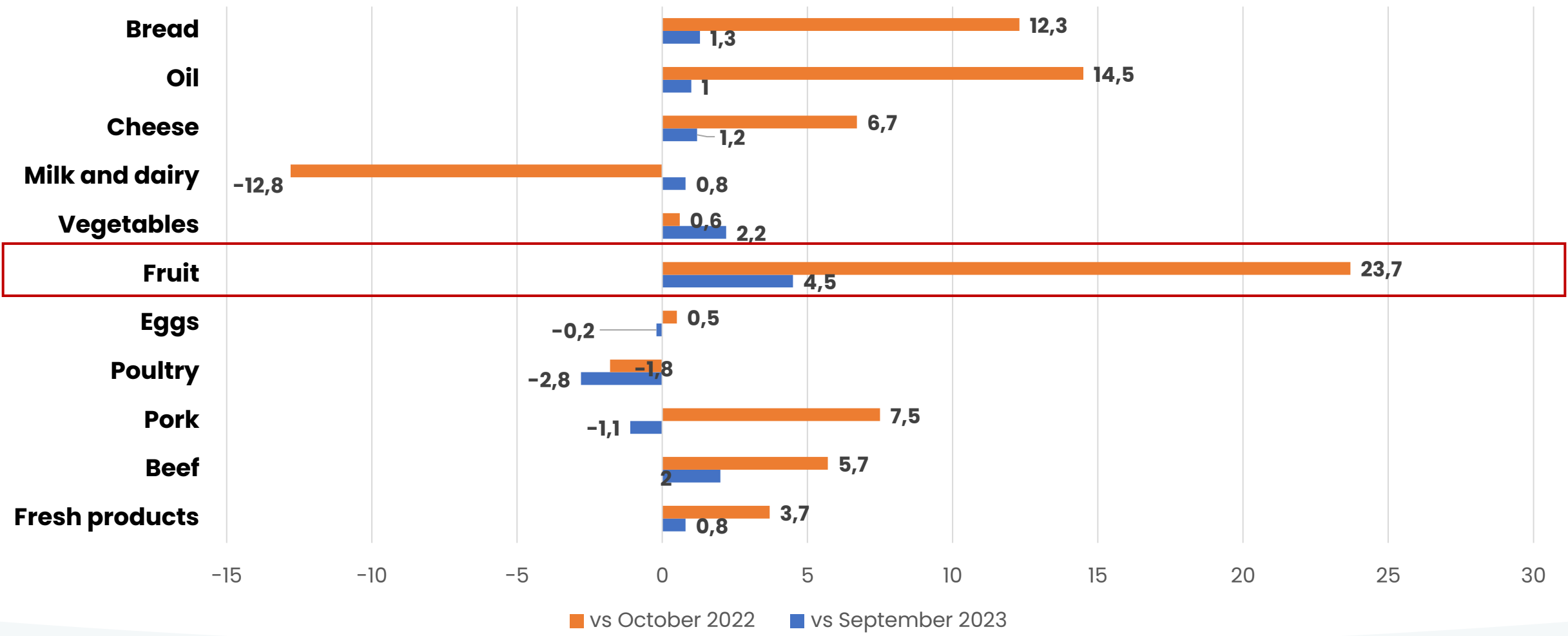
Sales of fruit



Germany

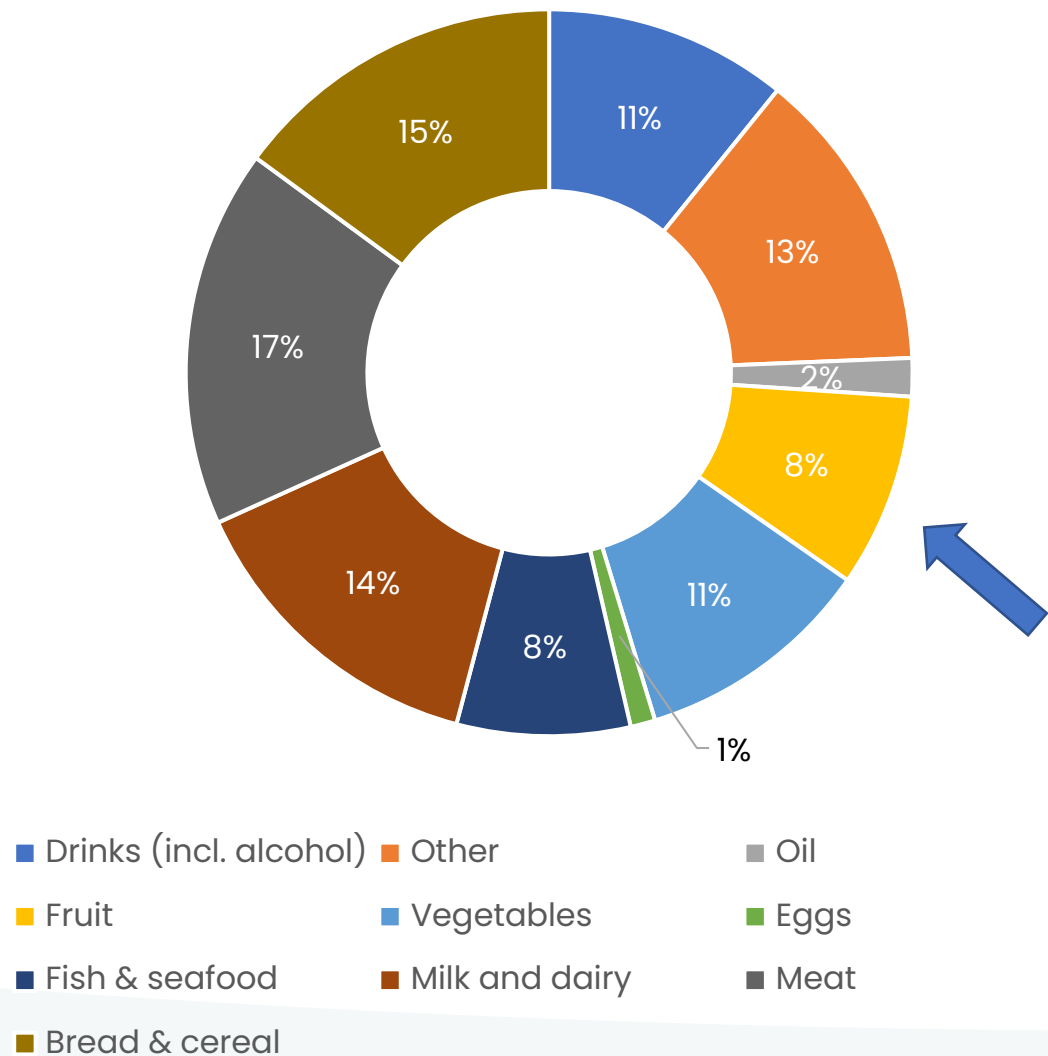
Focus on food inflation

Retail price changes (%) – October 2023

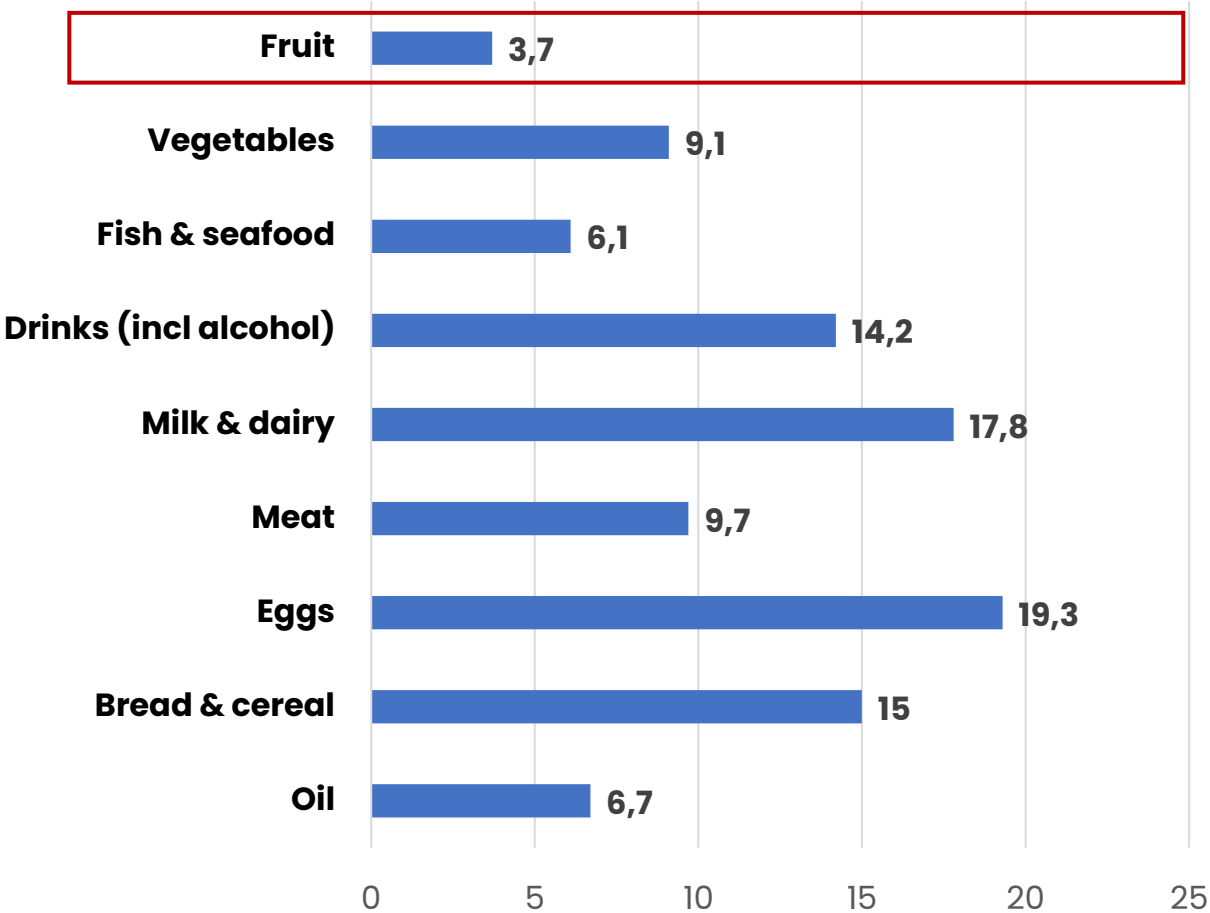


Italy

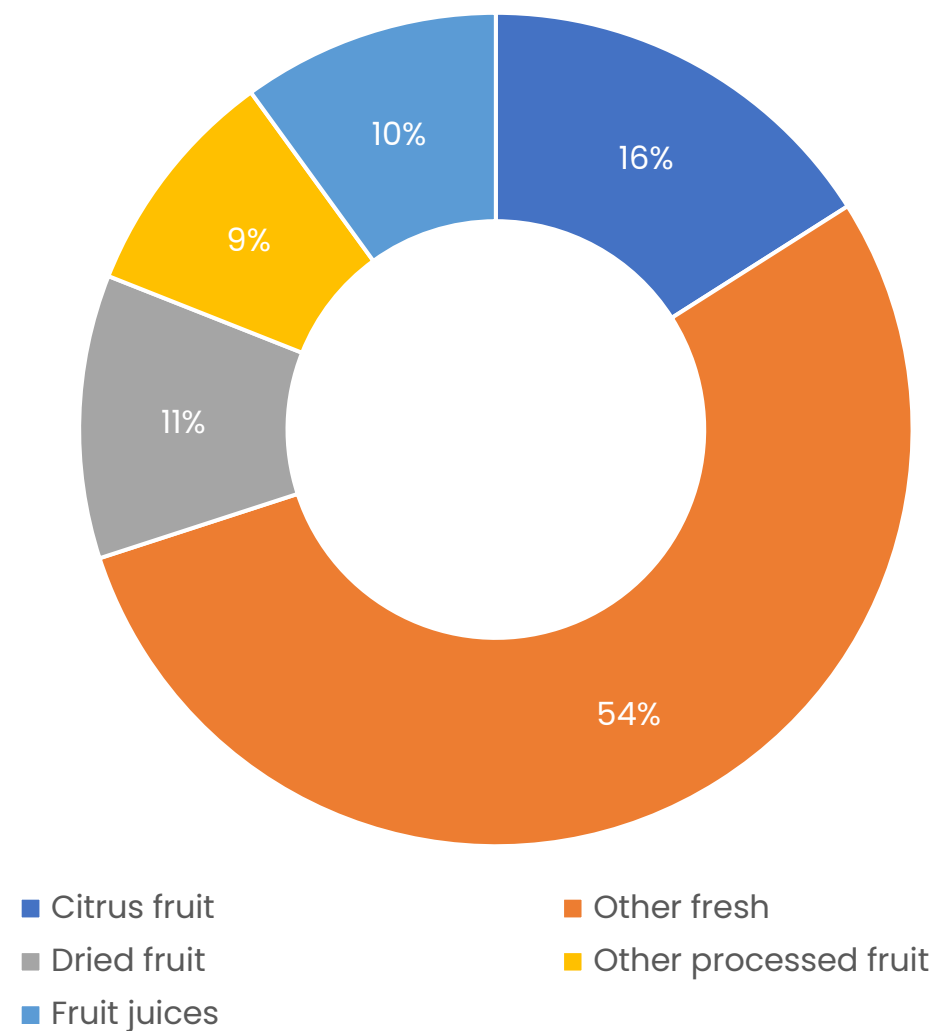
The shopping basket in 2023



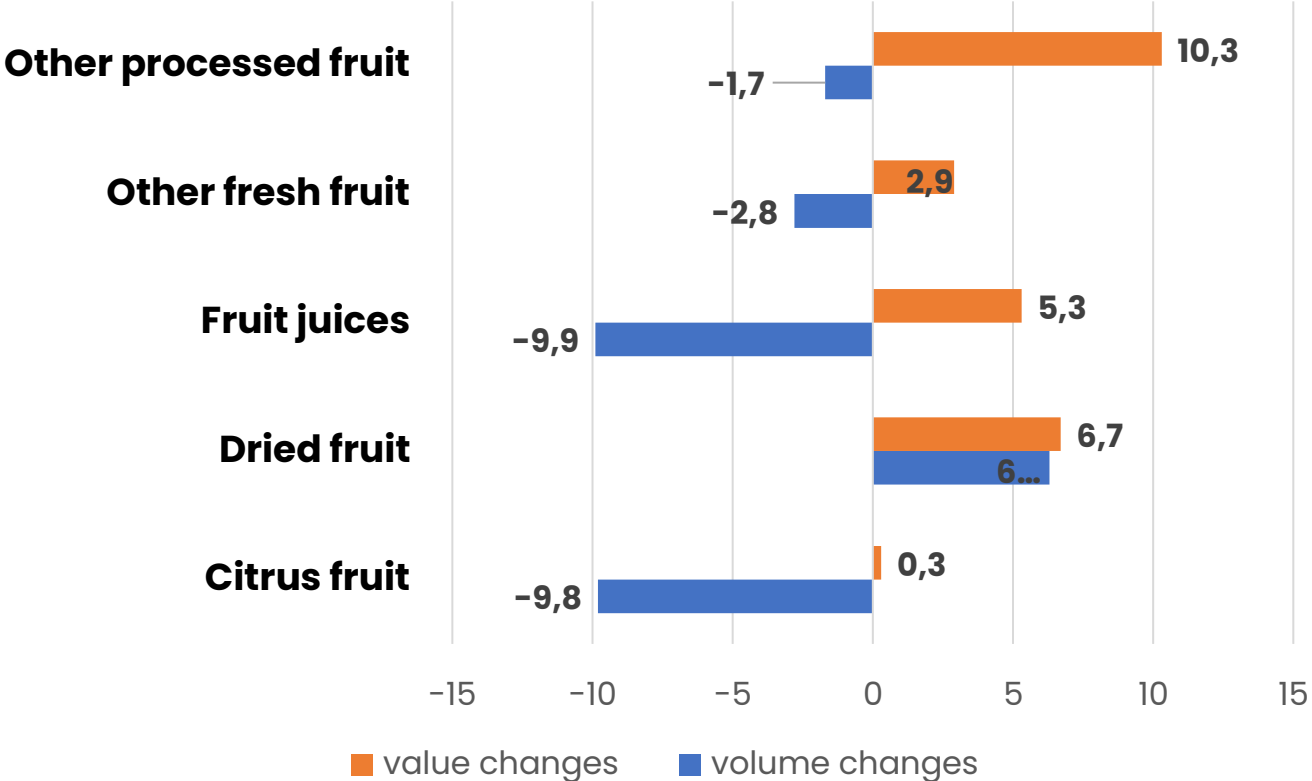
Sales value changes (%) – H1 2023 vs H1 2022



The fruit shopping basket in 2023

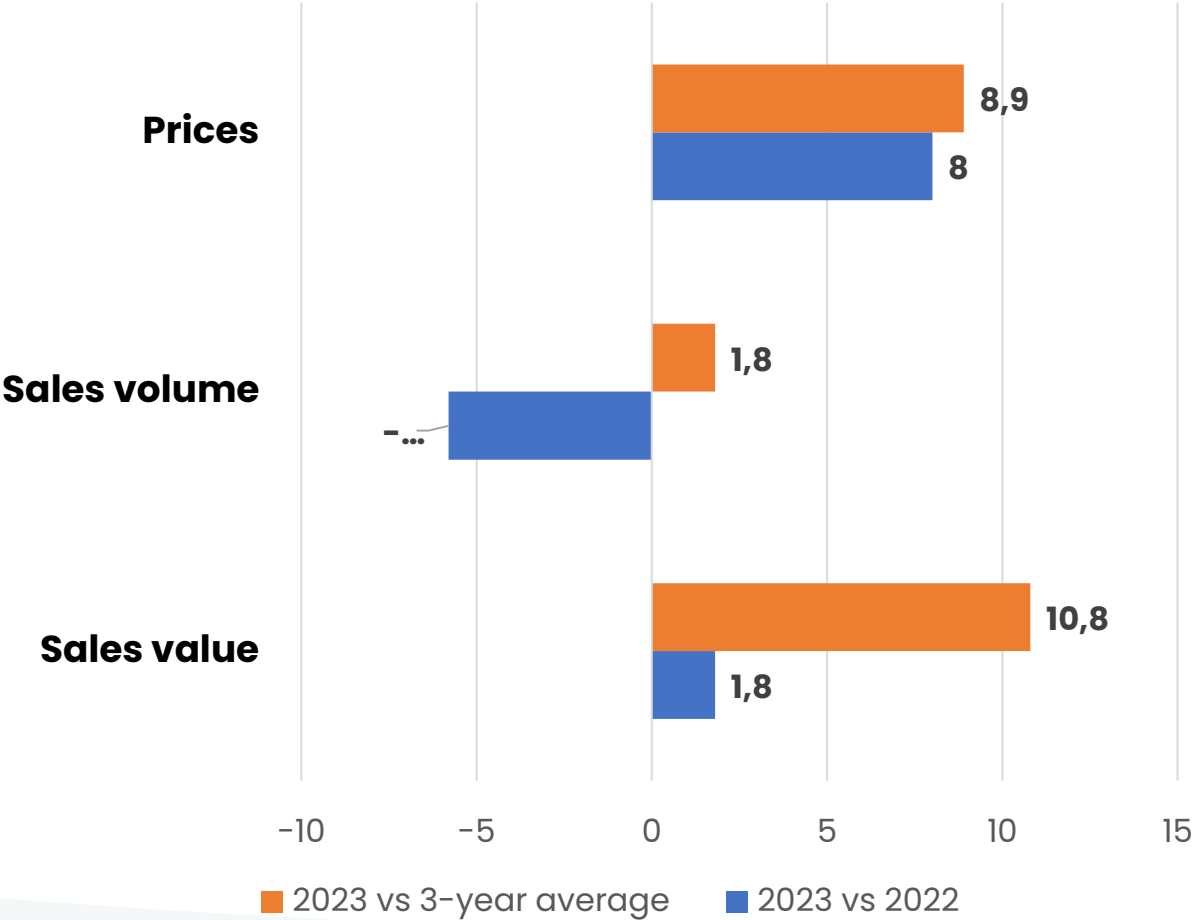


Changes in value and volumes (%) – H1 2023 vs H1 2022

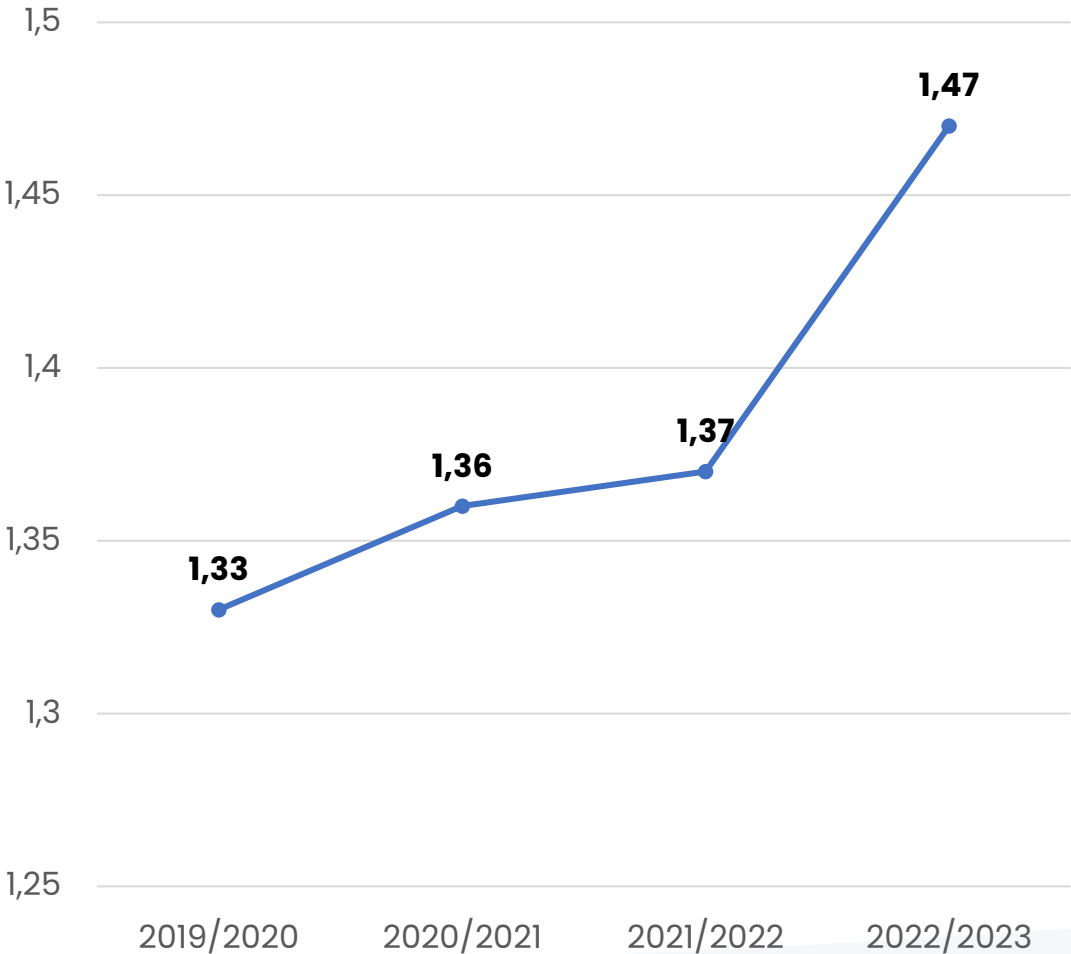


Focus on oranges

Changes (%) – 2023 vs 2022 and 3-year average



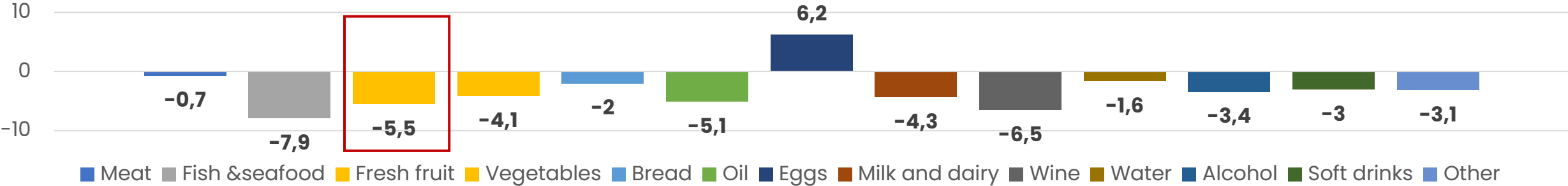
Average prices (€/Kg)



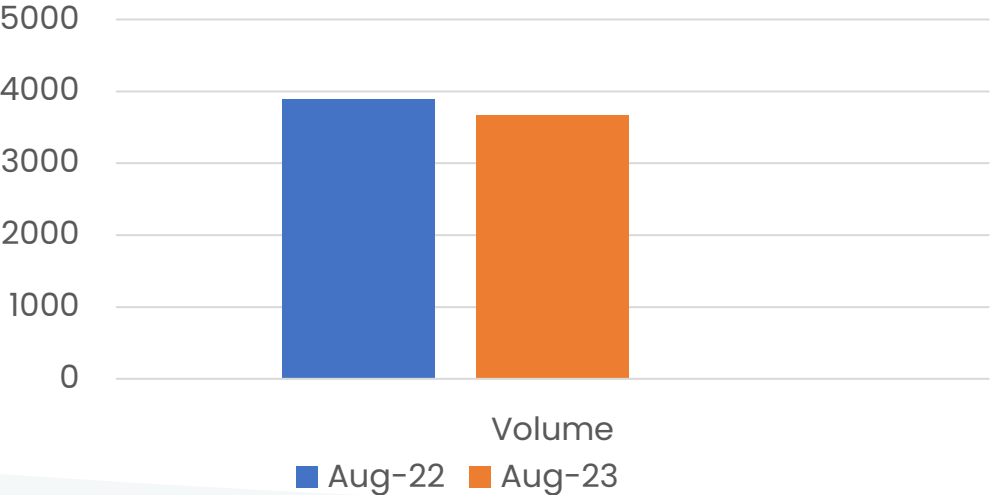
Spain

Fruit sales in 2023 (I)

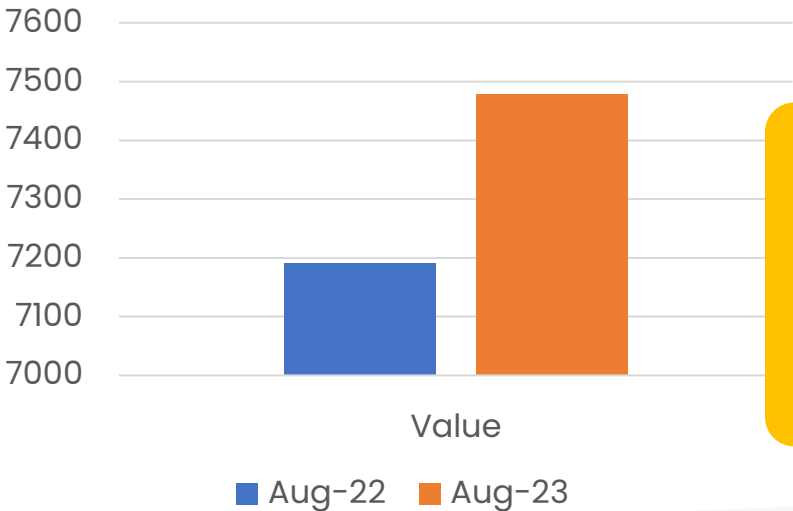
Food home consumption – volume changes (%) in August 2023 vs August 2022



Volume (million kg)



Value (EUR million)



Sales of fresh fruit decreased by 5,5% in volume in 2023 compared to 2022 and increased by 4% in value.

Fruit sales in 2023 (II)

Volume and value changes (%) as of August 2023

