



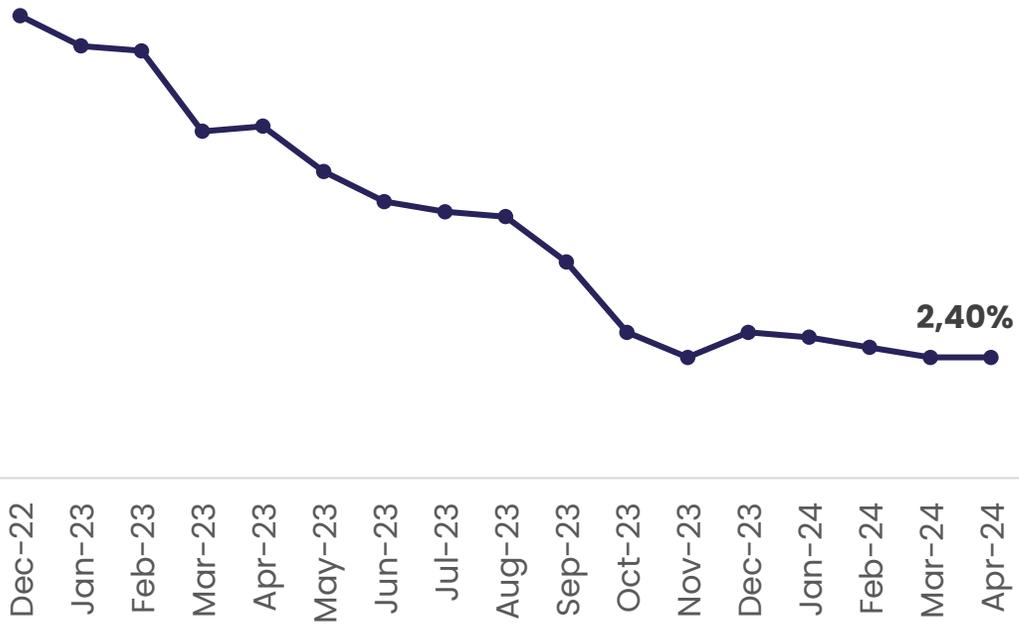
DG AGRI Pip Fruit Market Observatory

A retail perspective

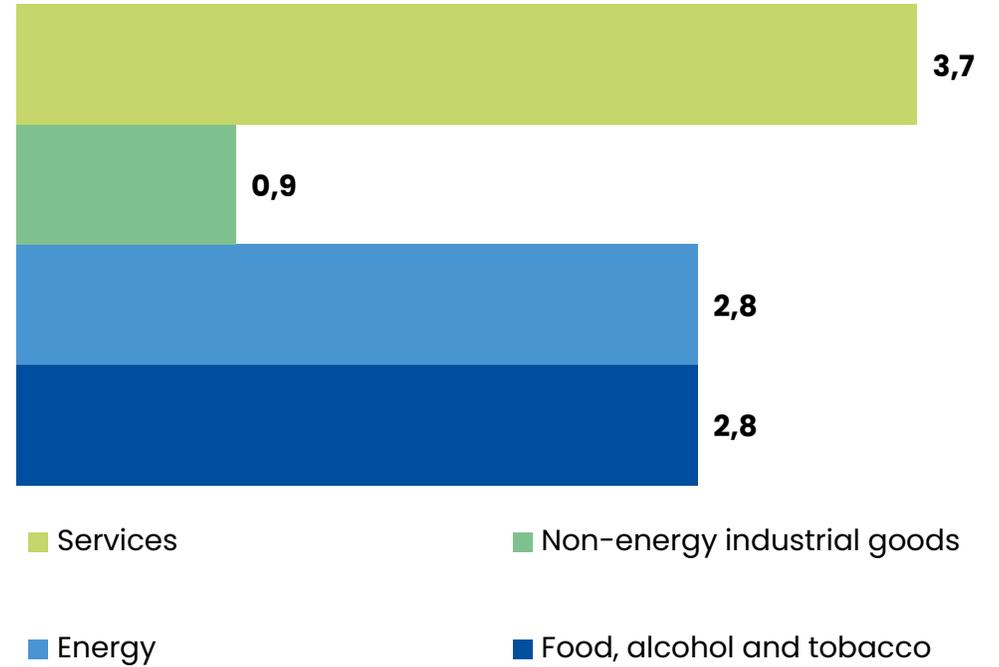
22 May 2023



The macroeconomic situation



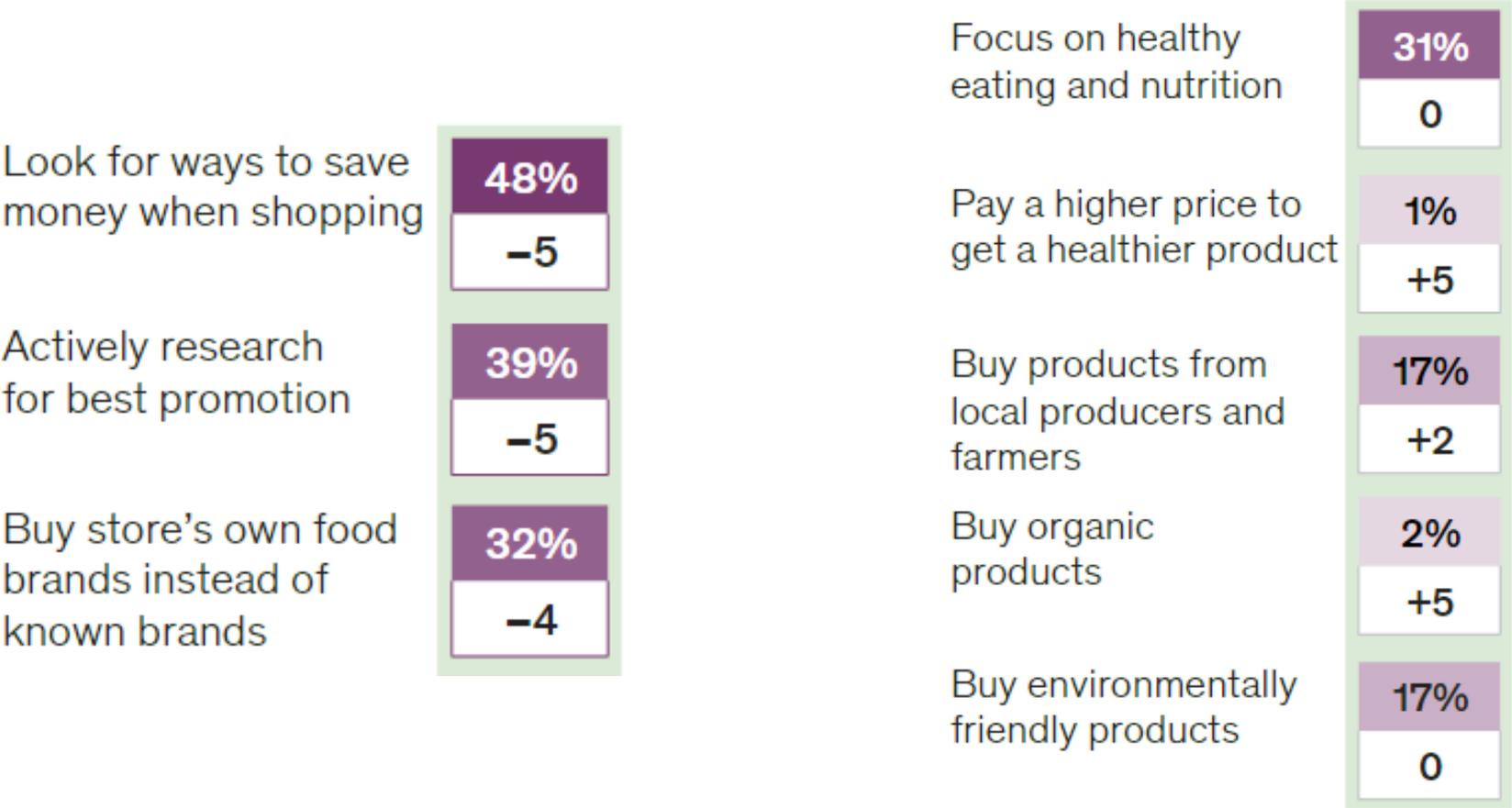
After peaking in 2022, inflation is decreasing



Food inflation remains higher

Consumers in a cost-of-living crisis

Consumers have downtraded when shopping, but things are looking up

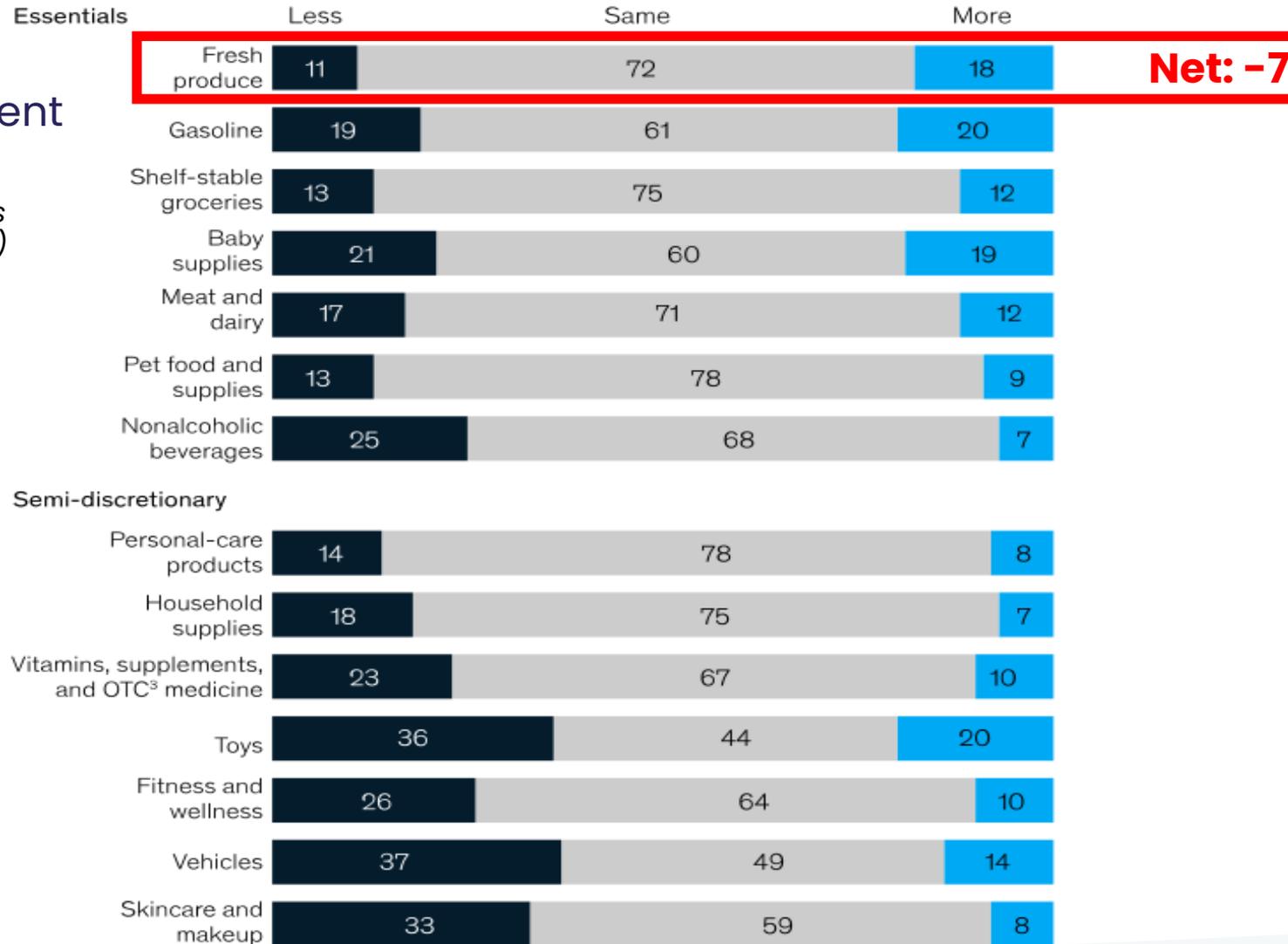


Source: EuroCommerce & McKinsey

Consumers still careful, only trading up for health

Consumer Spending Intent Q1 2024

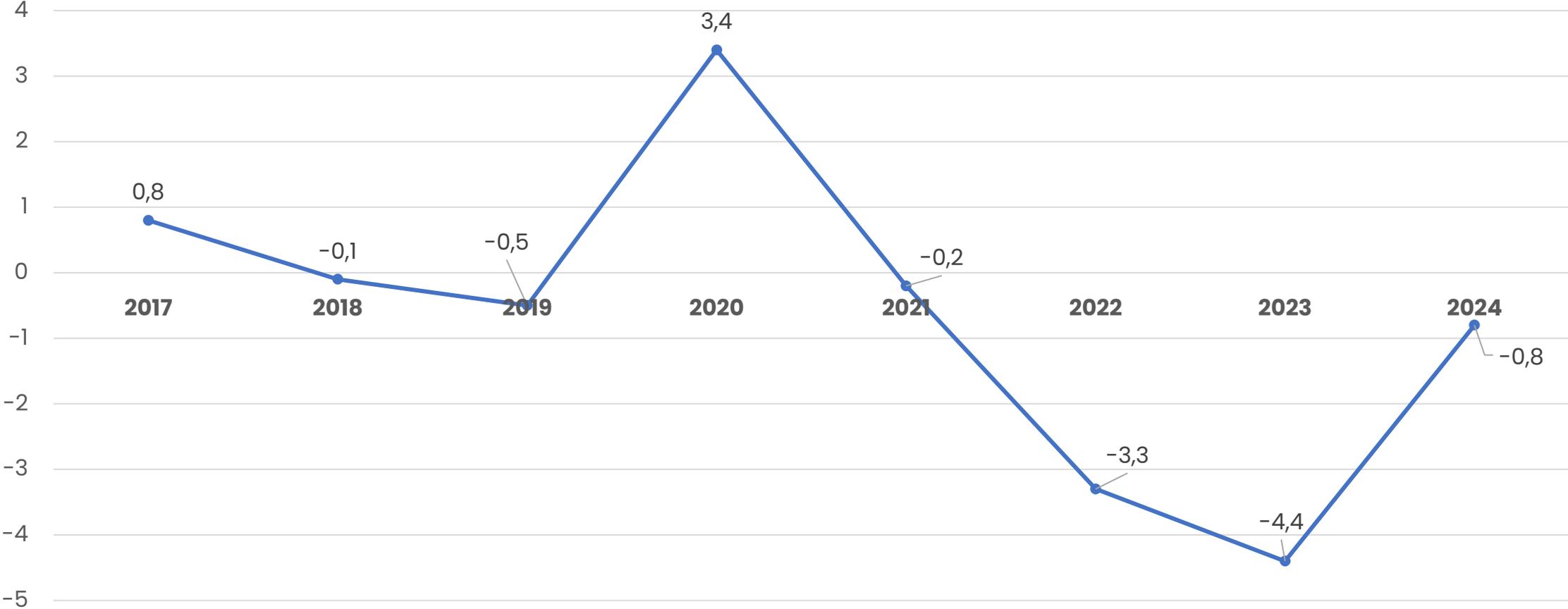
in the 5 biggest European Countries
(France, Germany, Italy, Spain & UK)



France

Retail volumes decline

Home consumption evolution (% in volume)



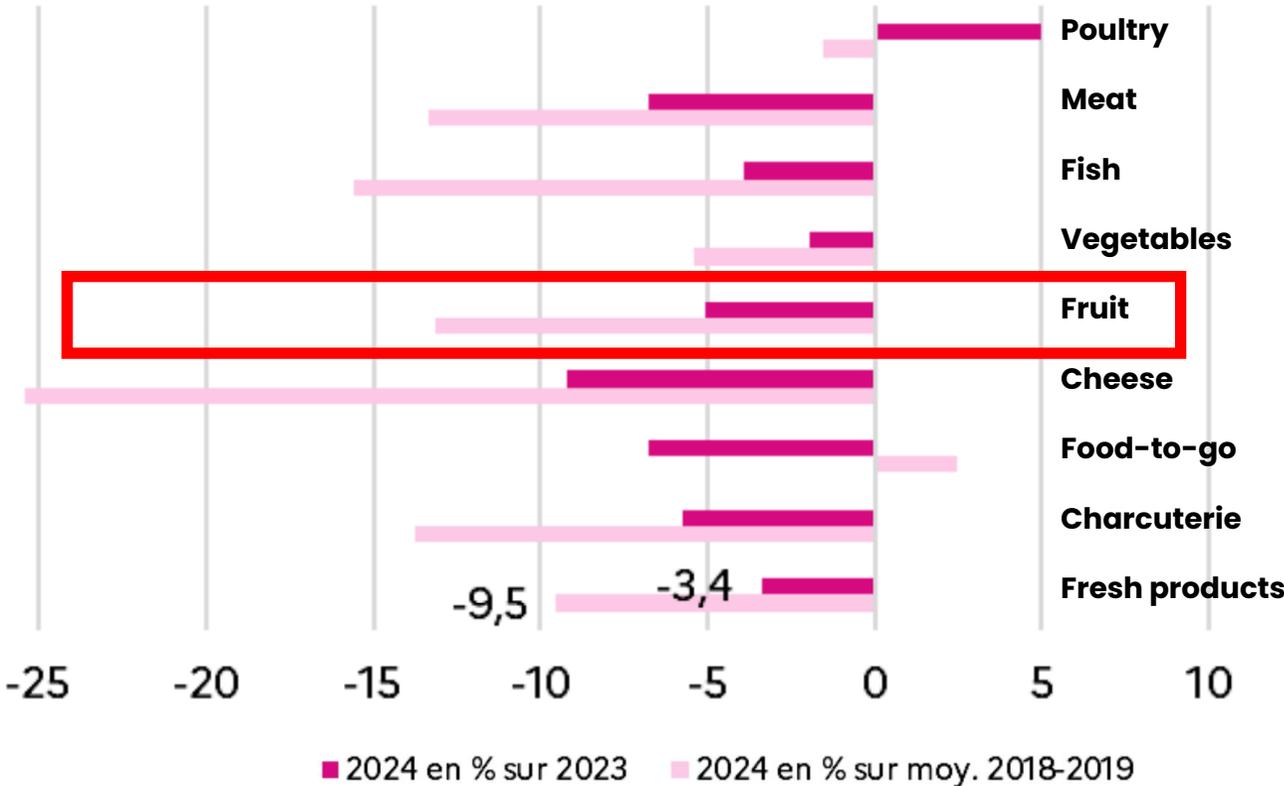
Source: Agrimer

Sales volume - focus on fruit

-4%
 Decrease in sales volume for **fruit** in 2023 vs 2022

-7%
 Decrease in sales volume for **fresh fruit** vs 3-year average

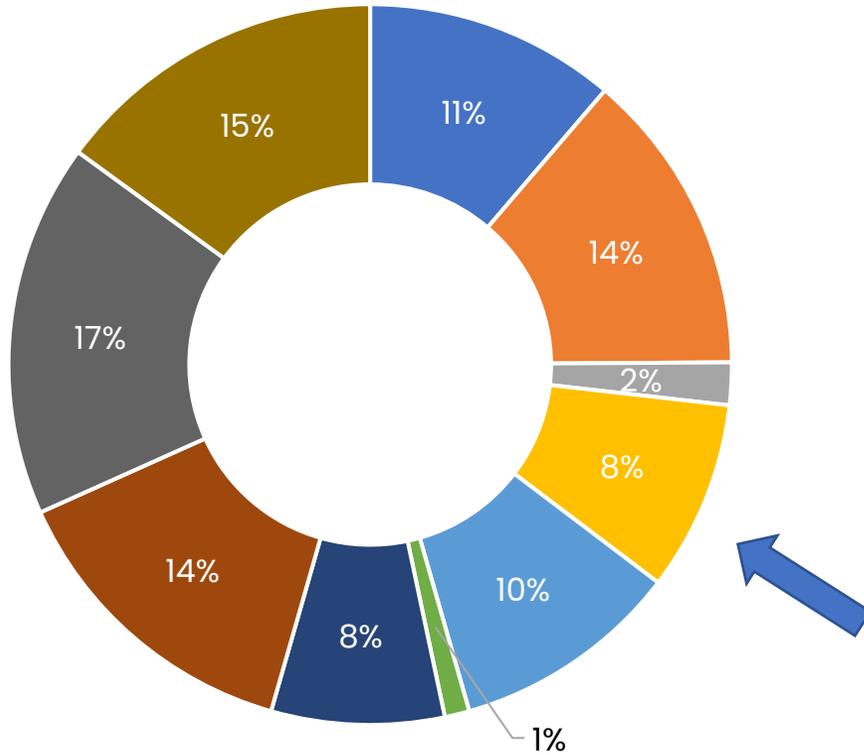
Fresh products – volume variations



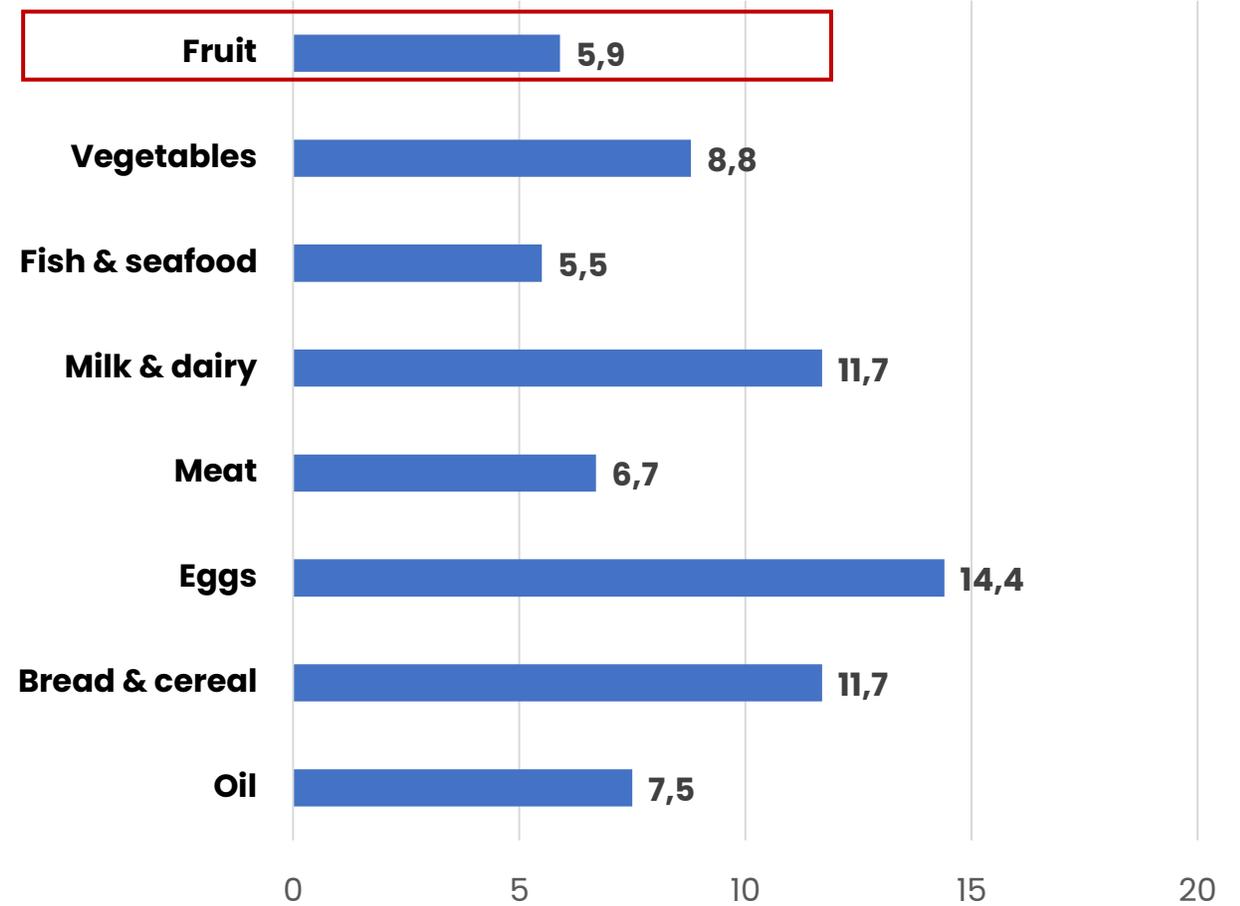
Source: AgriMer

Italy

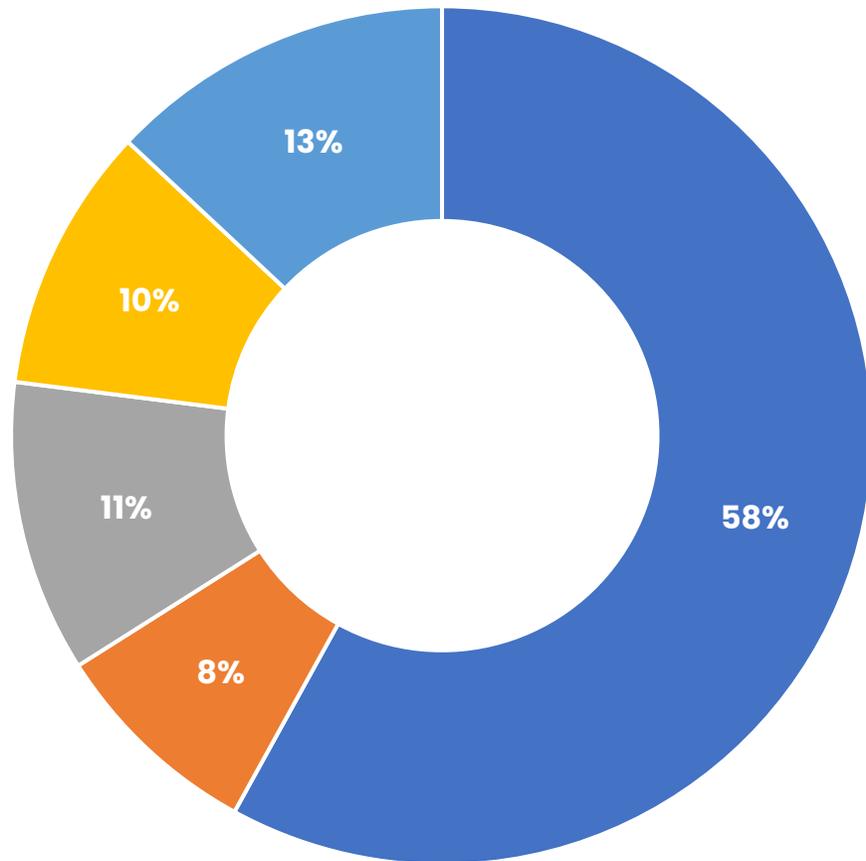
The shopping basket in 2023



Sales value changes (%) - 2023 vs 2022

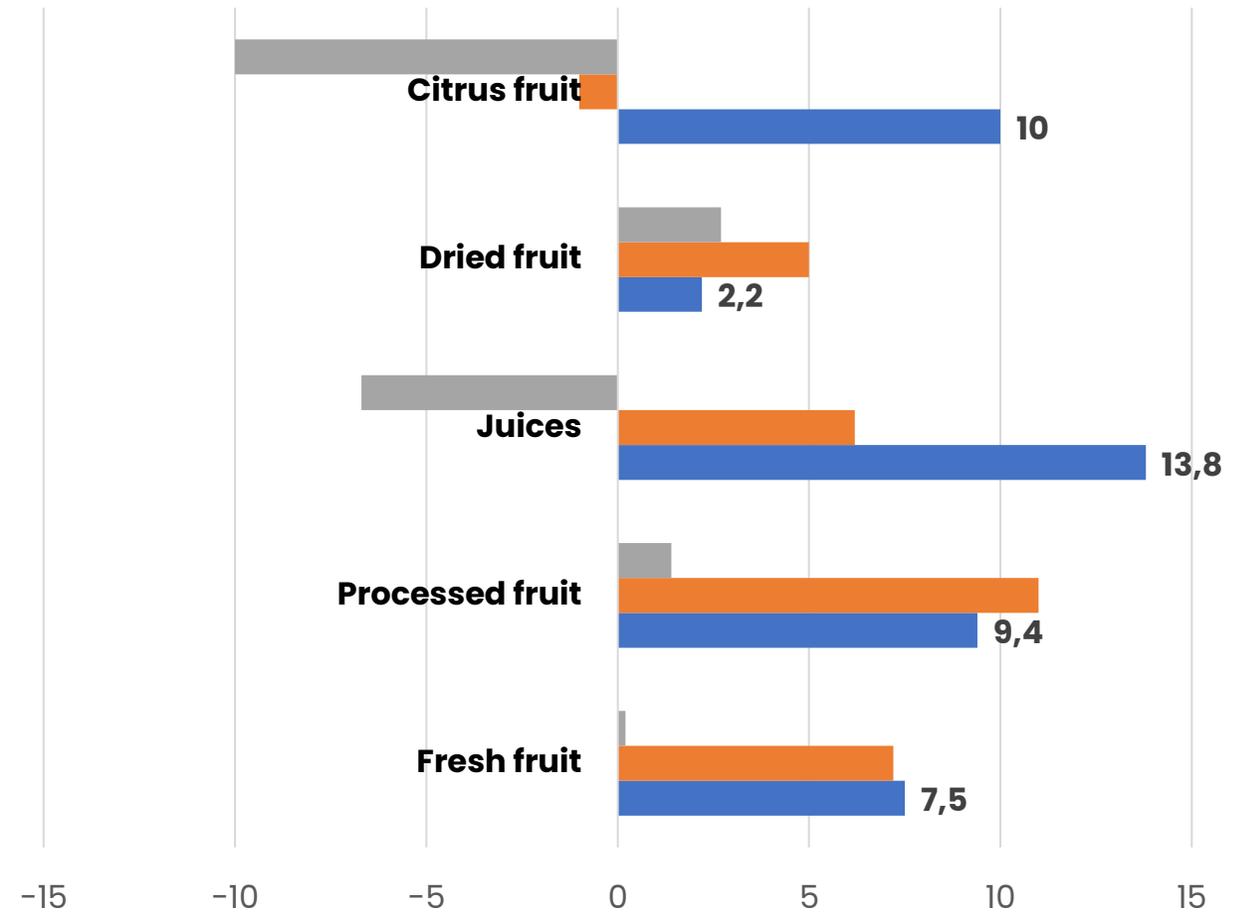


The fruit shopping basket in 2023



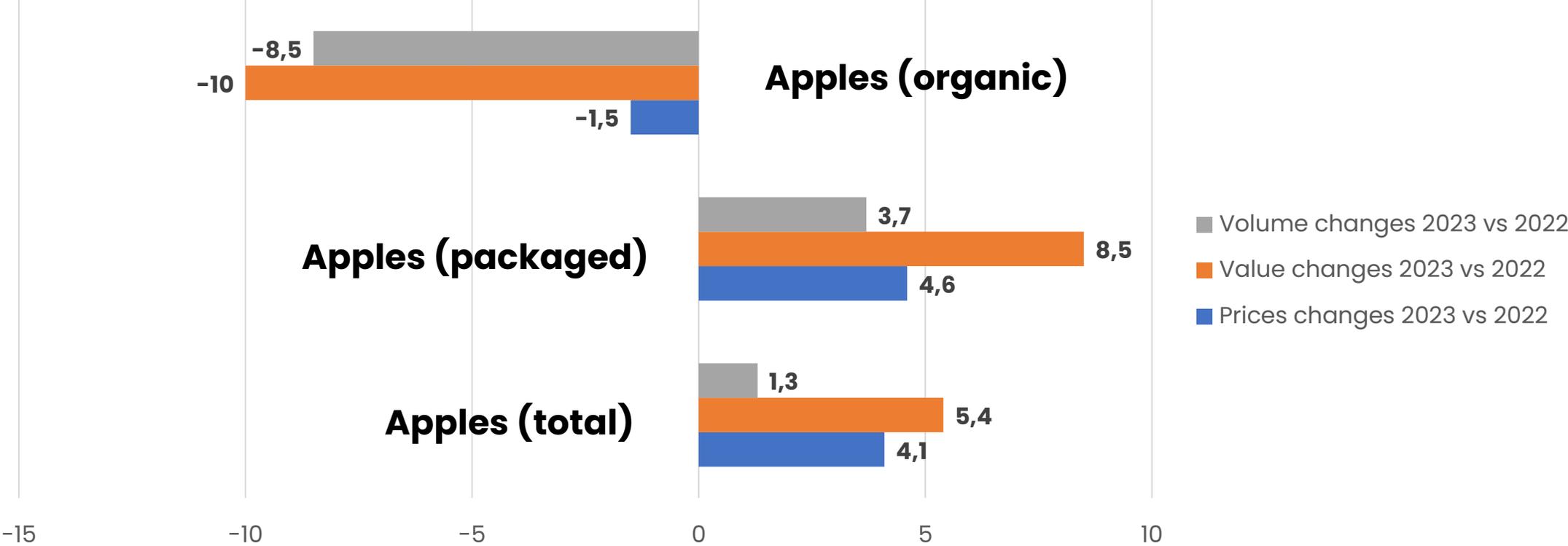
■ Fresh fruit ■ Processed fruit ■ Dried fruit ■ Juices ■ Citrus fruit

Sales value changes (%) - 2023 vs 2022



Focus on apples

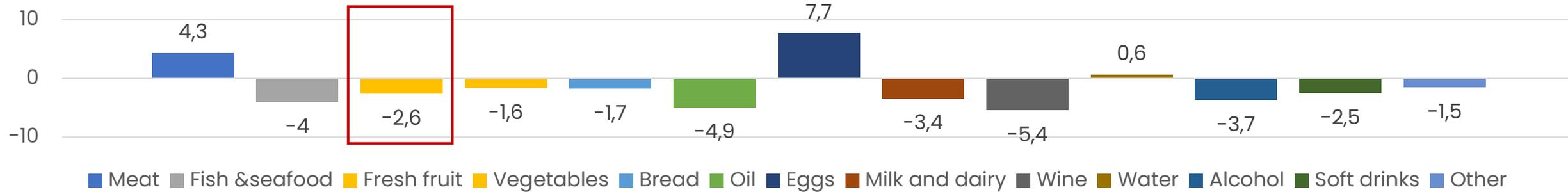
Variations in value, volume and price(%) - 2023 vs 2022



Spain

Fruit consumption in 2023

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



Pro-capita home consumption in volume in Spain in 2023:

- -4,1% for apples;
- -8,7% for pears.

Pro-capita home consumption in value in Spain in 2023:

- +6,5% for apples;
- +1,2% for pears;