TRENDS IN SALES OF FRUIT & VEGETABLE PRODUCTS – A RETAIL PERSPECTIVE

Fruit & Vegetables Market Observatory

18 October 2019

EuroCommerce
for retail & wholesale

Some general trends

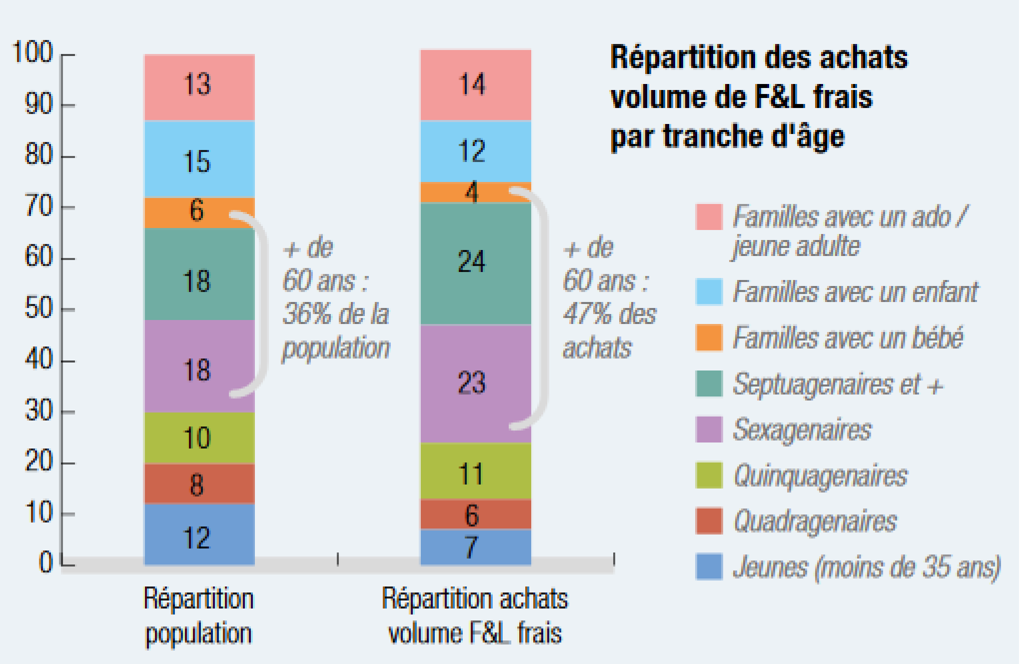
- need to consider all distribution channels when assessing the market
- consumers want healthier food
- price remains key determinant together with origin, quality, convenience, etc.
- processed foods continues to take a larger share of the consumer basket
- in a mature market, SME, local, organic etc. make a higher contribution to growth

France

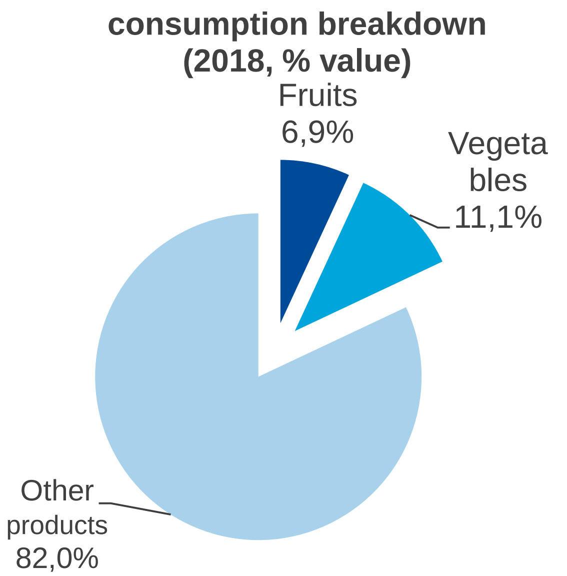
Fruit & vegetables : key data (home consumption)

- The consumption of fruit and vegetables (fresh and processed) represents 33 billion euros, 18% of the French food expenditure
- Fresh fruit and vegetables account for 69% of consumption at home of fruit & vegetables
- The over-60s account for 47% of purchases of fresh fruit and vegetables, whereas they constitute only 36% of the population

Million € 2018	Total	Fruit	Vegetables
Fresh	69%		
Processed	31%		
Total	**32 979**	**12 618**	**20 361**



Source: Kantar Worldpanel - 2018



Source: INSEE - 2018

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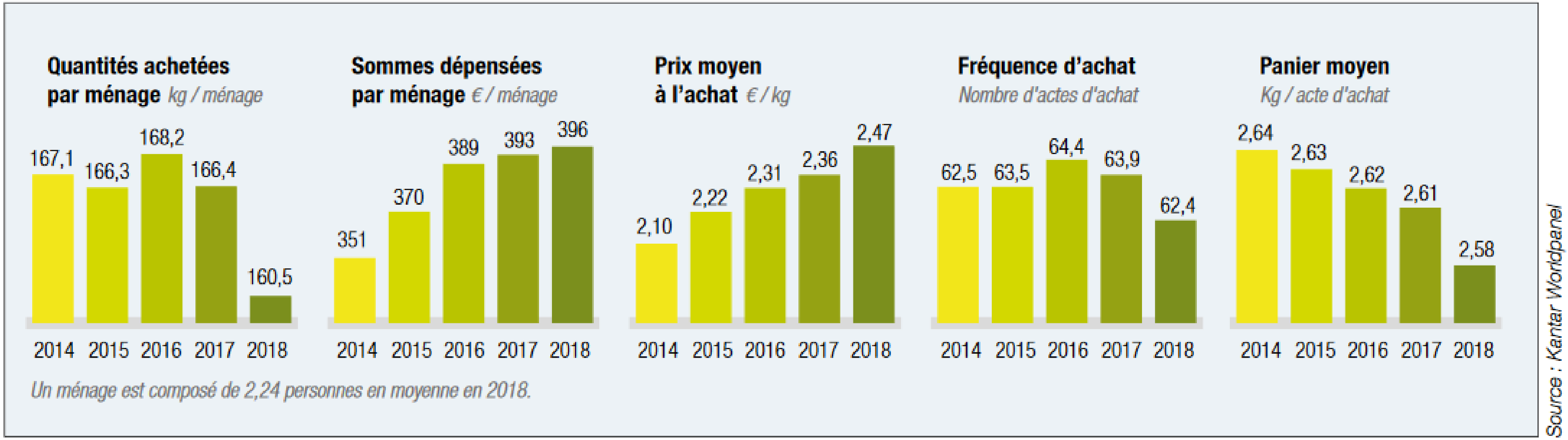
Fruits & vegetable : consumption (at home consumption) **increases in value but decreases in volume**

The **amounts spent per household increased** in 2018 compared to 2017, due to the increase in the average price. Purchases per household in **volume fell**, in line with a further decline in the frequency of purchases and the average basket in volume, a phenomenon also observed for consumer goods and traditional fresh products.
The amount (fresh fruit and vegetables) increased by 12,8% between 2014 and 2018 (45 €),



Source: Kantar Worldpane - 2018l

France

Fruits : period ending 30 june 2019

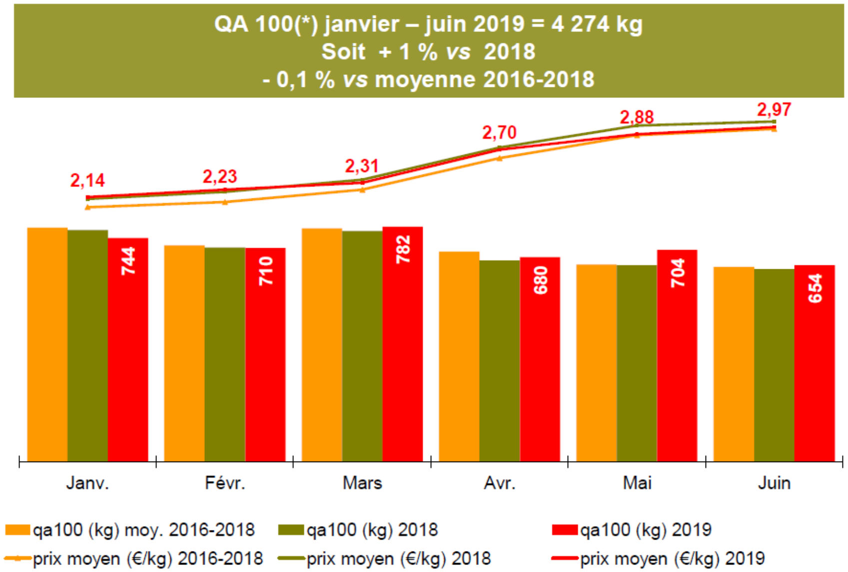
During the first half of 2019, fruit purchases by French households for home consumption amounted to 4.27 tonnes of fruit per 100 households, which is very close to the 2016-18 average and represents a very slight increase (+1%) compared to 2018.

	Quantités achetées / 100 ménages (en kg)		
Année	**Jan-juin 2018**	**Jan-juin 2019**	**Var. %**
Pommes	752	790	+ 5 %
Bananes	784	756	- 4 %
Oranges	713	738	+ 4 %
Clémentines	427	434	+ 2 %
Fraises	203	224	+ 10 %
Poires	207	198	- 4 %
Total fruits	**4 214**	**4 274**	**+ 1 %**

Source : Kantar Worldpanel

FRUITS

Evolution des quantités & prix moyens d'achats



(*) Quantité achetée pour 100 ménages

Source : Kantar Worldpanel

Source: Kantar Worldpanel

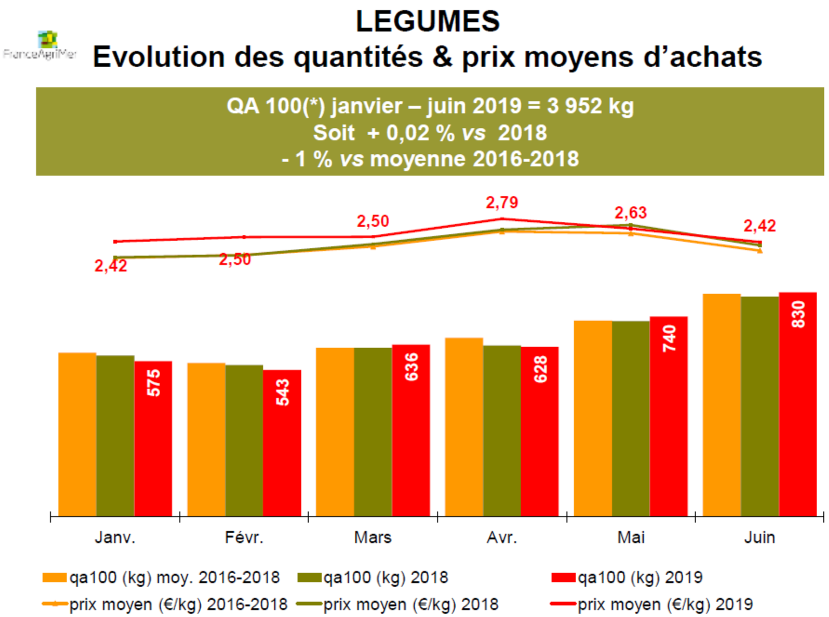
France

Vegetables : period ending 30 june 2019

Purchasing volumes of vegetables are equivalent to those of 2018. Indeed, from January to June 2019, the French have bought, for their home consumption, 3.95 tonnes of vegetables per 100 households, stable vs 2018 and -1% vs 2016-2018 average.

	Quantités achetées / 100 ménages (en kg)		
Année	Jan-juin 2018	Jan-juin 2019	Var. %
Tomates	646	624	- 3 %
Carottes	466	474	+ 2 %
Endives	288	280	- 3 %
Courgettes	268	280	+ 4 %
Salades	259	252	- 3 %
Oignons	223	226	+ 1 %
Tot. légumes	3 951	3 952	0%

Source : Kantar Worldpanel



(*) Quantité achetée pour 100 ménages

Source : Kantar Worldpanel

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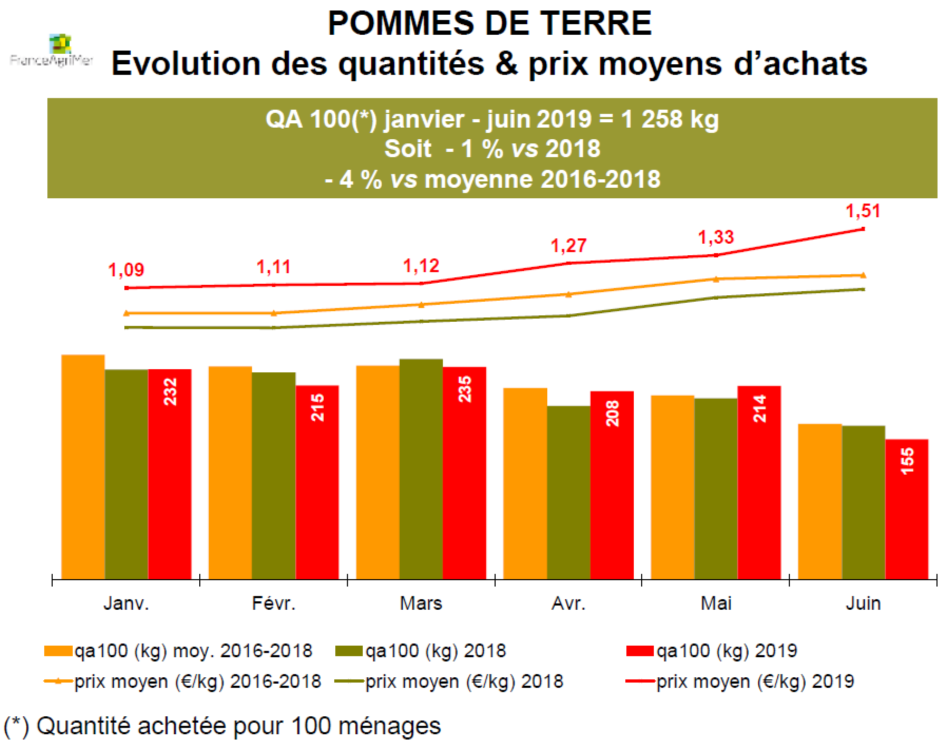
France

Potatoes : period ending 30 june 2019

Over the period January - June 2019, the total purchases of potatoes by households for their consumption represent 1.3 tonnes per 100 households, a decrease of -1% compared to the year and -4% compared to the average 2016-2018.

Retail prices are higher than the campaign as well as the average 2016-2018.

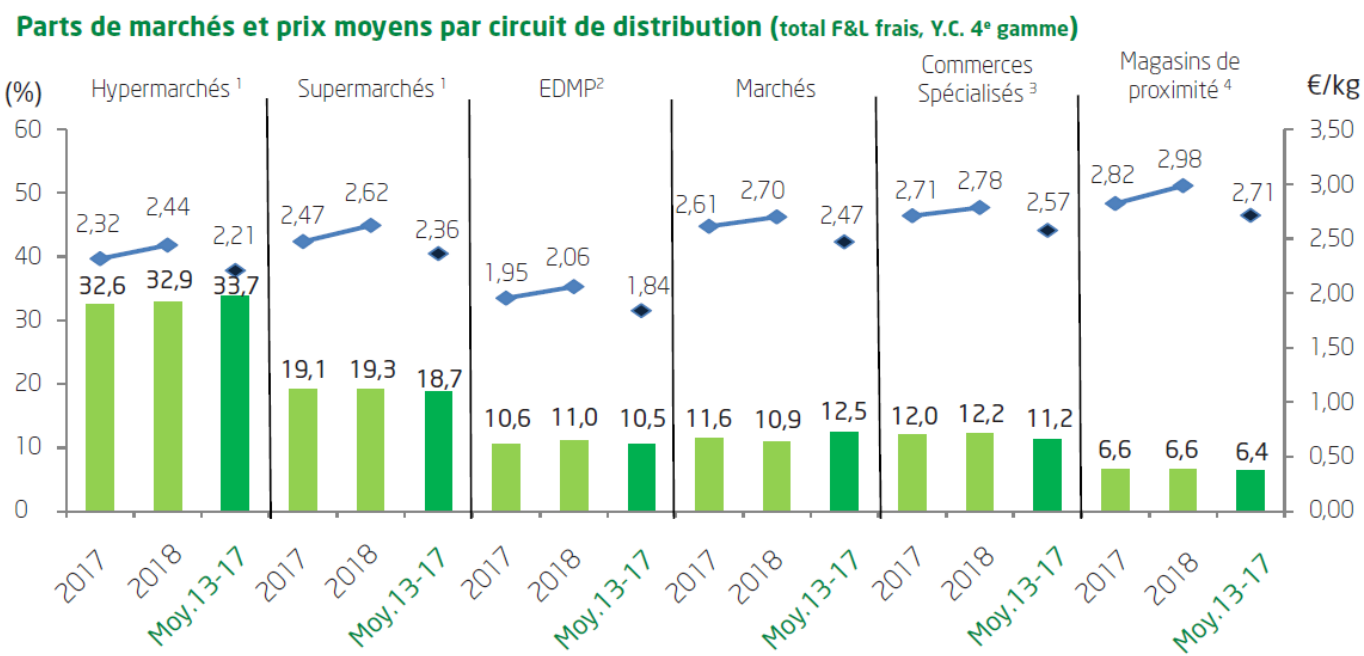


Source : Kantar Worldpanel

France

The retailers : market shares

Hypermarkets, supermarkets and discounters account for 65% of sales (value) of fresh fruit and vegetables in 2018. Outdoor markets and specialized shops represent 23% of sales.



[1] hors "On-line"
[2] Enseigne à dominante marque propre (anciennement Hard-Discount)
[3] Primeurs et grandes surfaces frais
[4] Supérettes et enseignes généralistes de proximité

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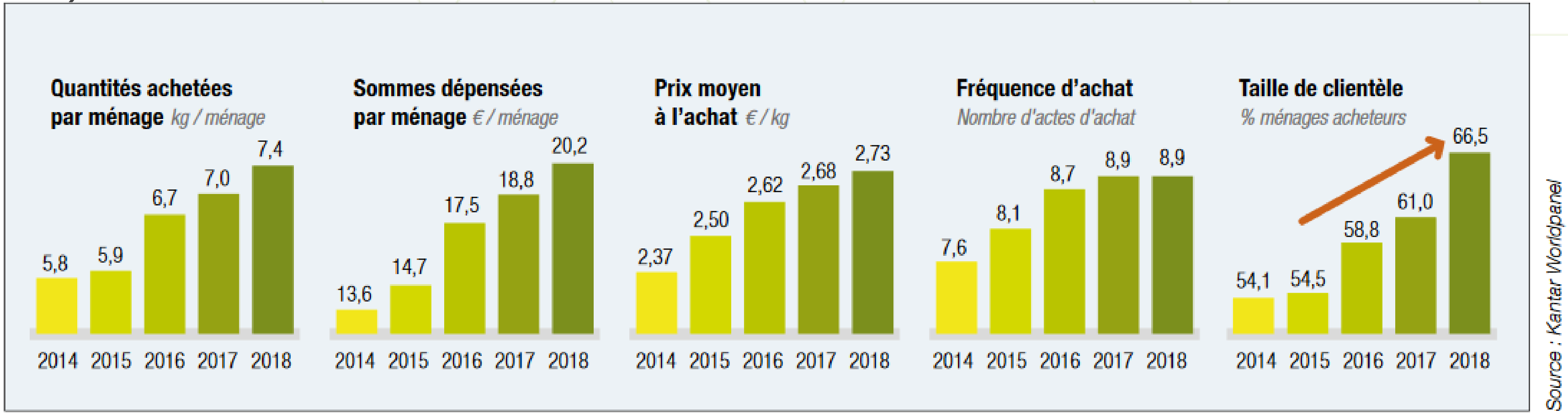
France

Fruits & vegetable : organic market (fresh products)

Consumption of organic fruit and vegetables amounted to €1.7 billion in 2018 (896 million for fruit, 807 million for vegetables) vs 722 million in 2013. This represents 19% of French consumption of organic products. The market share of hyper & supermarkets is 34% (vs 49% on the entire organic market). [Source : Agence Bio]

In 2018, all organic consumption indicators continued to rise, at a stable pace compared to 2017. The increase in purchases in volume and value was made possible by the development of purchases through the significant recruitment of new buyers in 2018 (increase in customer size by more than 5 points in one year).



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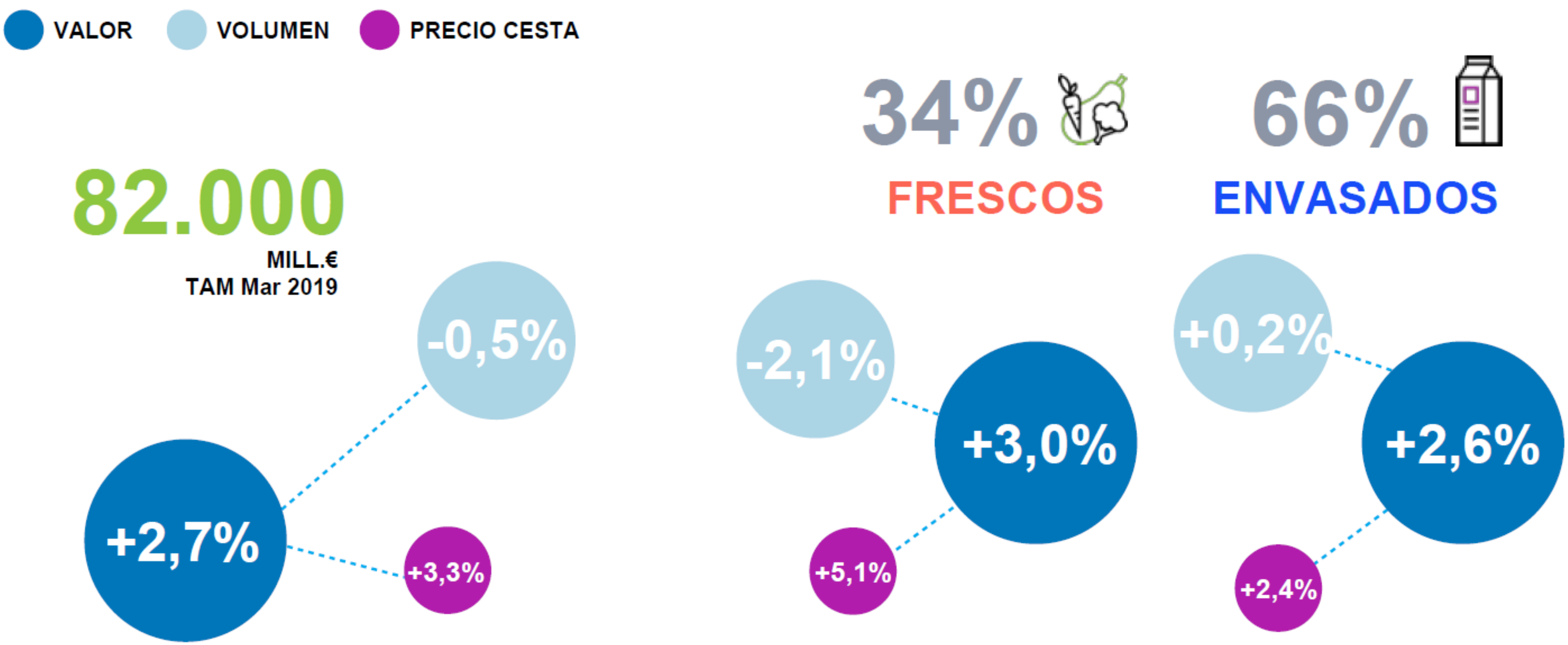
Spain: slightly decreasing demand, especially for fresh products

EL ÚLTIMO AÑO ESTÁ MARCADO POR UNA MODERADA CAÍDA DE LA DEMANDA, CONCENTRADA EN FRESCOS



Fuente Nielsen Total Mercado(Envasados+ Frescos), incluye Canarias

Hiper+Super+Tradicionales+Espec DPH+Espec Frescos, TAM Mar 2019

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Fruits and vegetable prices have increased, leading to lower volumes

DONDE CONTINÚA EL INCREMENTO DE PRECIOS EN FRESCOS

VALOR · VOLUMEN · PRECIO CESTA

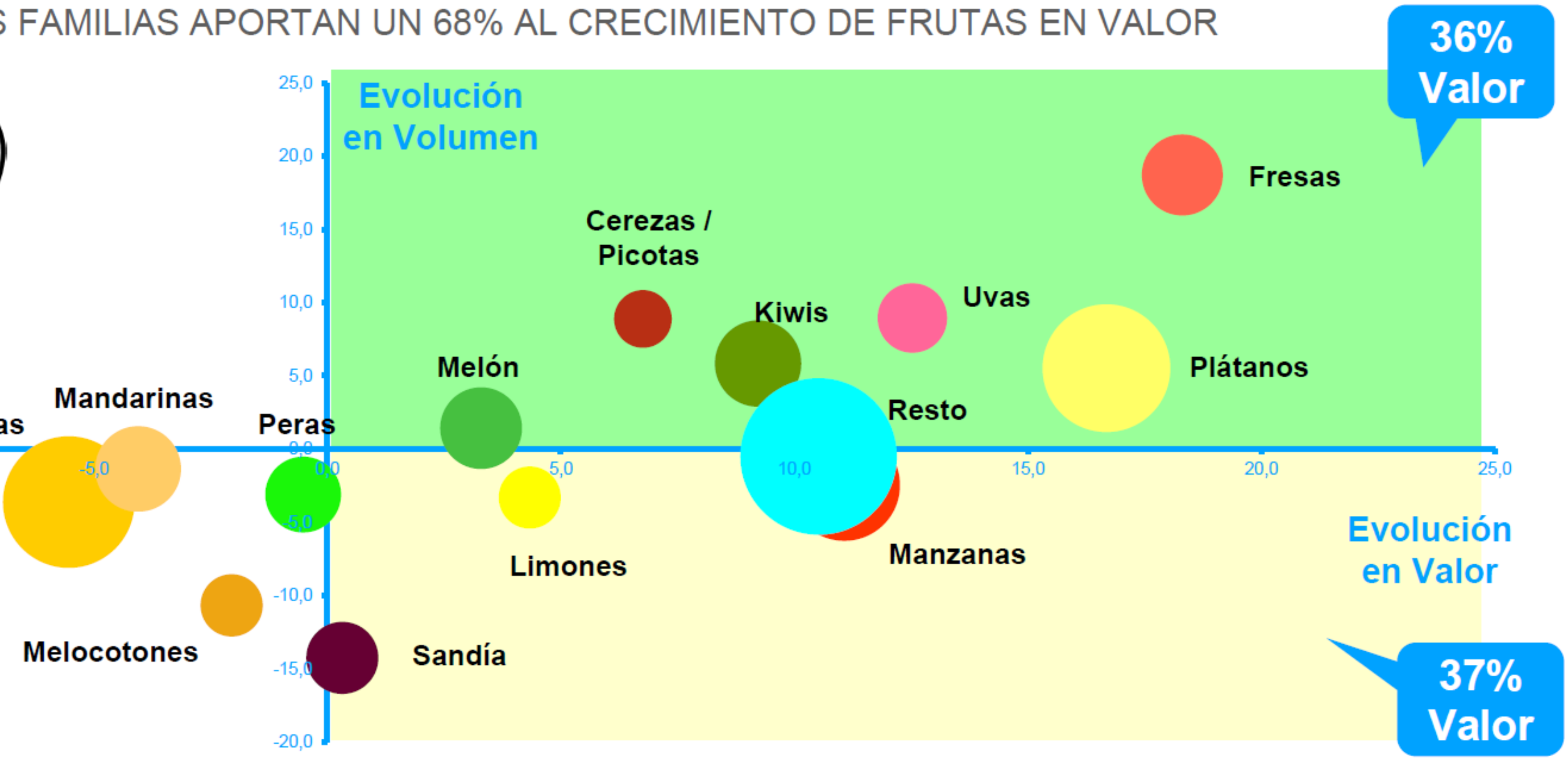
	VALOR	VOLUMEN	PRECIO CESTA
TOTAL FRESCOS	+3,0%	-2,1%	+5,1%
Carne	+3,3%	+0,6%	+2,8%
Fruta	+6,1%	-1,6%	+7,9%
Verdura	+8,7%	-2,8%	+11,9%
Pescado	-4,7%	-6,8%	+2,2%
Huevos	+6,6%	+0,6%	+6,0%
Pan	-0,1%	-3,4%	+3,5%

Fuente Nielsen Total Mercado(Envasados+ Frescos), incluye Canarias

Spain: more than a third of the fruits turnover is made with dynamic categories in volume

MÁS DE UN TERCIO DE LA FACTURACIÓN DE FRUTAS SE REALIZA CON CATEGORÍAS DINÁMICAS EN VOLUMEN

ESTAS FAMILIAS APORTAN UN 68% AL CRECIMIENTO DE FRUTAS EN VALOR



uente: Scantrack+ Homescan :Total Gasto en Productos Frescos - Hipermercados + Supermercados + Tradicional + Especialista – TAM Marzo 2019

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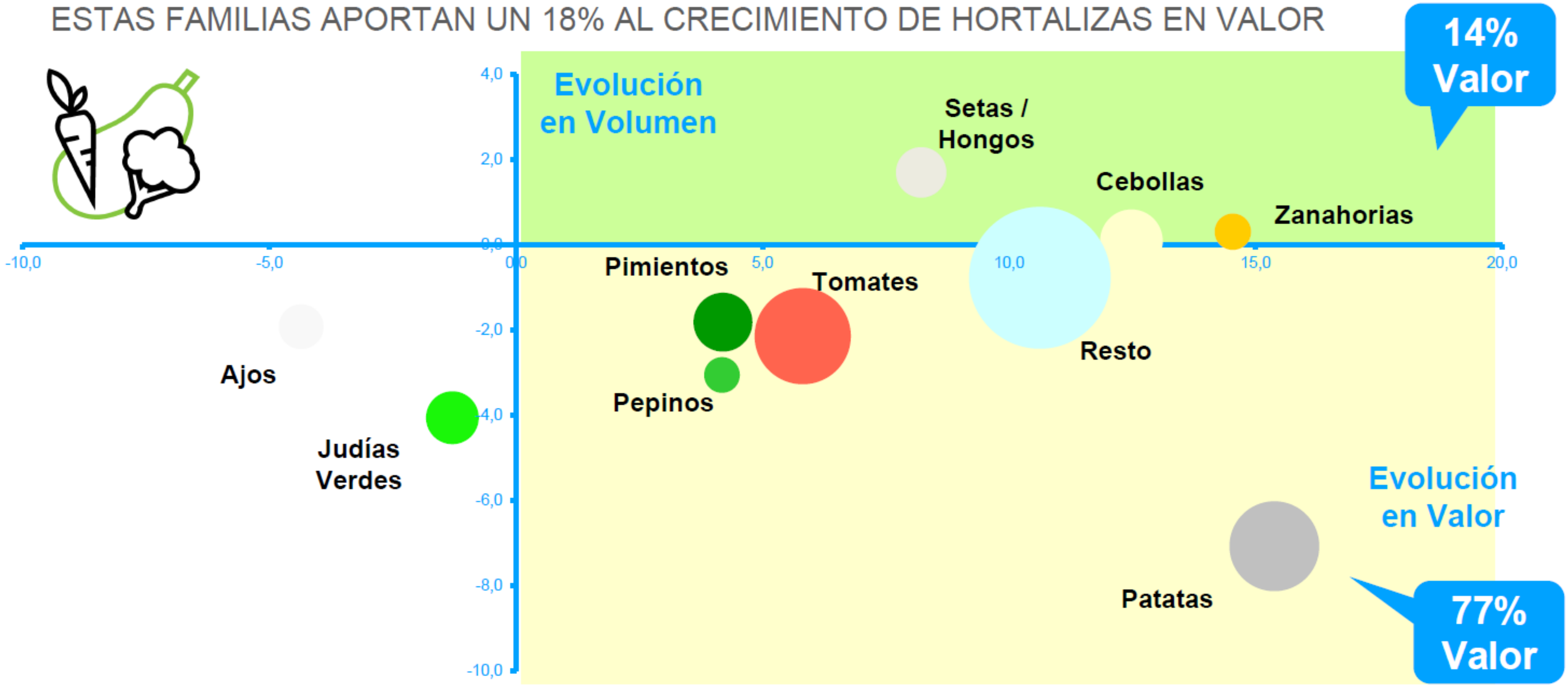
Spain: less than 15% of the vegetables turnover is achieved in dynamic categories in volumes

MENOS DE UN 15% DE LA FACTURACIÓN DE HORTALIZAS SE REALIZA CON CATEGORÍAS DINÁMICAS EN VOLUMEN

ESTAS FAMILIAS APORTAN UN 18% AL CRECIMIENTO DE HORTALIZAS EN VALOR



Fuente: Scantrack+ Homescan :Total Gasto en Productos Frescos - Hipermercados + Supermercados + Tradicional + Especialista – TAM Marzo 2019