

# Consumption, prices and variety development 2022/23

THE EXPERT GROUP FRUIT AND VEGETABLES MARKET OBSERVATORY SUBGROUP  
PIP FRUIT

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*natürlich informiert.*

## European market – consumption, prices and variety structure



# How do the trade and the consumer act?

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Discounters get more business  
Full - range stores → Discounters  
Direct marketing loses strongly

More price-conscious shopping.



Positive sales trend at Bioware stopped.



**Netto**  
Marken-Discount

Free market?  
Dictate of the food retailers

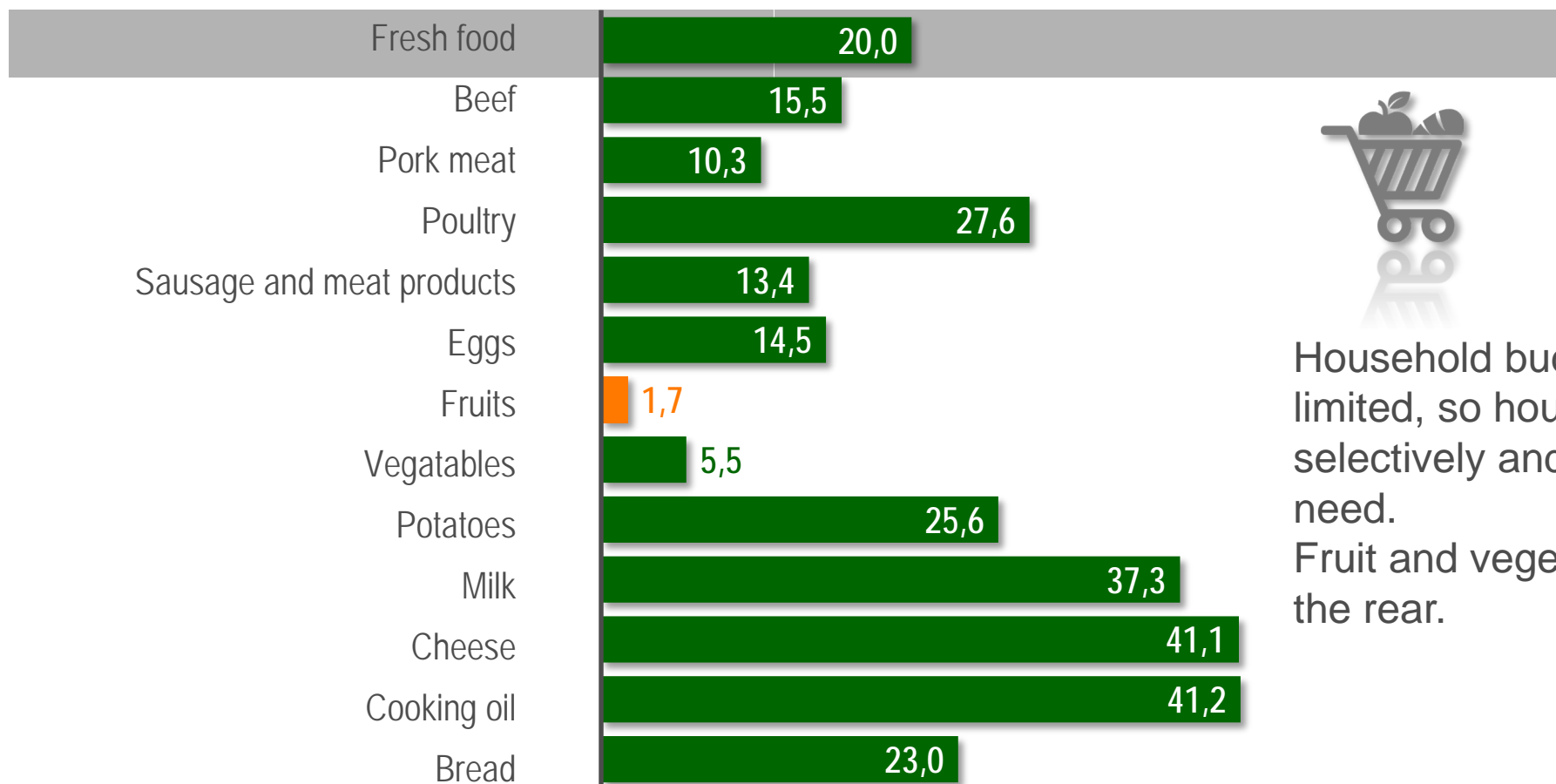
Food retailers – no empathy for higher production costs.



# Fruits with low retail prices

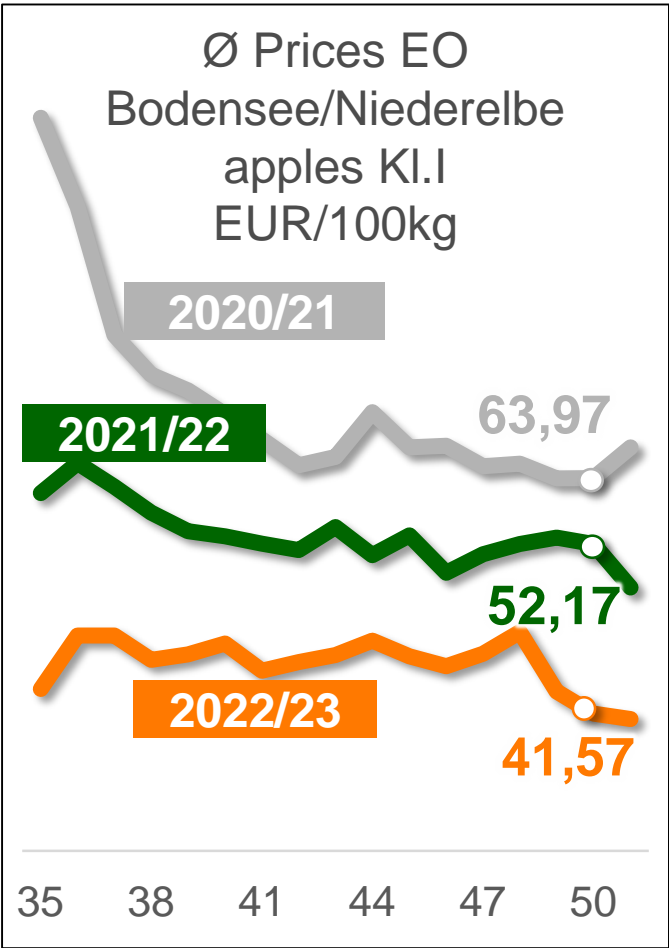
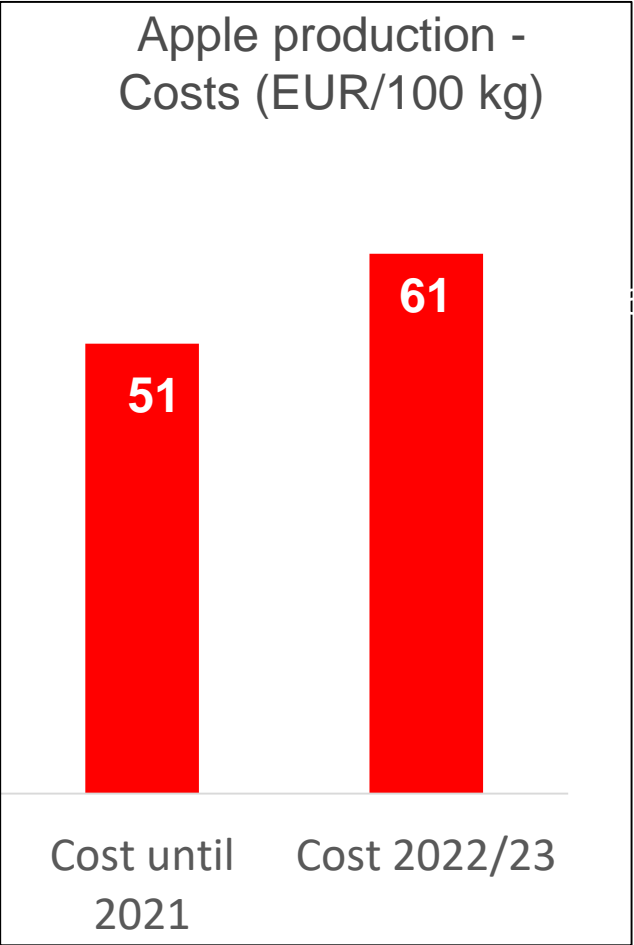


Rates of change in consumer prices for fresh food from conventional production in Germany, January 2023 vs. 2022 in %



Household budgets are limited, so households shop selectively and according to need. Fruit and vegetables bring up the rear.

# Insanity - apple market out of control



Netto - action in week 49

**1 CENT KNALLER**  
AB 30 €<sup>2</sup> EINKAUFSWERT

Diese 5 Artikel erhältst du für jeweils **1 Cent.**

Pro Artikel nur 1 Packung/Stück

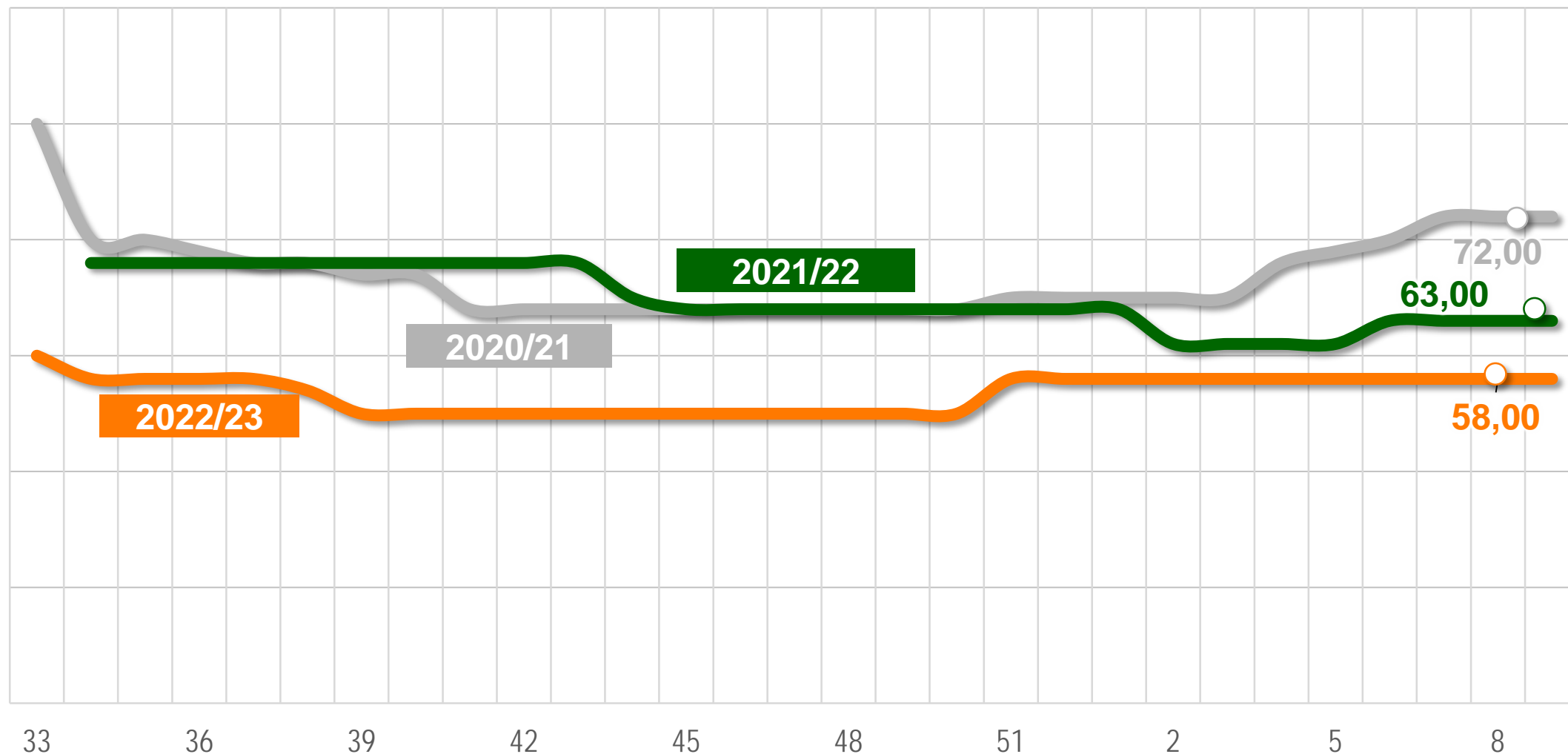
\*Ausgenommen sind Fleisch, Tabakerzeugnisse, Buch- und Freizeitschriften, Tinten- und Schreibwaren, Spielzeug, Kleider, Schmuck, Kosmetik, Haushaltswaren, Gartengeräte und Gartengeräte.

Artikel	Sorte	Verpackung	Aktion
Auberginen	Spanien, Kl. I	Stück	Aktion 0.01
Birnen	Belgien/Holland, Kl. I	Sorte: siehe Verpackung 1 kg Schale	Aktion 0.01
Rosenkohl	Deutschland, Kl. I	750 g Netz	Aktion 0.01
Tomaten	Marokko, Kl. I	500 g Schale	Aktion 0.01
Grapefruit	Spanien, Kl. I, Sorte: siehe Karte-Etikett, 500g	Stück	Aktion 0.01

# Prices under pressure

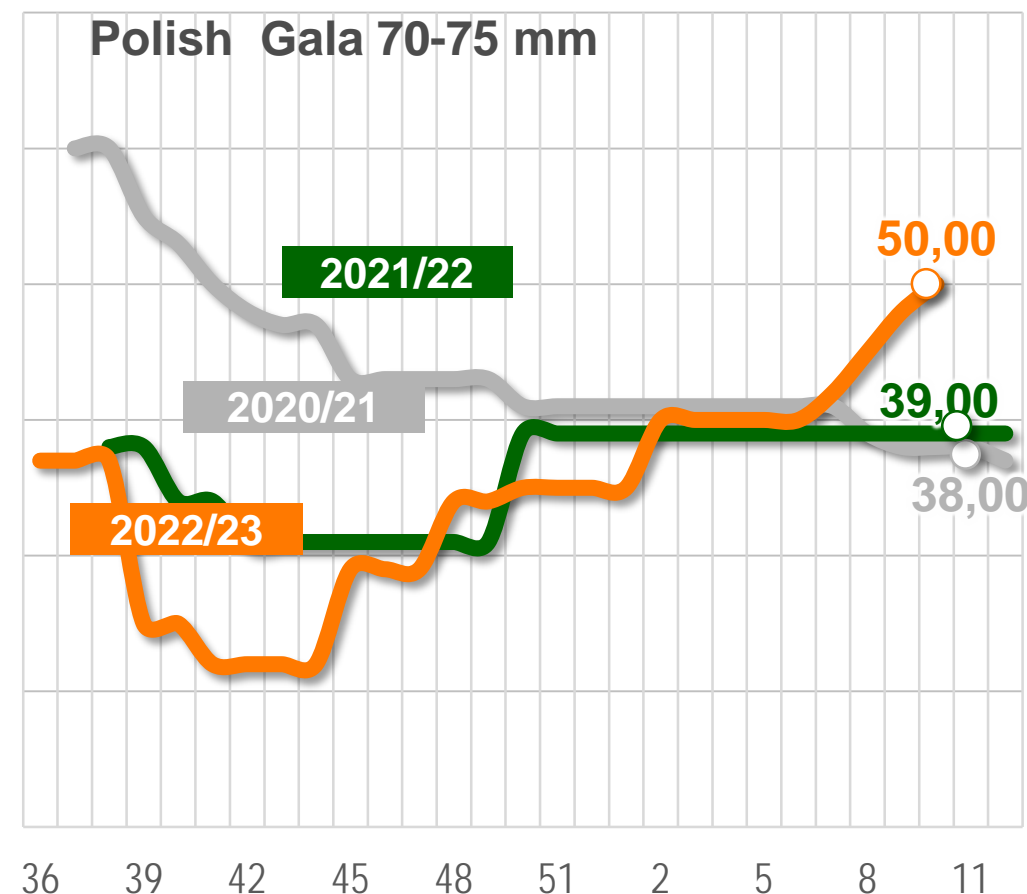
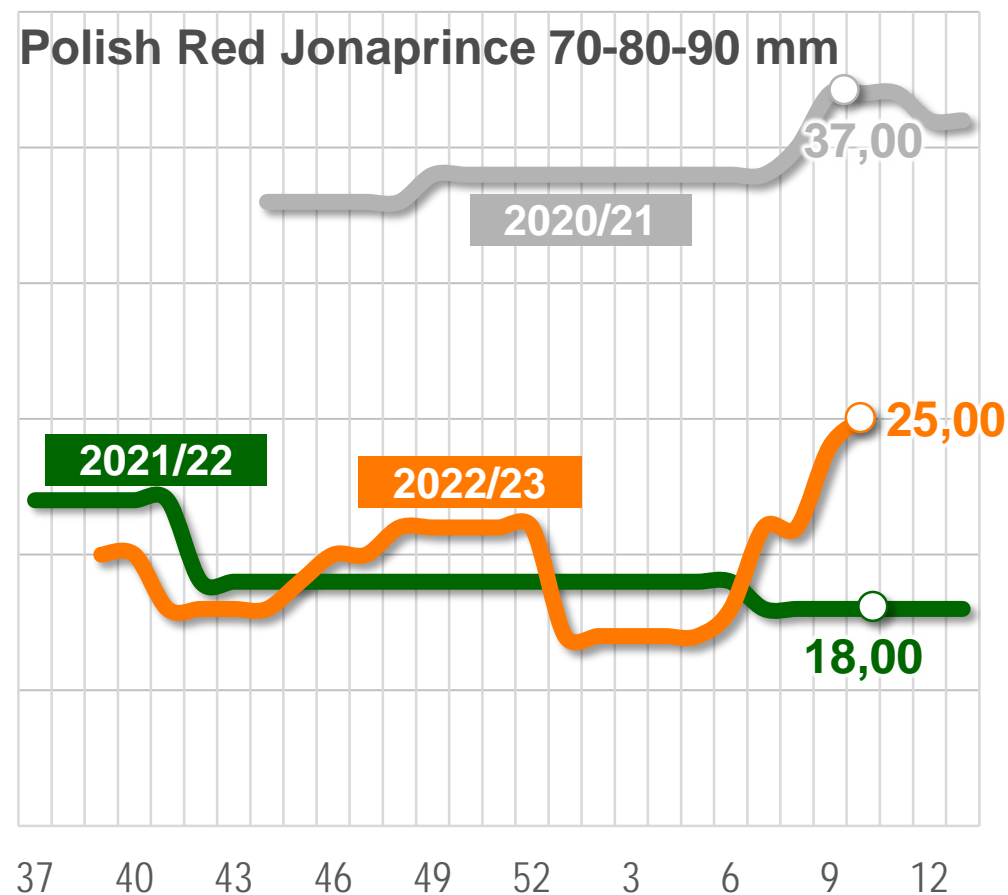


South Tyrol – weekly prices ex region, Class I in EUR/100 kg



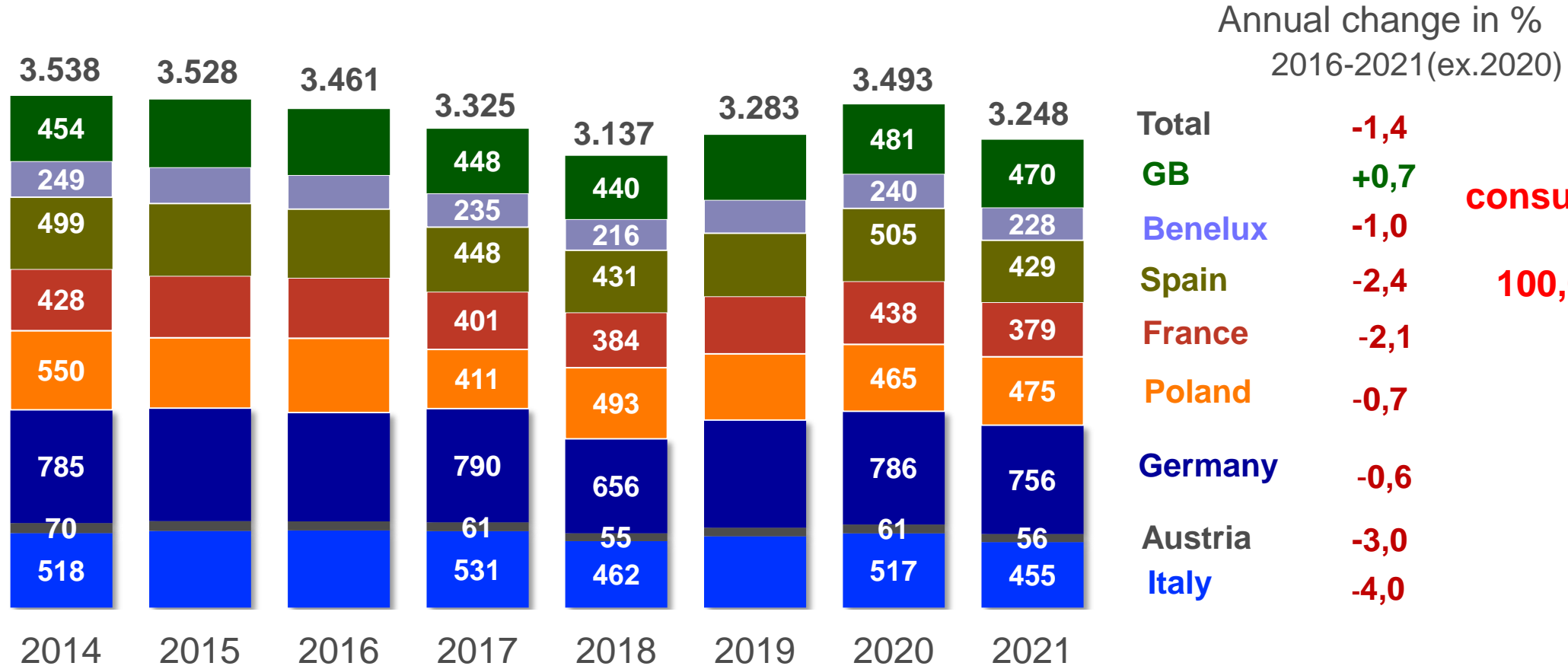
# Slightly increasing prices

Weekly prices ex region, Class I in EUR/100 kg



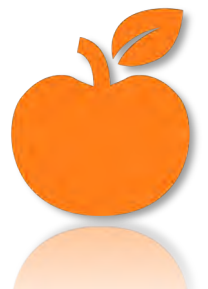
# Declining apple consumption

Apple purchases in the most important EU countries, in 1,000 t



Total	-1,4
GB	+0,7
Benelux	-1,0
Spain	-2,4
France	-2,1
Poland	-0,7
Germany	-0,6
Austria	-3,0
Italy	-4,0

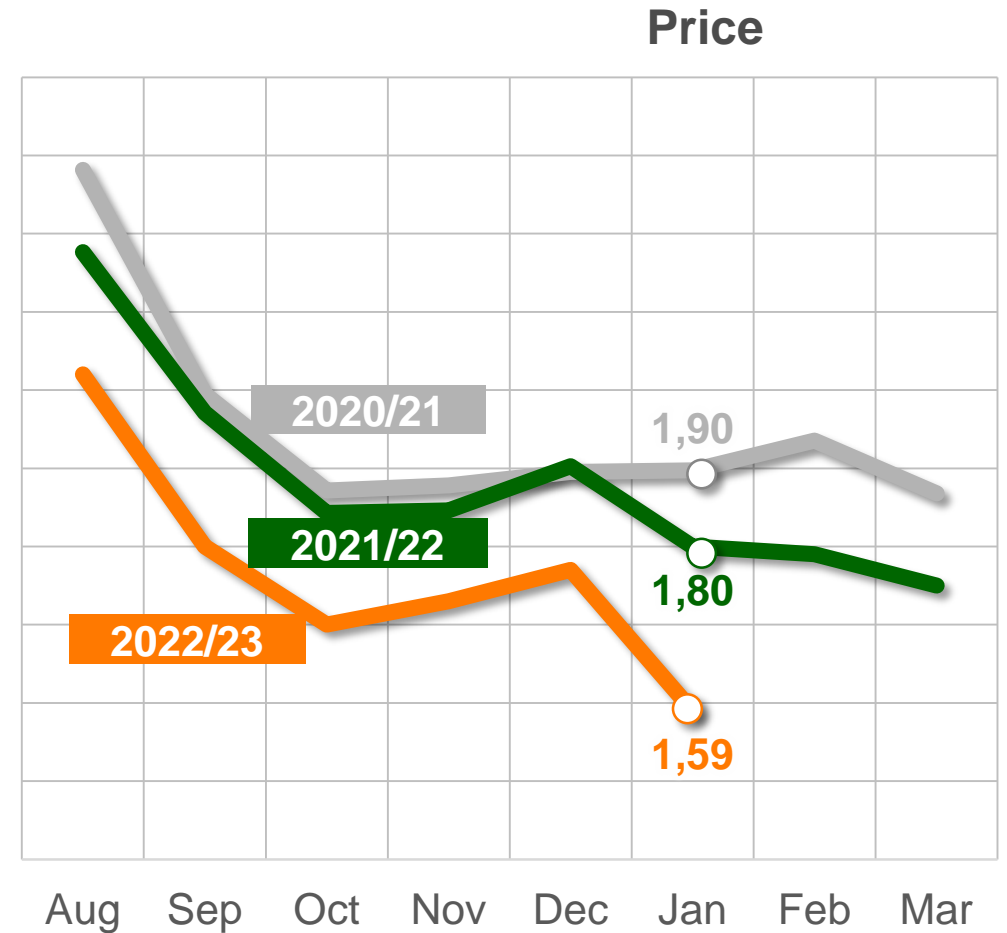
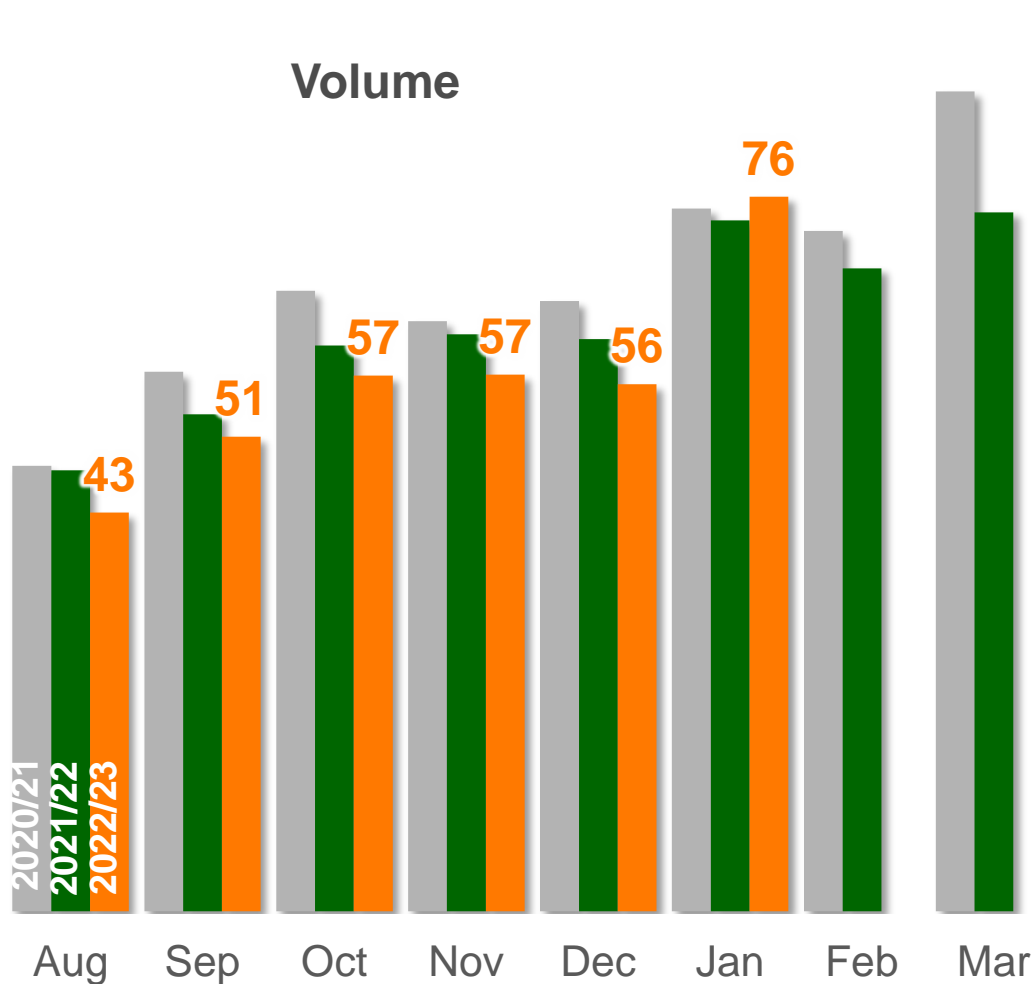
**Annual  
consumption loss in  
the EU  
100,000 t dessert  
apples**





# More buying volume, but cheap prices

Monthly apple buying volume German household and retail price, in 1.000 t and EUR/kg

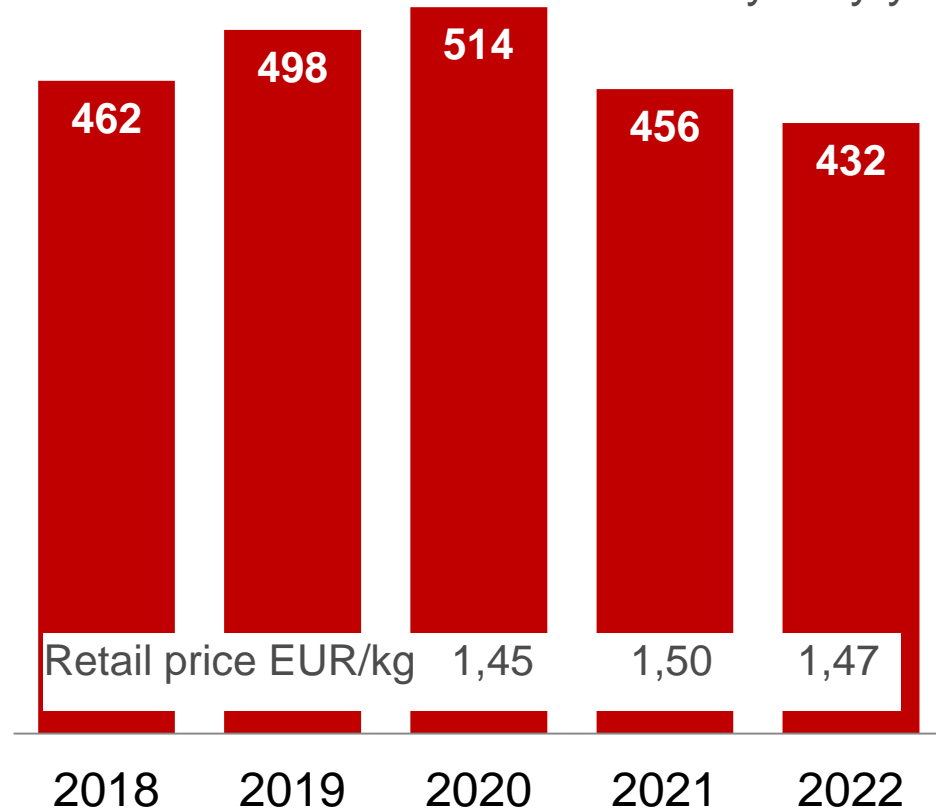


# Italian and French apple consumption

Apple consumption, in 1.000 t



Italy – by year



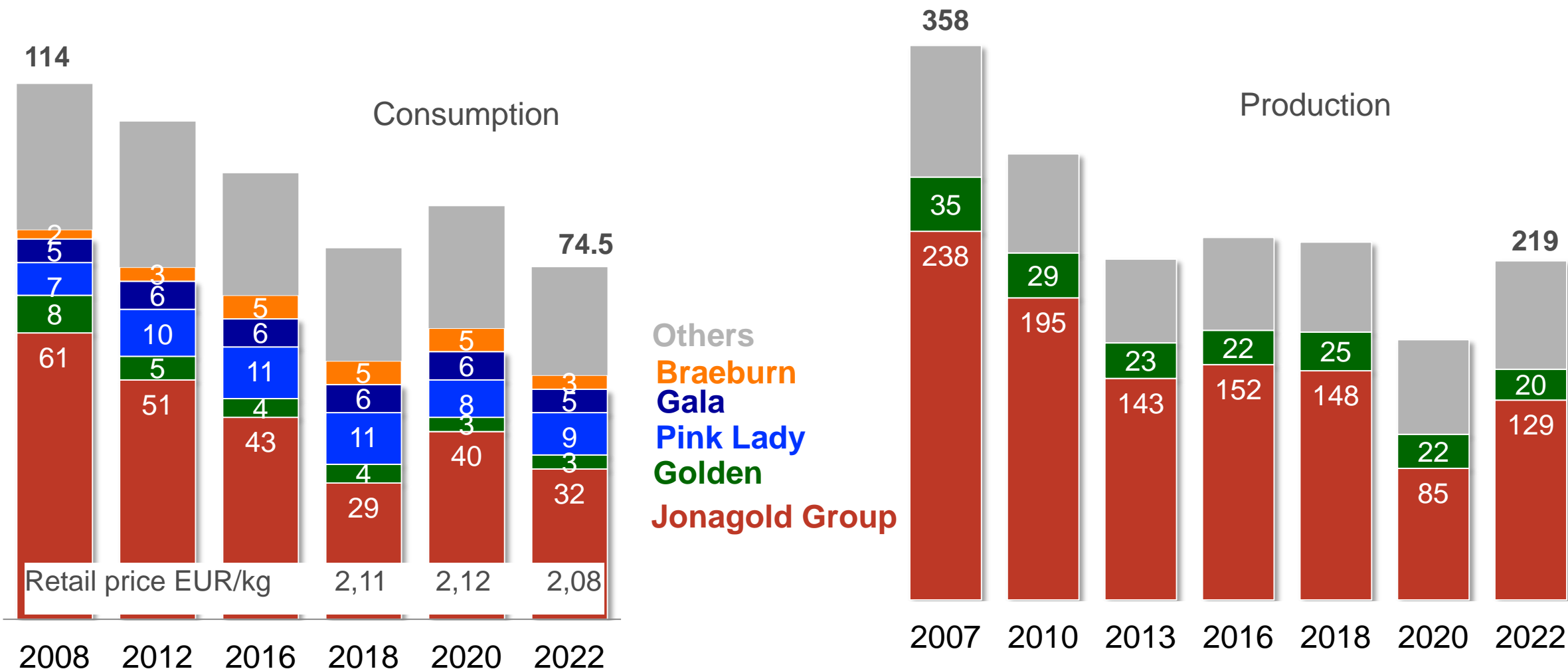
France August to January



# Belgium apple market – Loser Jonagold



Belgium – Apple consumption and domestic production, in 1.000 t

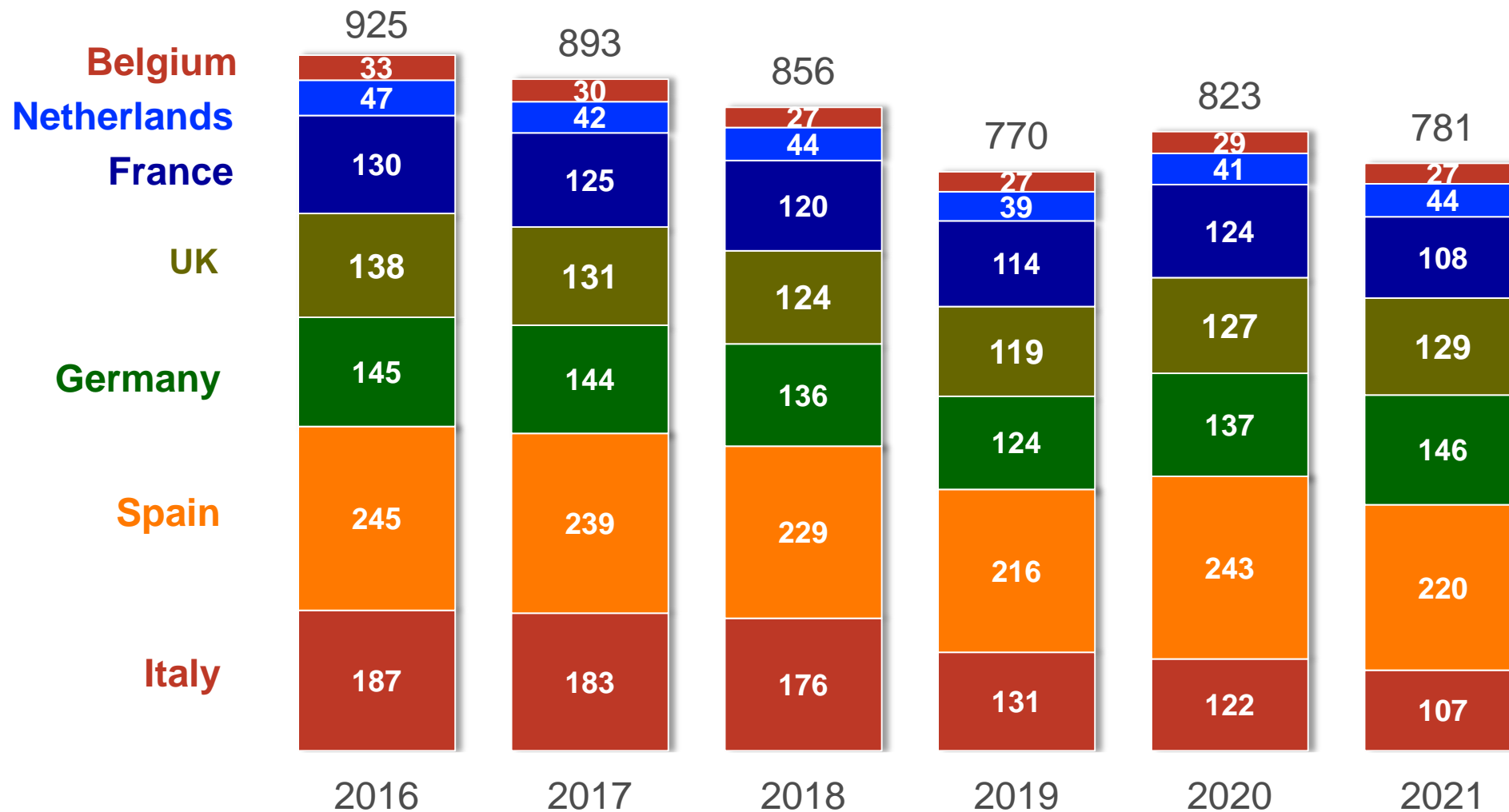


## European market – consumption, prices and variety structure



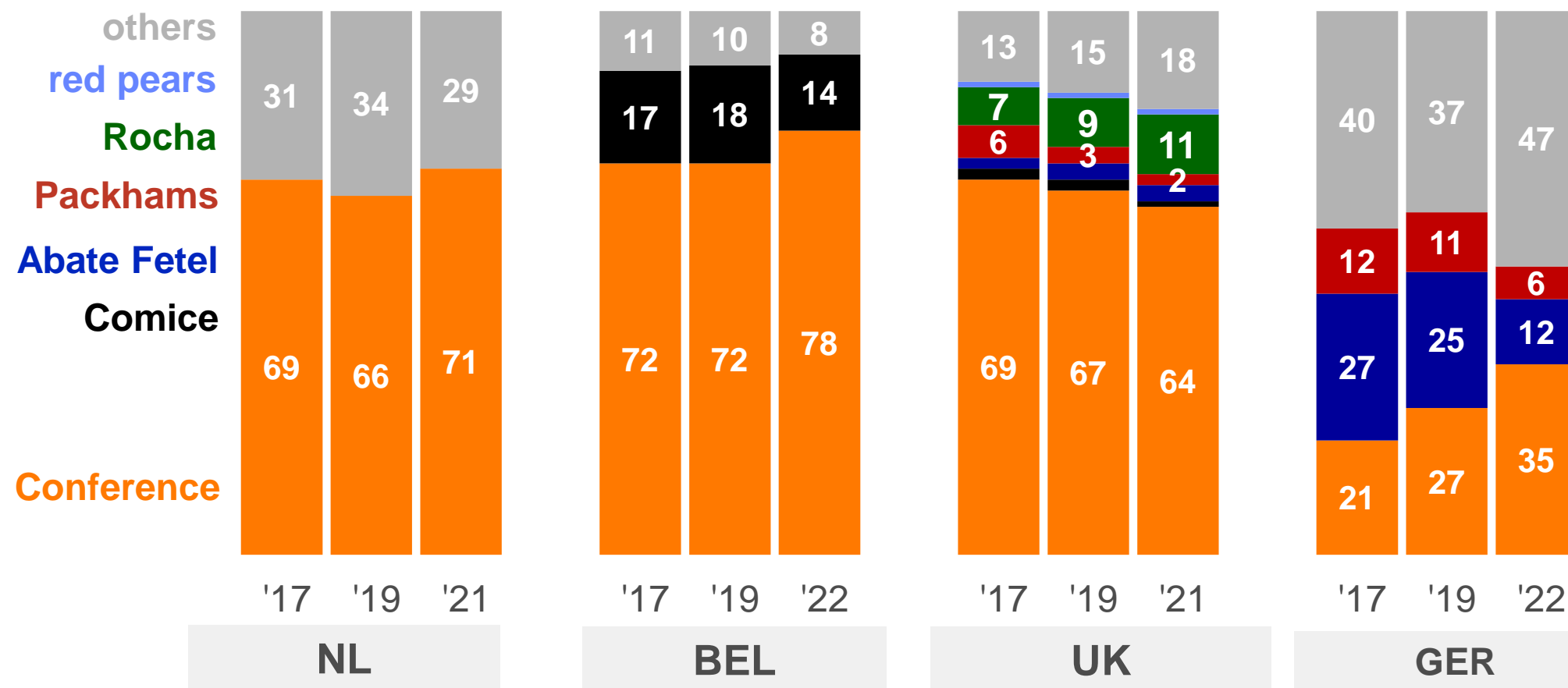
# Consumption on a lower level, but stable

Pear consumption in important EU countries, in 1.000 t



# Conference the No. 1

Consumption - Market share of Conference in important countries, in %

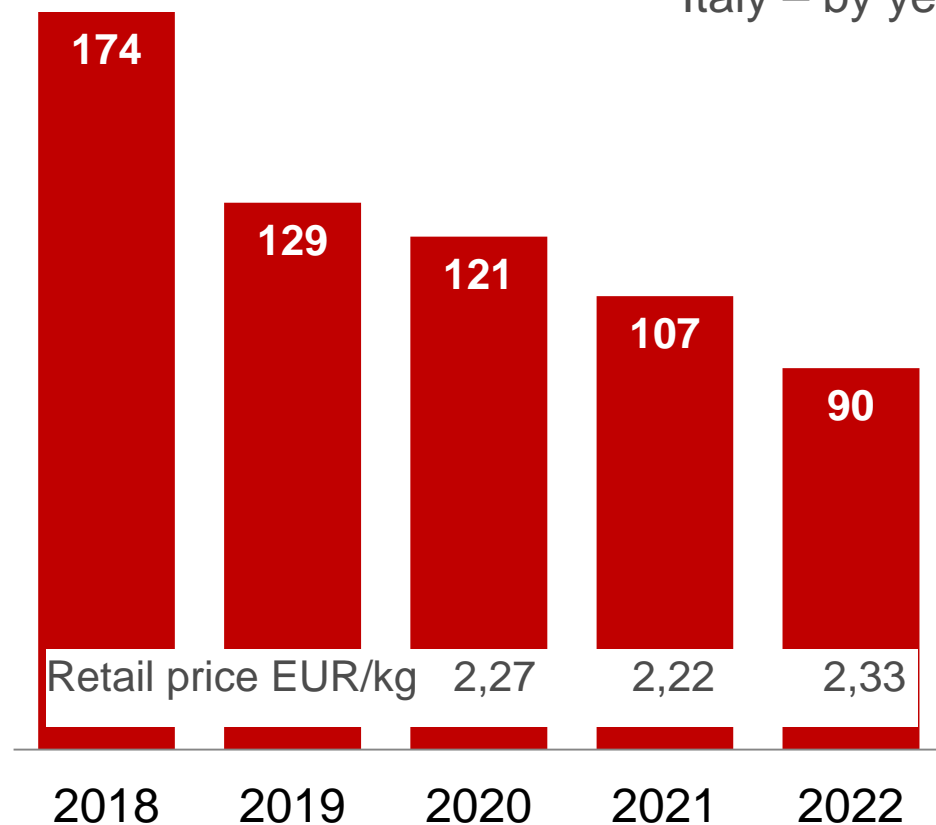


# Italian and French pear consumption

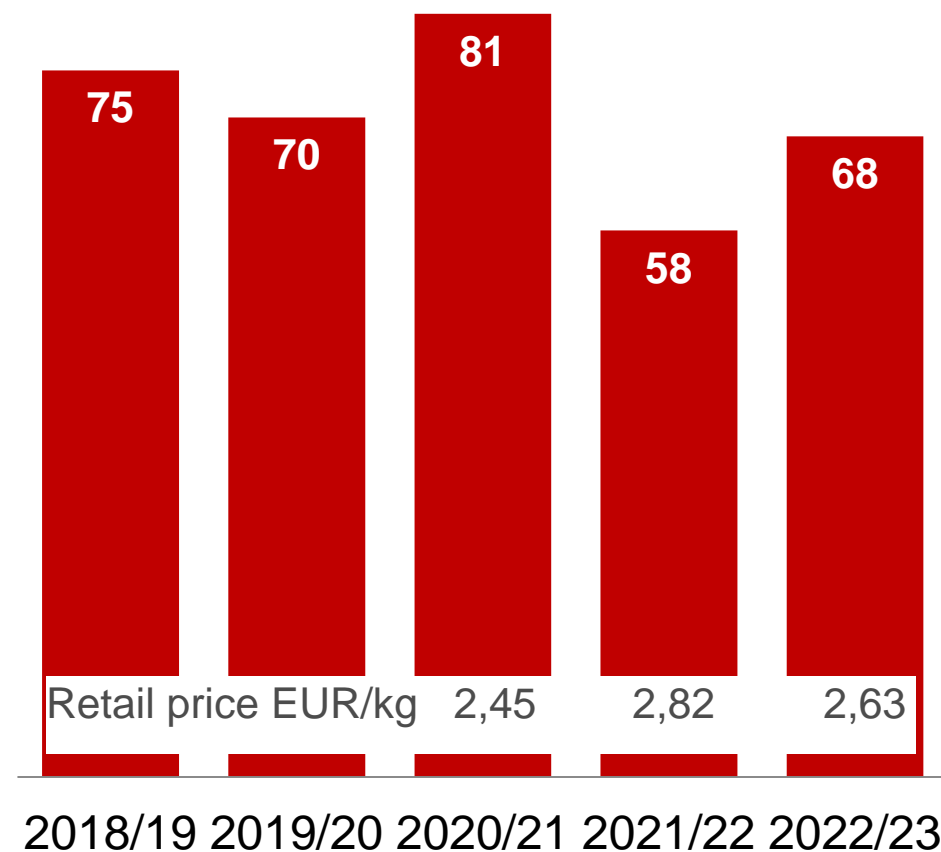
Pear consumption, in 1.000 t



Italy – by year



France August to January

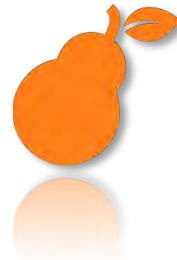
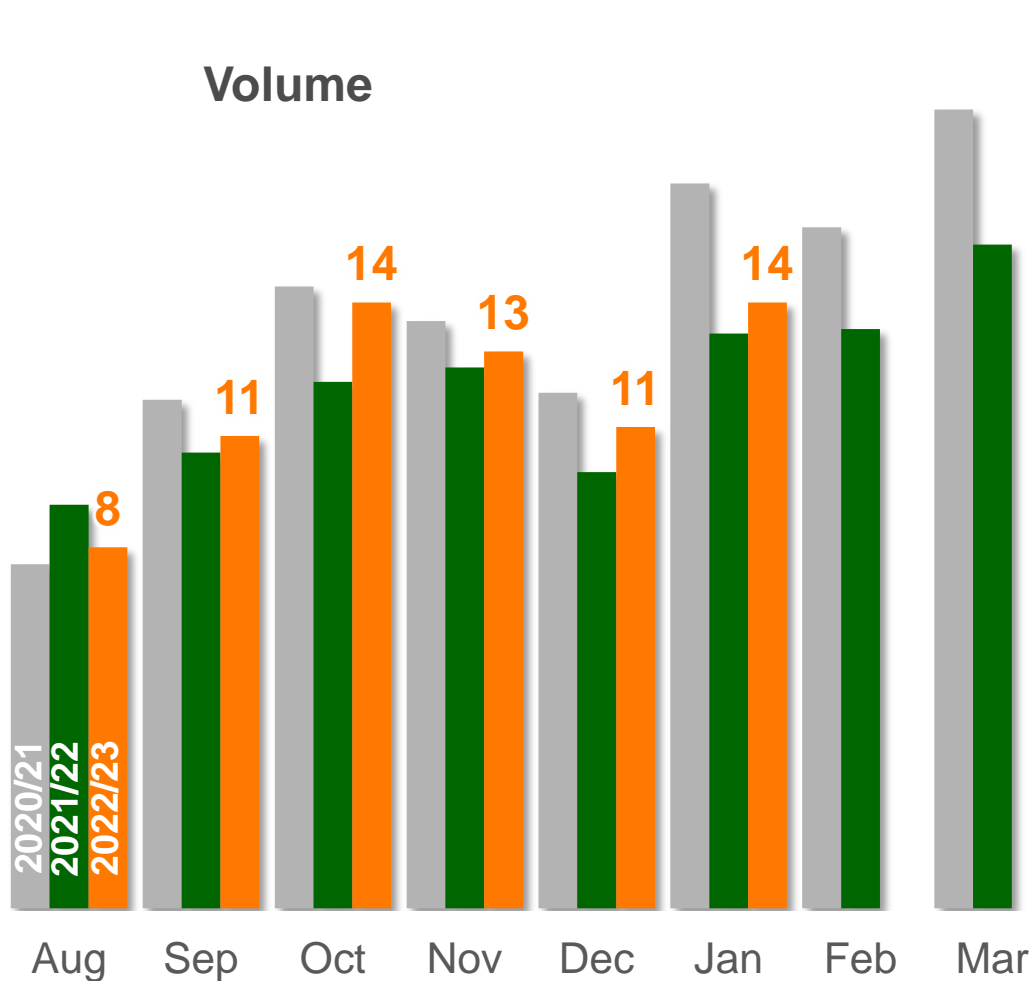


# More sales than 2021/22

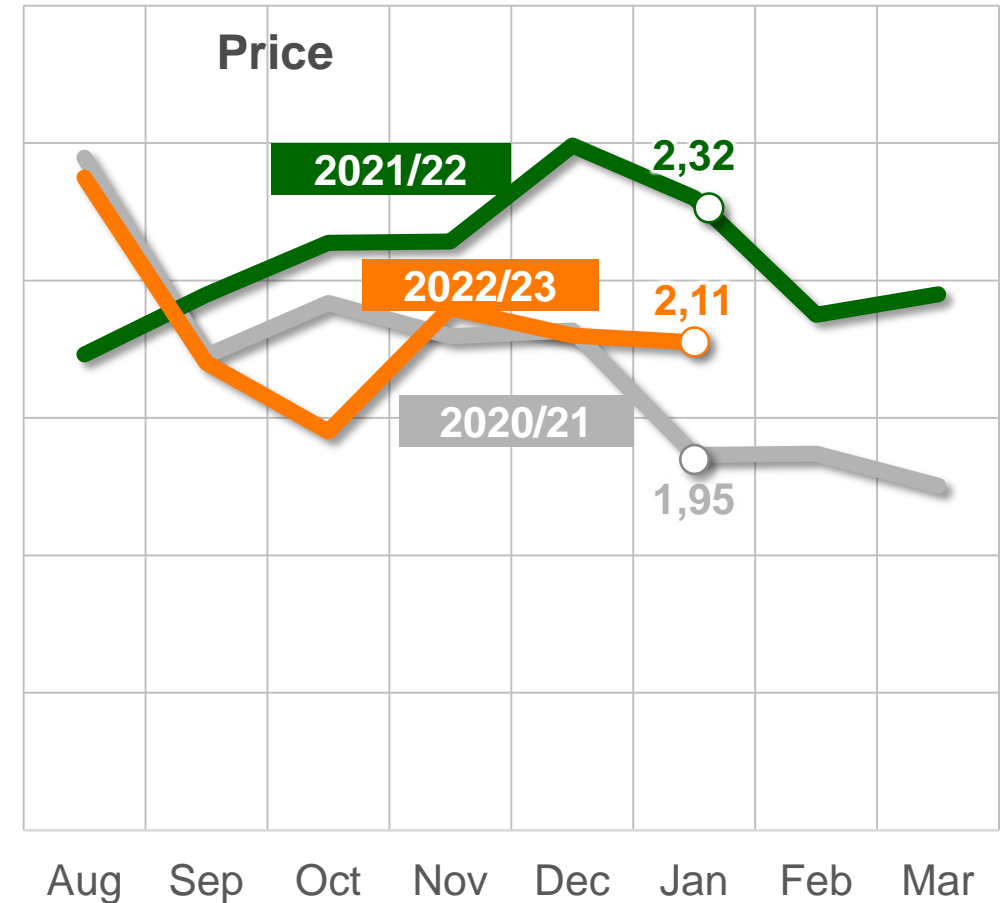
Monthly pear buying volume German household and retail price, in 1.000 t and EUR/kg



Volume



Price

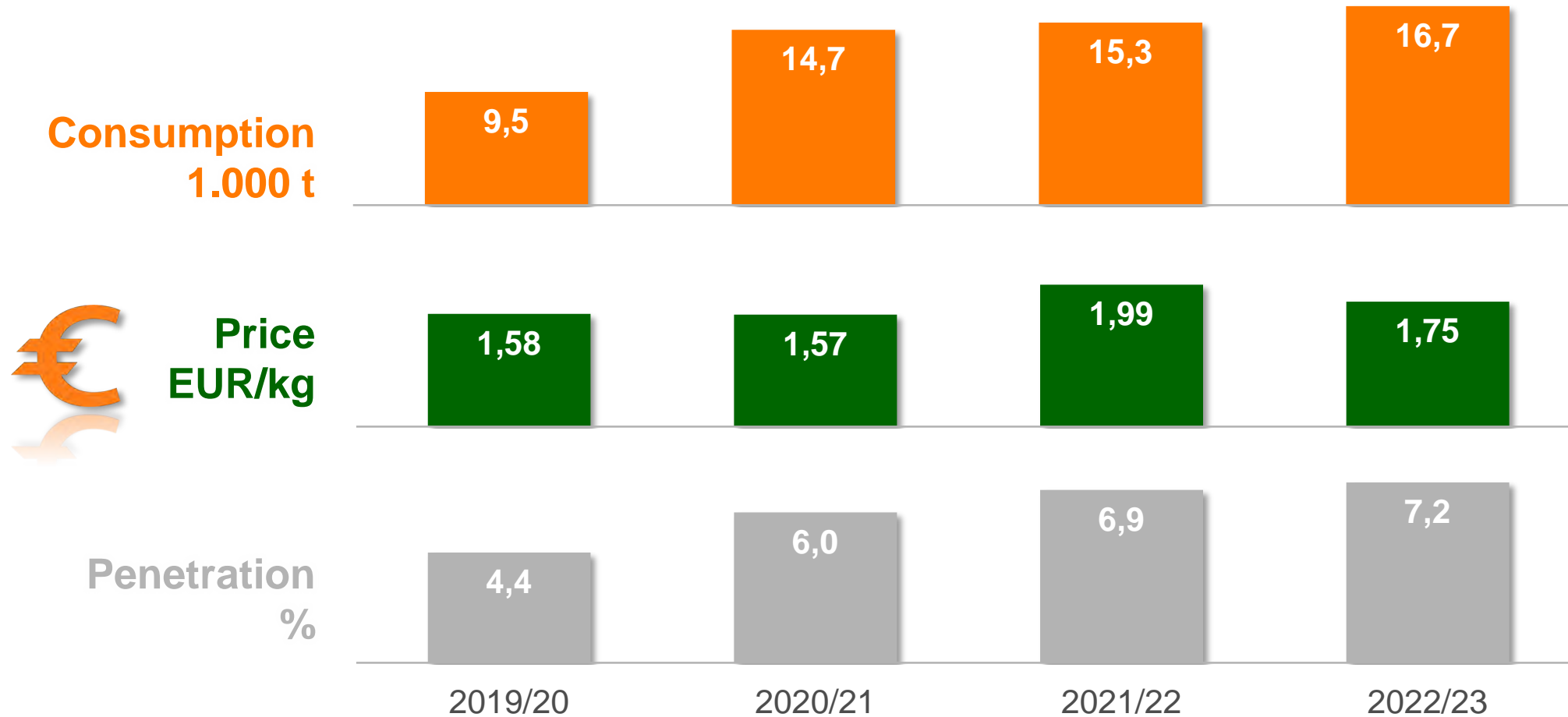




# Conference wins

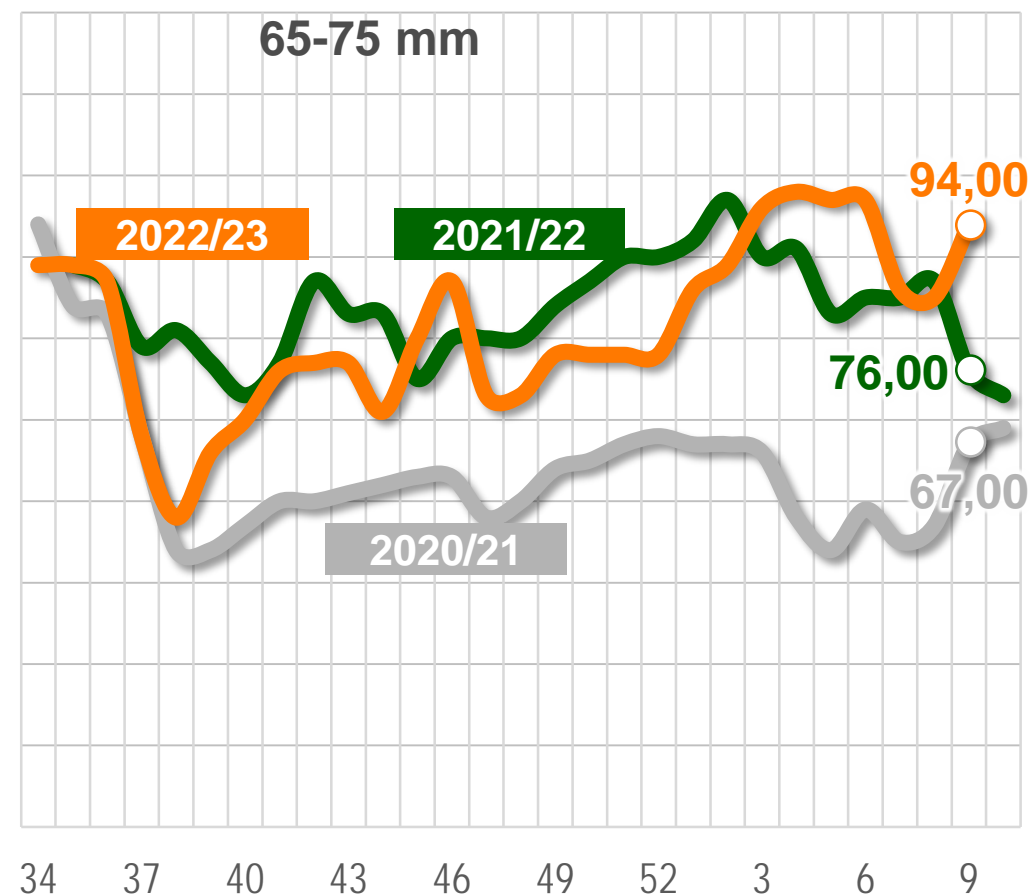
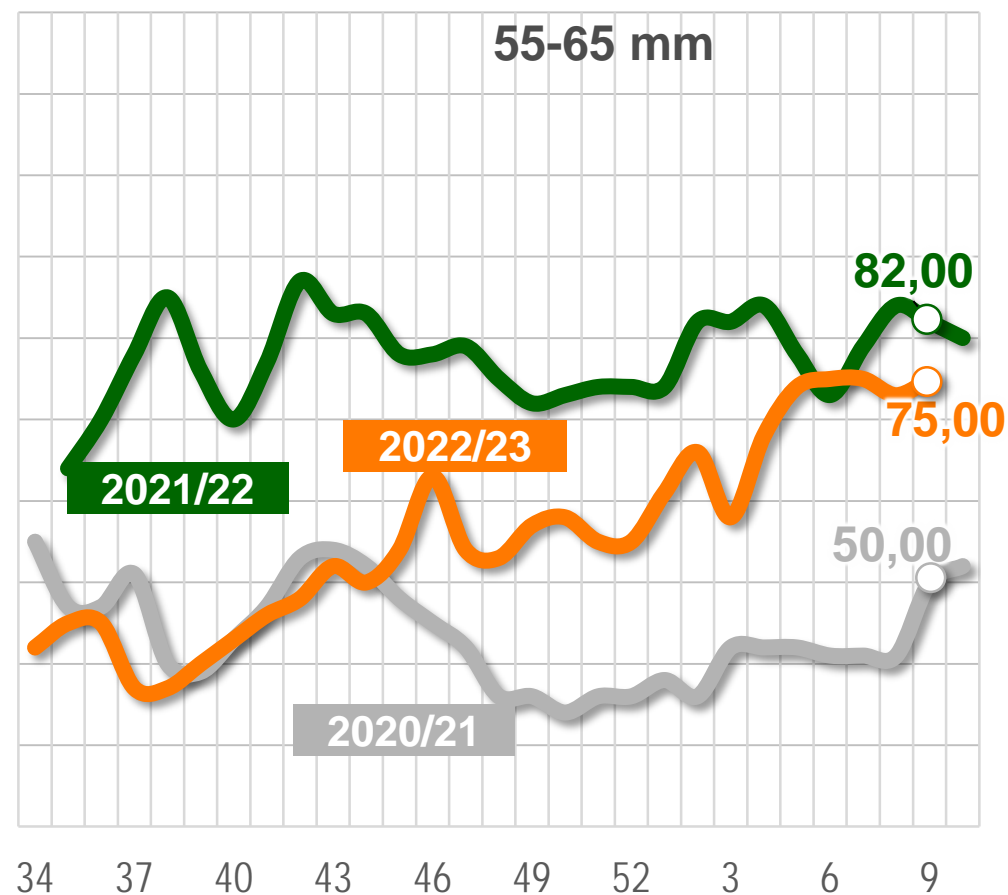
AMI

Behaviour of consumption in Germany for Conference, September to December



# Increasing prices

Auction prices per week for Belgian Conference, Class I in EUR/100 kg



# Thanks a lot for your attention.

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