THE FRUITS AND VEGETABLES INDUSTRY SERIES

14 September 2021

Session N°1

Market trends and prospects of a dynamic sector

COLEACP

INTERNATIONAL YEAR OF
FRUITS AND VEGETABLES
2021

OECD

FRUIT AND VEGETABLES SCHEME

Fédération du Commerce et de la Distribution

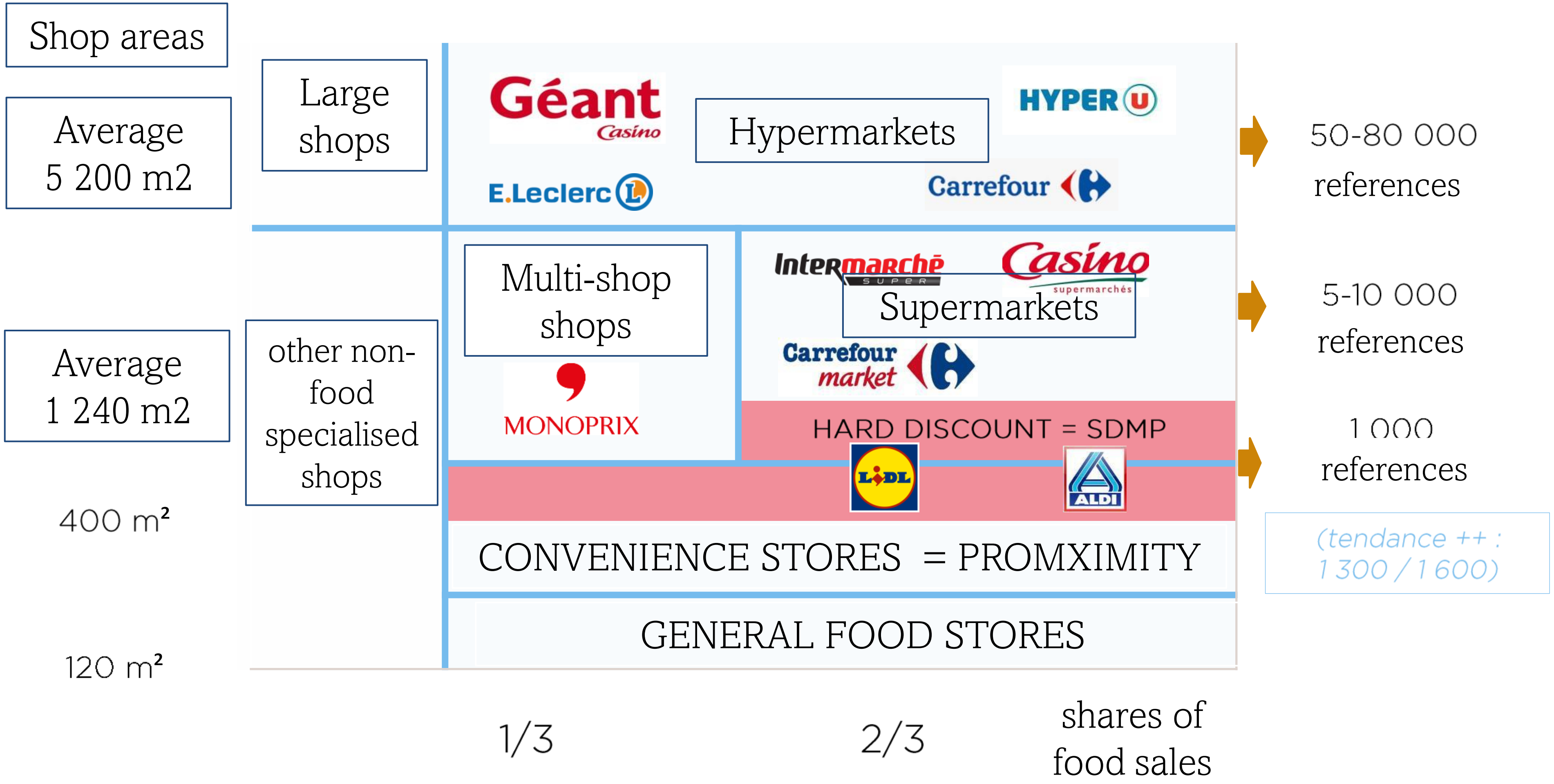
Fruit and vegetables in super- and hypermarkets

Jeff Mahintach U-Enseigne

Septembre 2021

The typology of non-specialised shops according to INSEE

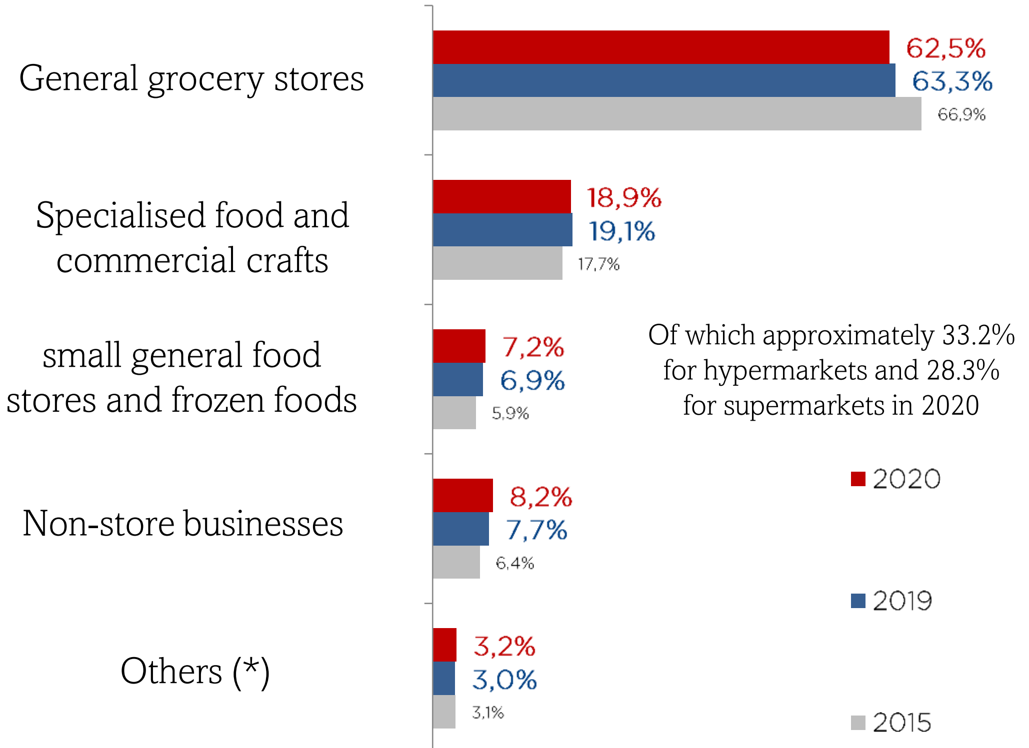
Food retail in France



The weight of the food retail trade

Non-specialised food retail:
70% of the food market in 2020 (home consumption)

Market shares - food products excluding tobacco (%)



(*) Retail sales by wholesalers, various service providers and direct sales by producers / pharmacies

Source: INSEE, Le commerce en 2020

Source: INSEE: "Base permanente des équipements: commerce" 2019, based on 35,293 municipalities in mainland France

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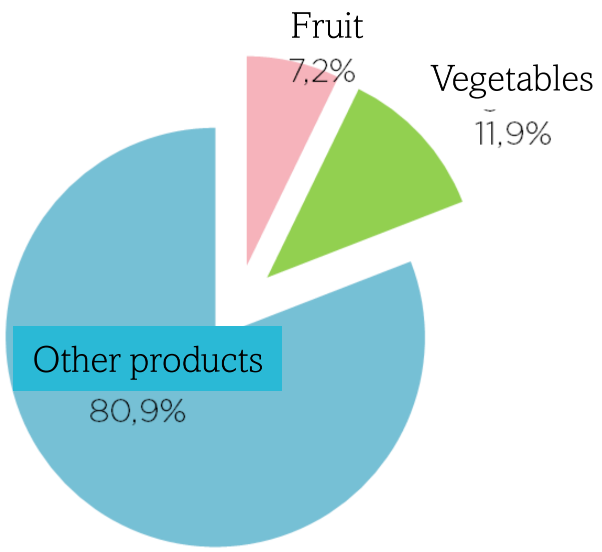
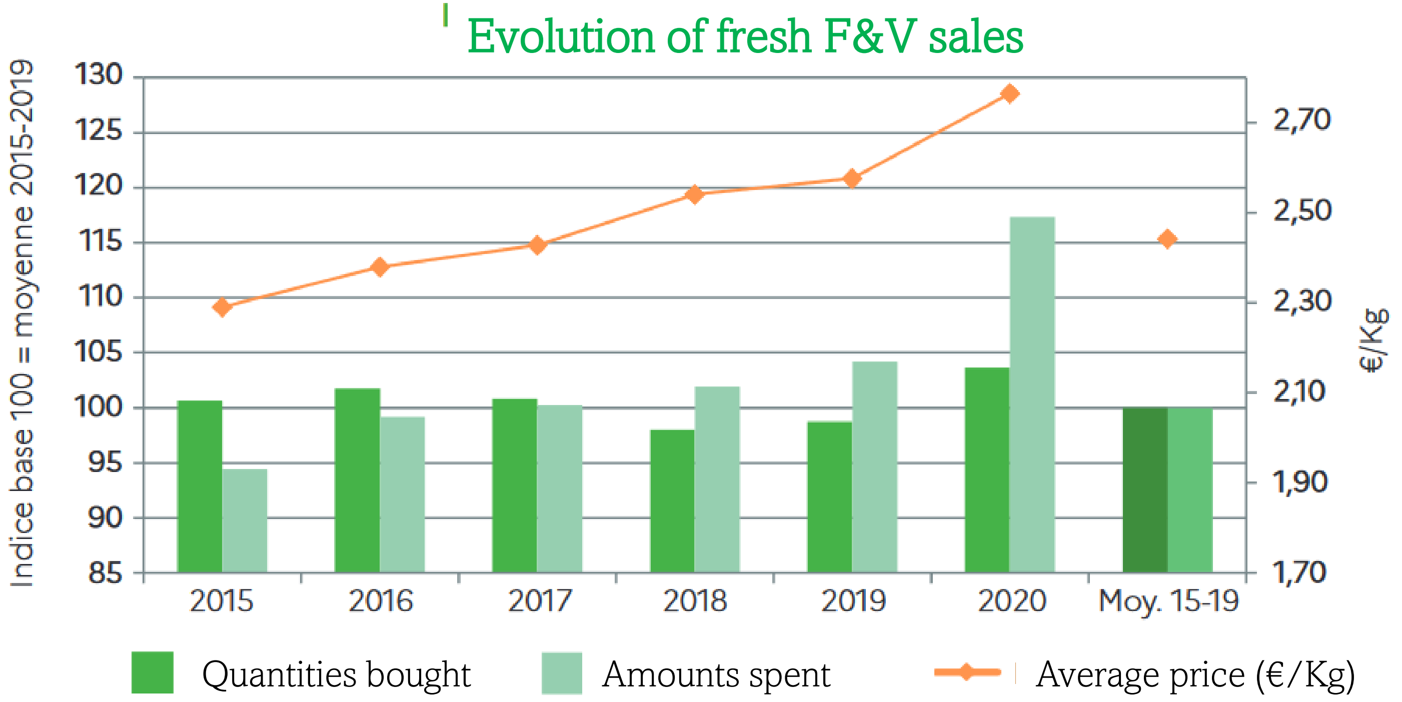
Fruit and vegetable consumption in France

According to Kantar data for FranceAgriMer, the quantities purchased in 2020 increased compared to 2019 (+4.9%), driven by the increase in quantities purchased per act (+6.4%). The amounts spent, which show the most spectacular development (+12.6%), are boosted by a strong increase in the average purchase price (+7.3%).

Segmentation of household food consumption
(% of expenditure in 2020, consumption at home)

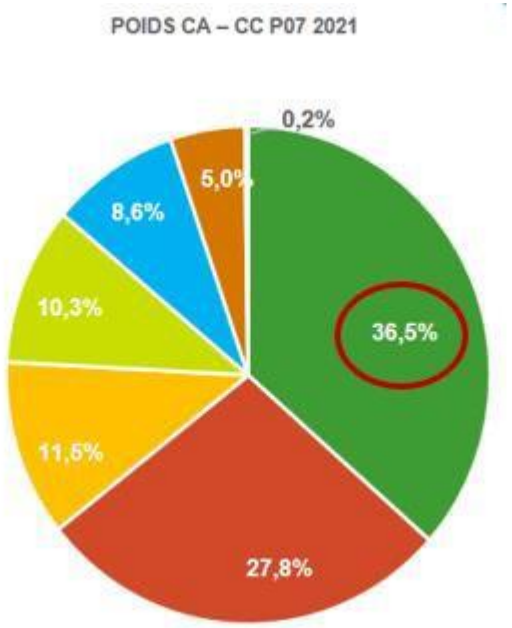




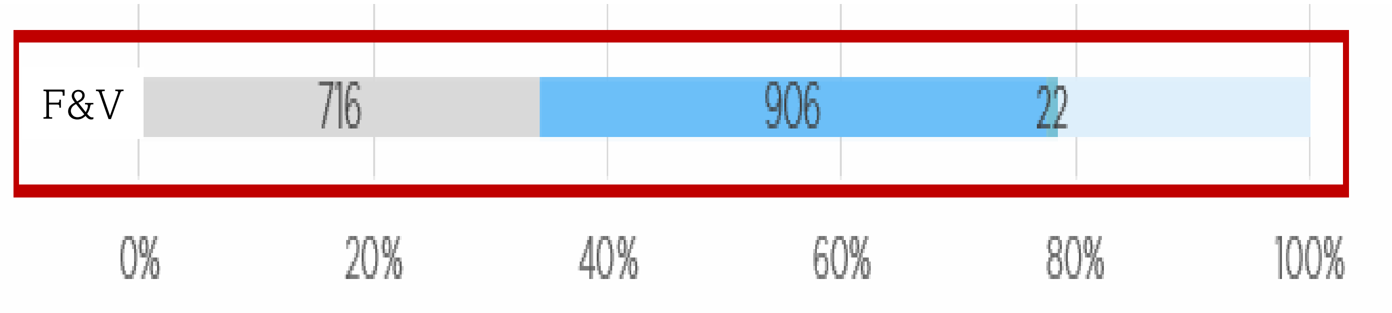
Fédération du Commerce et de la Distribution

Fruit and vegetables in hyper- and supermarkets

Fresh fruit and vegetables account for 36.5% of "varying weight" sales in supermarkets and hypermarkets, i.e. just under 7% of total sales in supermarkets and hypermarkets (food + non-food). The 4% drop in 2021 should not overshadow an increase of more than 6% compared to 2019 (before COVID-19).



The general food trade accounts for 34% of organic fruit and vegetable sales by value in 2020 (37% of fruit and 31% of vegetables). It is the second distribution channel after specialised organic distribution (43%, of which 53% for fruit and 41% for vegetables).



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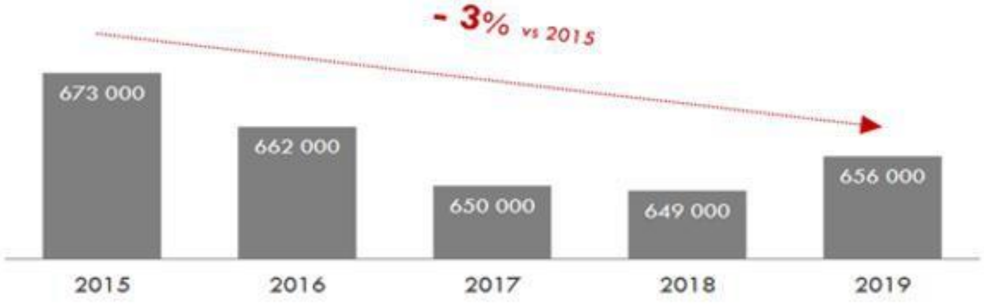
Processed fruit and vegetables
Canned and frozen vegetables

Canned vegetables are preferred at home

86%

Home consumed

Less consumed by households and restaurants in recent years

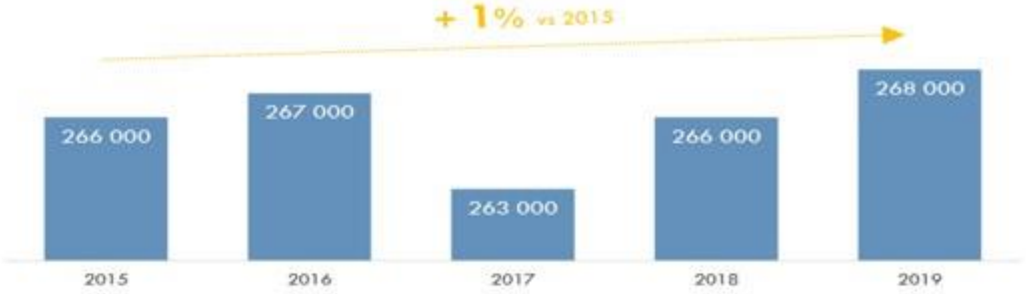


Frozen vegetables are consumed both at home and by restaurants

51%

Home consumed

Relatively stable consumption in recent years



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Consumers' expectations

Local products, France origin, environmental friendly products …

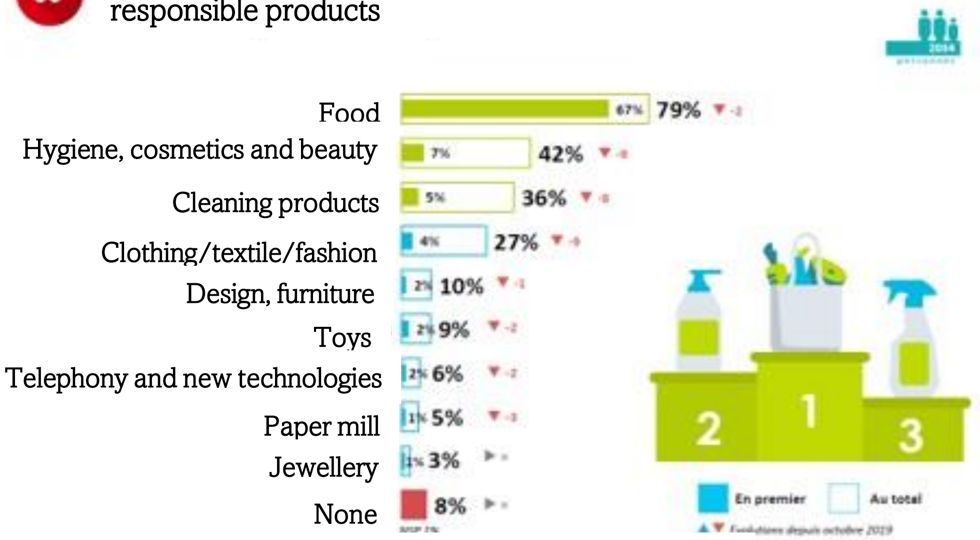
French people's expectations in terms of quality and value are also reflected in their consumption: since the beginning of the 2010s, the trend towards "less but better" has gradually become established in their purchases.

“ In general, the crisis has led the French to think about their consumption.

For 73% of the French, the crisis has made them want to consume (more) responsibly

Source : Baromètre Max Havelaar – Opinionway – Octobre 2020

“ Food remains in the preferred sectors for the purchase of responsible products



French origin and local

79%* Try to buy local products as often as possible (79% in 2019)

LinkQ COVID-19 : terrain AVRIL 2020
2019 : questionnaire Opinion

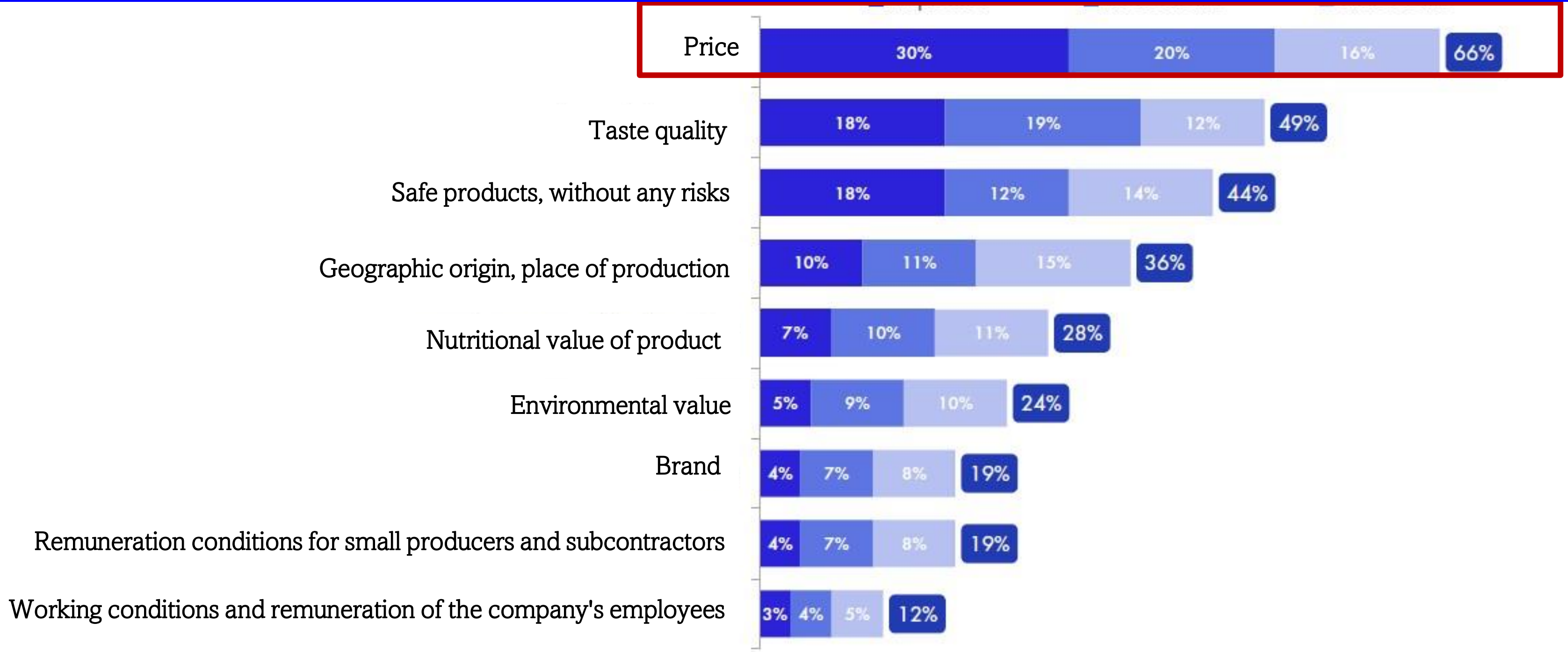
Source : Kantar

Consumers' expectations
The price !

Importance given to the commitment of companies

Price is by far the most important criterion for choosing food products. The environmental impact is 6th, far behind geographical origin.

In general, for your food purchases, please rank the three criteria that are most important in your choice of products and brands.



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@L'ObSoCo/Trusteam – Baromètre de l'engagement– Juin 2021

Fédération et de la Distribution

Tomorrow, the challenges for large and medium-sized retailers

- Maintaining the fresh F&V consumption
  - Communication devices for the promotion of F&V
  - Working with the upstream sector on product quality
- Strengthening links with the upstream sector
  - Setting up multi-year partnerships
  - Support for virtuous sectors
- Limiting our environmental impact
  - Reducing plastic packaging
  - Local sourcing
  - Reinforcement of the offer from environmentally friendly agricultural practices (organic, High Environmental Value ...)
  - Acceleration of work on agronomic research
  - Educational actions for consumers to ensure a better match between customer behaviour and societal expectations

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Thank you

This series of events is organised by the OECD Fruit and Vegetables Scheme and COLEACP.
COLEACP operates within the framework of development cooperation between the Organisation of African, Caribbean and Pacific States (OACPS) and the European Union (European Development Fund – EDF), with the support of the French Development Agency (AFD).