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Capitalizing on trends to tempt the consumer

Info

Fruit consumption: some figures
A database containing comparable figures is required to make comparisons between countries. An examination of the World Food Organisation's (FAO) figures clearly shows that Greece and Italy consume the most fruit and that Slovakia and Poland the least. However, the FAO figures are based on the volumes of product that are available for human consumption. A comparison of these figures with those from consumer panels (in which consumers record what they really eat) shows that the actual consumption is approximately one third of the FAO figures. Therefore, quite a bit lower.

The consumption of more than 400 grams of fruit and vegetables per person per day as recommended by the World Health Organisation is certainly not achieved everywhere in Europe. Therefore, from the health viewpoint, but also from the viewpoint of the sector, there is still a lot to gain. To tempt consumers to buy fruit, the sector must understand and respond to the trends associated with fruit consumption. The recently concluded European Isafruit project investigated these trends in four countries.

In Greece, the Netherlands, Spain and Poland, interviews with experts were used to investigate the factors that determined fruit consumption in the past and the trends to be expected in the coming years. In Greece, fruit consumption is currently high and stable, in Spain high and rising, in the Netherlands average and stable, and in Poland low. Ten (Greece) or twelve (the Netherlands, Spain and Poland) experts were interviewed in each country. Half of them originated from the fruit sector (internal experts), the other half from outside of the sector (external experts).

Influences up to now

In Greece, according to the external experts, health and welfare were the most important trend-determining factors in recent years, followed by convenience, demographic change, economic factors and marketing. Sustainability, product variation and quality appear to have had less influence on fruit consumption than the previously mentioned factors. However, the fruit sector experts say that quality, marketing (including modern logistics, but also the promotion of

fruit consumption in schools) and economic factors are the most important influences. They also mention health as a determining factor.

The Netherlands

In *The Netherlands*, in the past health, convenience, product innovation, availability and a lack of identity played a role. This latter factor had a negative influence on consumption. According to the external experts, many consumers do not have a fixed moment of the day at which they eat fruit, in addition, many consumers do not know how fruit is grown or how it should taste. The external experts say that this latter aspect is already changing.

Experts from the Dutch fruit sector report that the most important influences were health, product variation and food safety. Convenience was also mentioned. The internal experts describe product variation not only as a variation in type, but also as an improvement of existing types, including improved health value or more/better options for processing.

Spain

In *Spain*, in addition to health, product variation was the most important factor. This includes the availability of new fruit types, new varieties, convenience and even new ways of storing and packaging. Furthermore, quality aspects including those described as being related to food safety are mentioned several times. In Spain, the internal and external experts agree with each other.

Poland

Internal and external experts in *Poland* mention multiple factors that have played a role in the country. Negative aspects were in the main a lack of a significant rise in income, eating habits, availability (not available throughout the year) and

the changes in the distribution systems. Positive aspects were the health trend (as a lifestyle) and the increased supply of imported fruit. The Polish internal experts mention the same factors as the experts from outside of the sector. However, they add two other positive factors: the development of supermarkets and marketing activities.

Health remains important

Health, convenience, eating out, product variation and economic factors are considered to be the most important future influences by the Greek external experts. Marketing will also influence consumption. In general, both groups of experts in Greece expect there to be an increase in the number of fruit products available that have special health and quality properties, in view of the expected rise in consumption outside of the home. In addition, they think that the availability of convenience products will increase the consumption of fruit.

The Netherlands

In *the Netherlands*, the health trend will continue, according to the external experts. Health and convenience will be combined in new products. The expectation is that the communication/ marketing around the health effects will increase further. As the consumer also wants to be tempted in the future, the experts think that more new varieties and new tropical fruit types will enter the market. New, attractive and effective packaging will be developed. Finally, according to the external experts, the origin of the fruit will become increasingly important. Consumers want to experience the pure fruit flavour. In the Dutch fruit sector itself, health is

also considered to be the most important trend followed by product variation and convenience. An increasing supply is expected of fruit products with special health properties and a high guarantee of food safety and sustainability. The supply of fruit will become much more demand oriented and there will be a focus on the 'fruit experience'.

Spain

According to the internal and external experts, in *Spain* 'health and welfare' will also be the most important factor in the coming years. Quality comes second, followed by convenience and demographic and economic aspects. The internal experts indicate that the convenience factor is more important than the quality factor. In contrast to in the Netherlands, in Spain health is not only seen as 'not being sick' but also as 'looking good'. Quality and convenience are strongly related to health. If consumers eat fruit, this will have to be adapted to their needs, in a form that is easy to consume, for instance washed, peeled and cut. The experts emphasise the importance of the demographic changes, including aging and increased immigration.

Poland

In *Poland*, the expectation both within and outside of the sector is that the consumption of processed fruit (in particular jams, juices and nectars) and of organically grown fruit will increase. The Polish consumer appreciates in particular the nutritional value of fruit. Economic factors will continue to influence the consumption of (processed) fruit, but their impact will reduce as the average income rises.

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Scenarios

Based on these trends, for each country scenarios have been described and the internal experts have made recommendations for the fruit sector in order to increase fruit consumption. These show that the four countries have a lot in common, but that due to their cultural or economic differences, they also give different weight to the various factors.

Finally, there appears to be differences in the trends identified by experts from within and outside of the sector. There was a difference between the Greek and the Dutch experts with respect to the factors that determined consumption in recent years. Regarding the future trends, the external experts of all four countries see an additional factor, which is considered to be not or less important by the internal experts. In Greece, this concerns product variation, in the Netherlands the information about fruit and its origin, in Spain the demographic and economic aspects and in Poland the changes in demographic factors. These are therefore aspects that are identified by experts from outside of the sector but less so by the internal experts.

Difference between north and south

In general, it seems that the inhabitants of the southern European countries eat more fresh fruit than consumers living in the north of the continent. Although the Spanish already consumed high volumes of fruit, at the start of 2000 it rose, while in Germany and Italy it dropped in this period. In Greece, the Netherlands and Great Britain, the consumption of fruit appears to be more or less stable.

Interviews with experts

To determine the (future) trends in fruit consumption in Greece, the Netherlands, Spain and Poland, in total approximately 45 internal and external experts were interviewed. The internal experts included a director of a trading company, a manager of a fruit processing company, a grower and an auction manager. The external experts included a retail manager, a policy official of a ministry, a dietician, a marketing expert and a trend watcher.

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