



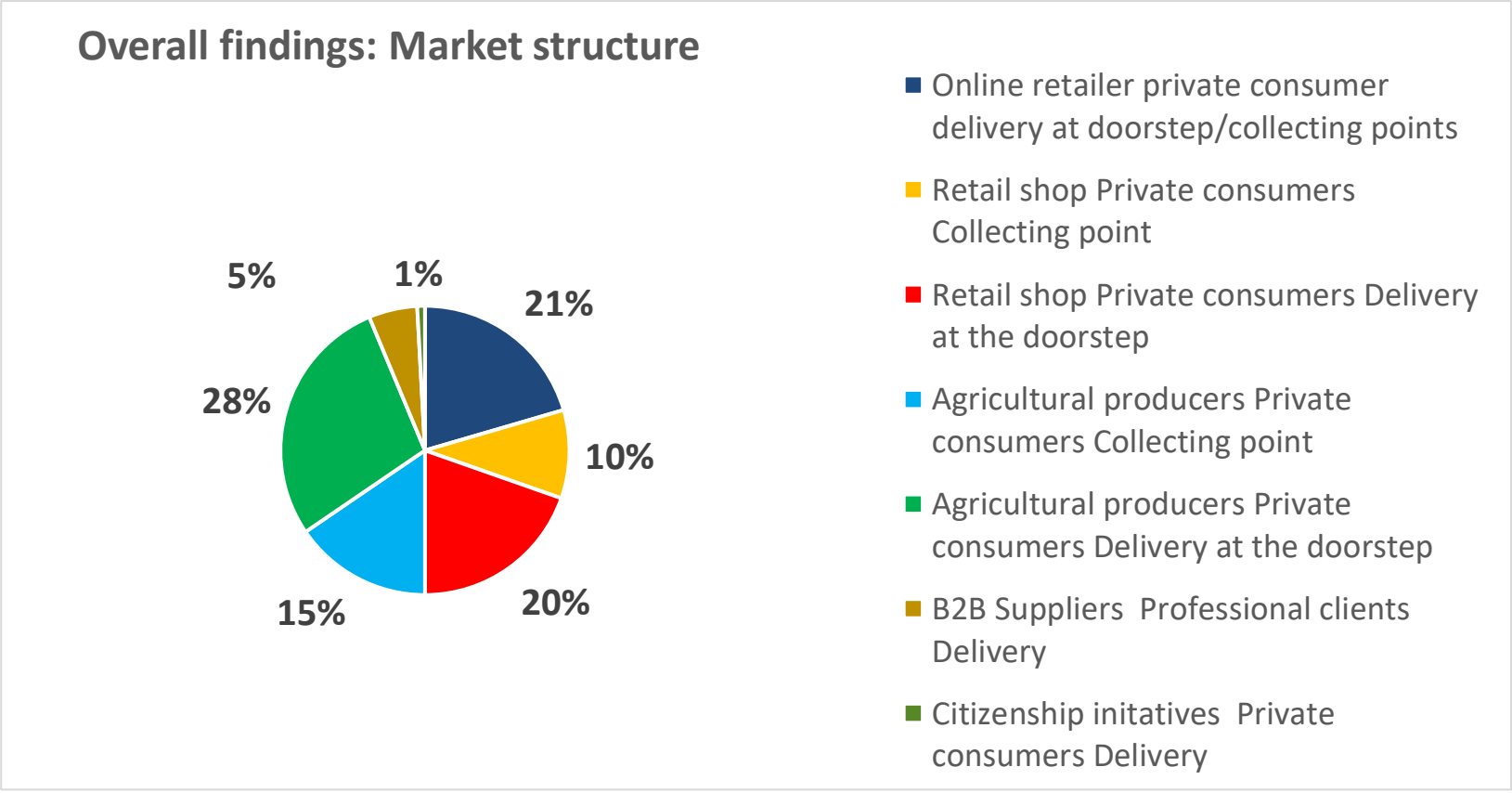
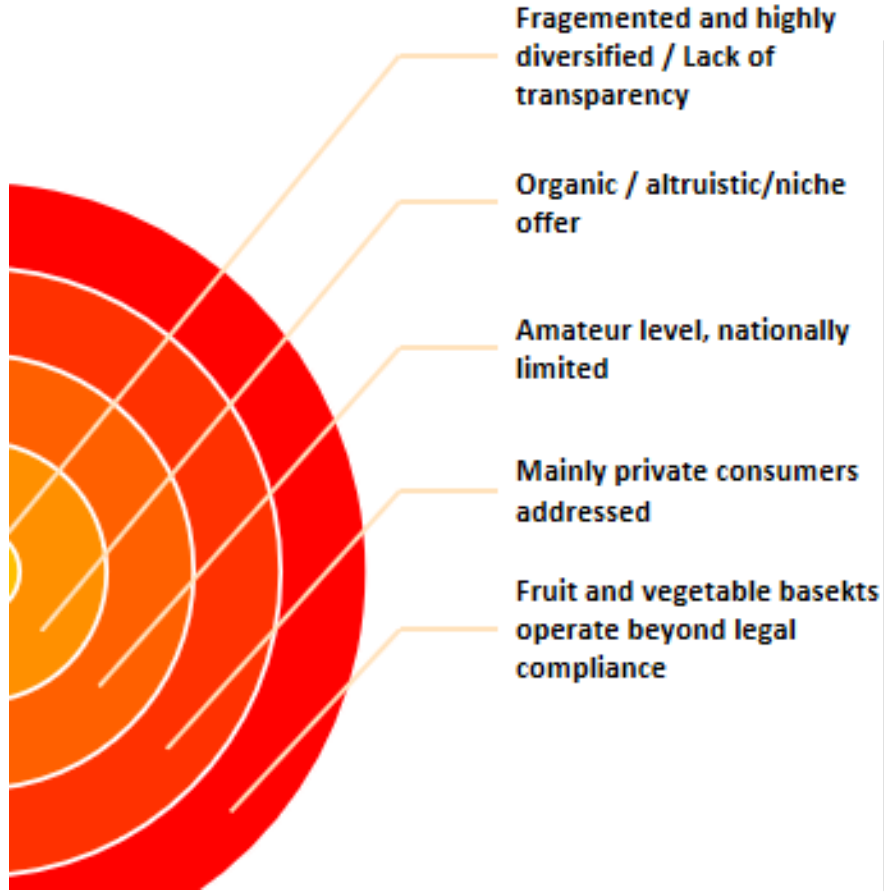
Press Kit for Release: Study results: Online sales of F&V in Europe

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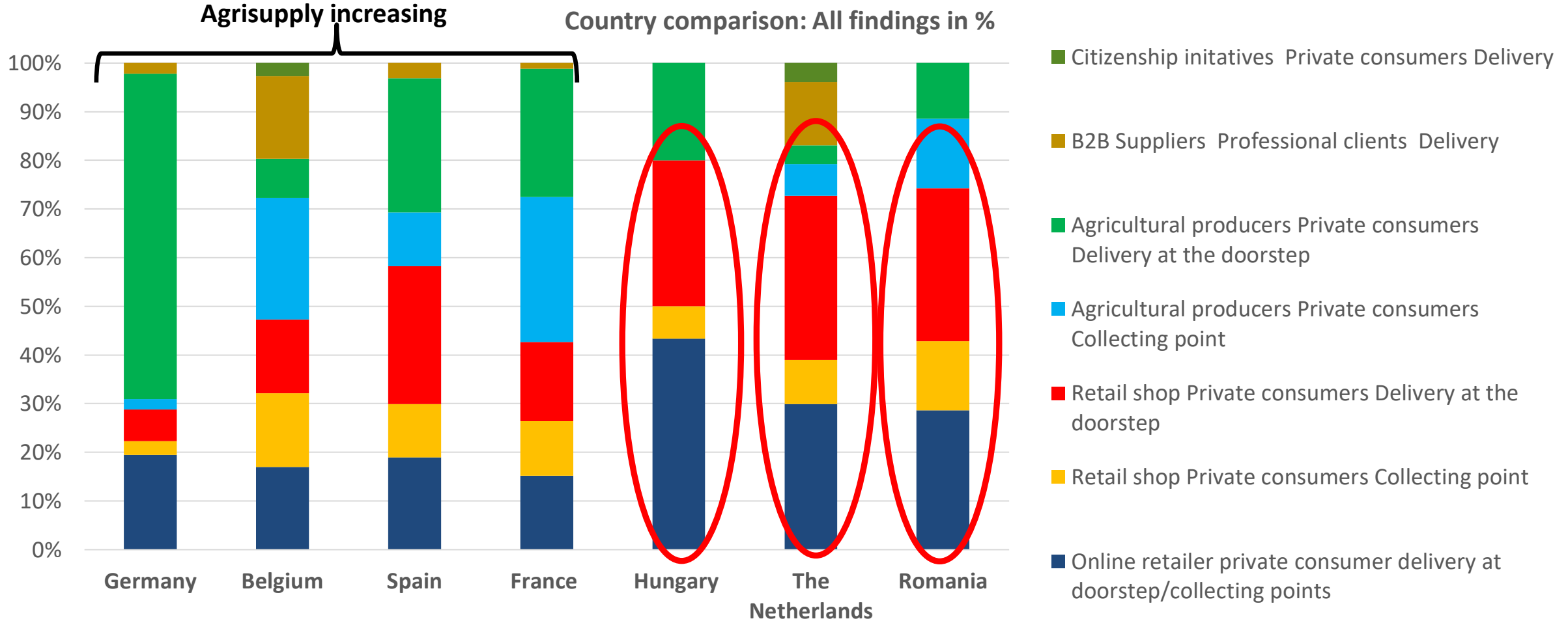
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Results of the study: General market trends

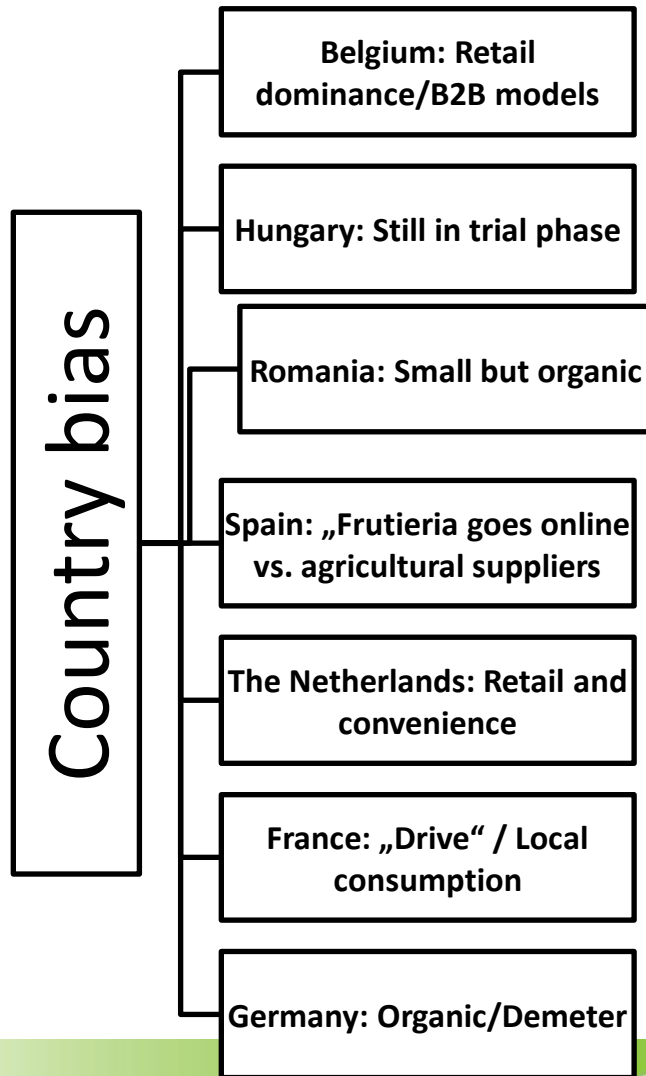
- ❖ 51 % retailers & online retailers, 43% Agricultural Suppliers !
- ❖ Western Europe vs. Central Europe market size: 96.5 vs. 29.5 average amount of online shops



Overall results: National differences shape the business reality



Overall results: National differences shape the business reality

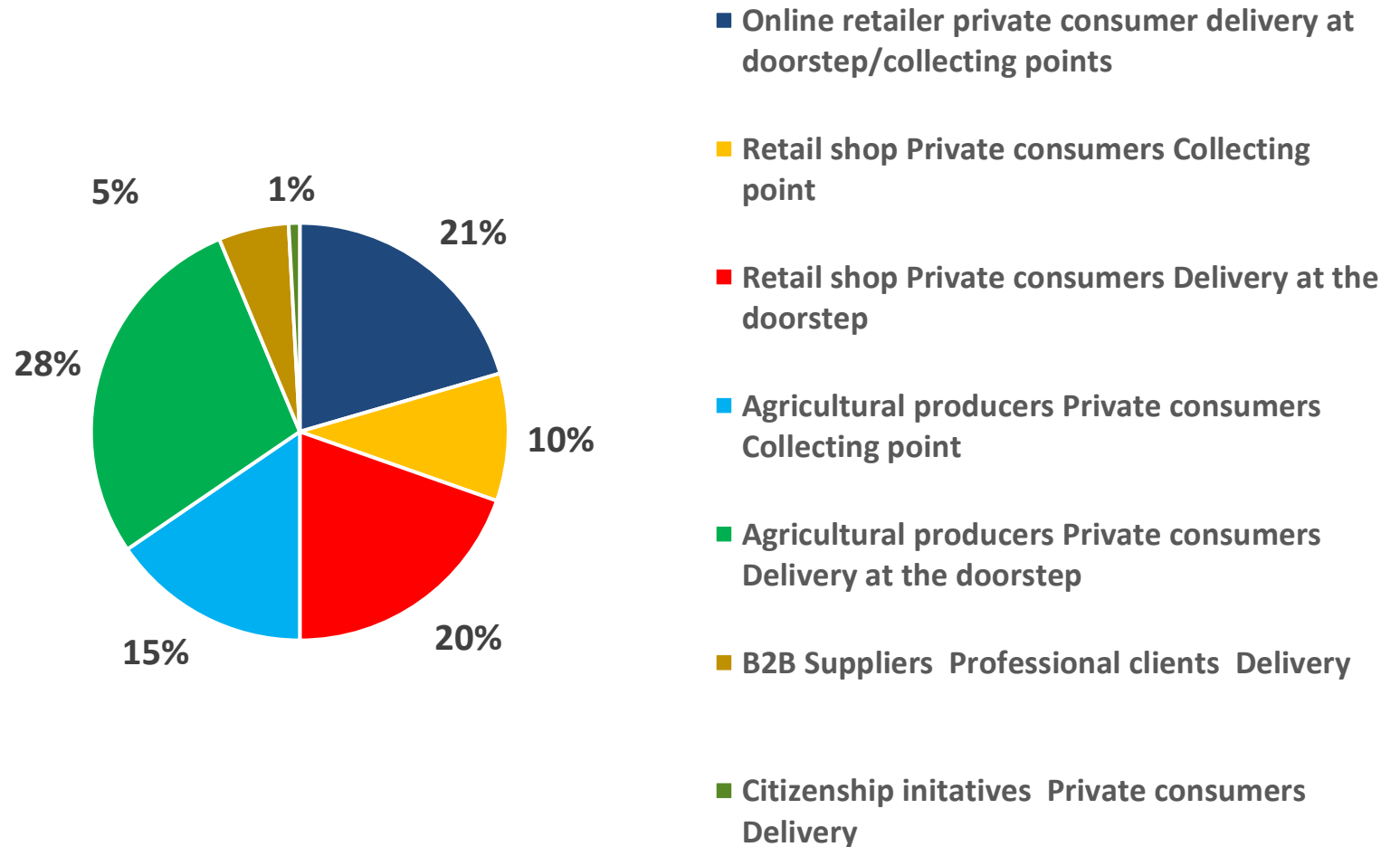


EU overall market structure pre-Covid

Market Structure: Overall results

- ✓ Half of the market dominated by online pure players and retailers
- ✓ 43 % agricultural suppliers
- ✓ 5% B2B
- ✓ Phenomena of „citizenship“ initiatives
- ✓ Western Europe vs. Central Europe (Average 96.5 vs. 29.5)

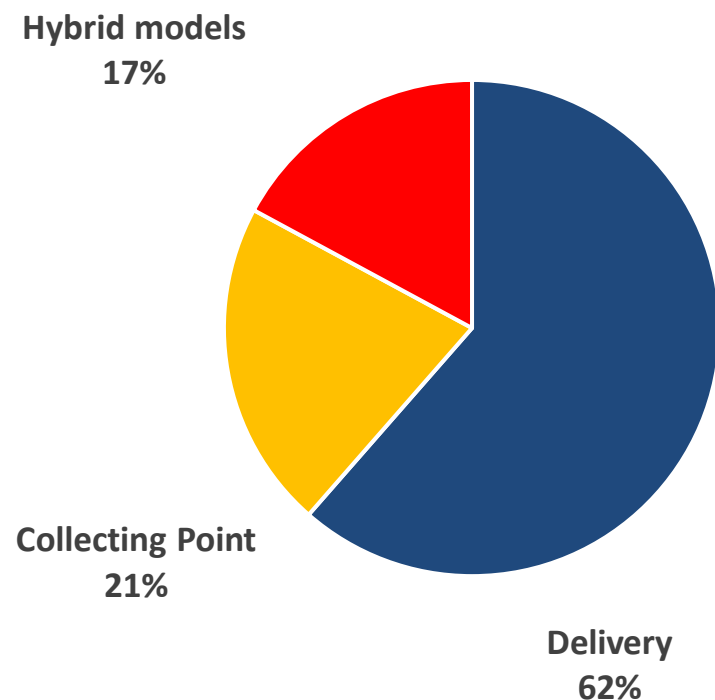
Overall findings: Market structure



Delivery models: Pre-Covid

Delivery structure findings

- ✓ Bias towards classical „delivery to doorstep“ models
- ✓ Hybrid and collecting point models rank lower in Google searches
- ✓ Collecting points / „Drive“- models: relevant for Romania, Belgium and France
- ✓ Delivery to doorstep: Main method in Germany, Spain, Hungary, The Netherlands
- ✓ Most hybrid offers: Spain, France, Belgium & The Netherlands



Compliance with Art. 6 of Marketing Standard Regulation 543/2011 – Accessibility of information

Accessibility of the information

- ✓ Checked at the example of „apple“
- ✓ Big differences among the tested countries
- ✓ Most of the times displayed right next or below the product
- ✓ Especially retailers struggled in displaying the information correctly
- ✓ Small webshops often complied better than those with a more diverse sourcing level

Country	Origin	Class	Variety	Accessibility
France	10	8	10	1.2
Germany	7	8	7	1.8
Romania	7	2	6	1.8
Hungary	5	2	7	1.9
The Netherlands	7	1	8	1.9
Spain	4	1	7	2
Belgium	3	0	5	2,6