2024

Consumer Compass

Dole

Consumer Compass 2024

A report on why we eat (and don't eat) fruit and vegetables.

Summary

Fruit and vegetables are fresher, require faster processing and are generally more delicate than most other types of food. They rely on a quick turnover to make sure they retain their freshness and do not get overripe, or too ripe to be sold in stores. With its low margins and commodity trading, it is understandable that the fresh produce industry has traditionally been characterised by a focus on logistics, low price and volume.

Yet ultimately, everything that is sold is for someone to eat. An in-depth understanding of the driving forces and barriers that affect the consumption of fruit, vegetables and berries is therefore essential. After all, it is easy to mistakenly assume that the person who grows or sells fruits and vegetables has the same view of and knowledge about, for example, the environment and sustainability, storage and handling, flavour and cooking as the consumer who is going to buy and eat them. Of course that is not the case. It is often hard to put yourself in someone's shoes and understand their situation and motivations.

Many adults once believed that young people who grew up as "digital natives" would be good at searching for things online — because that Internet searching was what the adults themselves did. But instead the young people got good at hanging out on platforms like Discord[1], finding Balenciaga[2] and taking selfies and photos of food on their mobile phones.

In this report, we continue to delve deeper into understanding consumers and their relationship with fruit and vegetables from their own context and perspective.

We cover 12 countries in Europe, involving experts and secondary research, workshops and a major quantitative study among 12.000 consumers. Because we think it's just like Henry Ford says: "If there is any great secret of success in life, it lies in the ability to put yourself in the other person's place and to see things from his point of view-as well as your own."

2023 was a turbulent year for the world, with wars, high inflation and rising interest rates. The pandemic had recently subsided, but there was no smooth return to a comfortable existence for consumers. In fact, the sense of uncertainty and complexity has arguably heightened further. 2023 also saw a lot of focus on technology, especially AI, and the global tech giants, not least those from the US and China, which are playing an increasingly significant role in society and consumers' lives.

In the midst of all this turmoil, it is easy to forget that humans are still biological beings – people with needs and dreams. And to feel good, people need to eat, for example. They need to spend time with family and friends, enjoy themselves and reflect. This is precisely what some of the key insights in this report highlight:

"If there is any great secret of success in life, it lies in the ability to put yourself in the other person's place and to see things from his point of view-as well as your own."

- Henry Ford

TAKING COCOONING TO THE NEXT LEVEL

Consumers have not mentally recovered from the pandemic. A long-term trend towards more single households and increased individualism has left consumers ill-prepared for the uncertain and complex world we live in. The pandemic played a part in weakening interpersonal relationships that were already in a vulnerable state.

One of the most talked-about consumer trends of the 1990s – cocooning – seems to have been taken to a whole new level. More and more people are hanging out with their screens rather than with other people in real life. Many of them eat their meals alone, reinforcing their cocoon lifestyle even further. Only 47% see their lives as meaningful, while just 37% consider their lives interesting.

Ever since there have been humans on Earth, eating together has been the most common way for people to build relationships, trust and meaning in their lives. The fresh produce industry has the potential to do society and consumers of the world good by understanding and reinforcing the contexts that encourage them to meet and socialise together over food.

OUR BRAINS ARE FULL, BUT OUR HANDS ARE FREE

Convenience has been one of the strongest trends in consumption and commerce for decades. One aspect that is perhaps underestimated is mental convenience. Consumers are more preoccupied mentally than they are with their hands and feet. For example, we are hearing more and more talk about people lacking energy and what we should do, or not do, to boost our energy levels. But rather than not doing things, maybe it would be better to stop thinking too much instead. For instance, consumers might consider making a fancy meal if everything is arranged, all the ingredients are to hand and the recipe or YouTube video is easy to follow, or if it's something they have made before. Establishing habits and building on old ones is becoming increasingly important, and so too are solutions that reduce the need for consumers to waste energy on thinking. Displaying lime and coriander side by side in a supermarket makes things easier for them, for example.

LUNCHING IN LOUNGEWEAR

Only around half – 51% – of all lunches consumers eat contain fruit or vegetables. That is problematic if minimum fresh fruit and vegetable consumption recommendations are to be achieved. Clearly, for the fresh produce sector, there is a significant market opportunity here. Many people already have some idea of what makes a good breakfast and a good dinner. These days, however, lunch is often left to sort itself out depending on the circumstances. And it is surprising how often consumers have their lunch at home: two thirds of midday meals are eaten at home on average. It seems that video calls are not the only thing people like to attend in "goblin mode", wearing their laziest loungewear in the comfort of their home surroundings.[3]

Lunches at home have lost their structure and are usually rather hastily put together – you take what you can get – without cooking from scratch. Effort needs to be applied to encourage consumers to eat and cook a good midday meal at home. Prepping ahead, lunch boxes and leftovers from the day before are becoming increasingly important when people's circumstances are a little more fluid and less socially oriented, as is often the case when they are lunching at home.

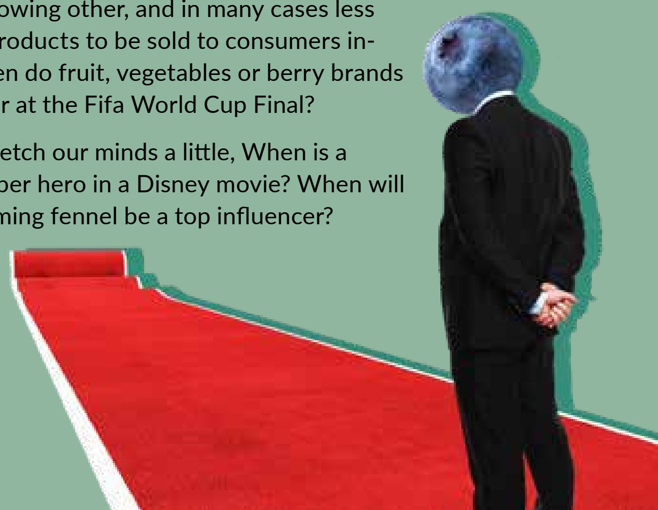
WHERE ARE THE WORLD CUP VEGETABLES?

Consumers' brand awareness when it comes to fruit and vegetables is too low. In all 12 of the countries we surveyed, fewer than 40% of people can name a single fruit or vegetable brand.

All consumer industries have an offer in the form of a product or service, but they also drive demand through brands and marketing. It is clear Nestlé or Coca-Cola would never have sold as much food and drink as they have without the marketing and branding to back it up. Operating off a lower margin than FMCG peers, fruit and vegetables are sold on an equally large scale, but without the same brand focus and marketing expenditure and intensity.

There is clearly an incentive for, players in the fresh produce industry to invest more in the area of marketing and branding. Otherwise, companies risk missing out on exploiting the potential to increase consumption and risk allowing other, and in many cases less virtuous, products to be sold to consumers instead. When do fruit, vegetables or berry brands ever appear at the Fifa World Cup Final?

Or, if we stetch our minds a little, When is a peach a super hero in a Disney movie? When will a livestreaming fennel be a top influencer?



THE MANY DIFFERENT FACES OF CONSUMERS

No two consumers are the same. They like different things, have different view on sport, music and politics – and on food. Circumstances have a part to play too. No one always buys expensive things, or always cheap, always convenient or always durable. Consumers are all different and do things differently in different situations.

The largest consumer group in the survey prioritizes economy, but convenience and health come close behind. Sustainability is important, too, but only one of many aspects for consumers. One consumer group that has been talked about a lot in recent decades is known as LOHAS – Lifestyles of Health and Sustainability. In this survey, it turns out that the link between health and sustainability is rather tenuous. In other words, those who care about sustainability often care about health too, but those who care about health tend to care more about finances, convenience, fun and taste than about sustainability. Although fruit and vegetables are undoubtedly sustainable and healthy, the industry needs to broaden their appeal, making them attractive to a wider range of consumers than just those who care about either health or sustainability or both.

When Greta Thunberg was named Person of the Year by Time Magazine, many people thought this meant that all young people were now part of a "Generation Greta". But with Taylor Swift claiming this title in 2023, we need to consider what other audiences are out there too. We need to know what appeals to Beliebers and Swifties, those who shop on Temu and Shein, binge-watch and spend their time on YouTube, Discord or TikTok, etc. And, of course, we need to understand consumer groups of all ages.

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About Dole plc

Dole plc is the global market leader, and the product of the combination of, two complementary, synergistic and culturally aligned industry leaders each with more than 150 years of history in the fresh produce sector.

Our vision is to make the world a healthier place – to get there, it is crucial to understand the end consumer. What are the drivers and barriers behind the consumption of fruit and vegetables? What makes people crave for our products? How do we reach out to those who are sceptical? How do we engage those who have not yet discovered the joy and feast of flavours associated with adding more fresh produce to their plates?

Local at heart, global by nature, we are structured to optimise focus and direct resources towards key products and categories and customise services for local customers and markets. In that spirit, our Northern European business unit conducted this report – the Consumer Compass 2024, in cooperation with Kairos Future, an international consulting and research company which helps companies and organizations to understand and shape their future.

Introduction

Despite the TikTok trends, all the reports about climate change, the messages about the health benefits of eating more from the plant world, not much is happening when it comes to consumption of fruit, vegetables and berries. We still need to eat more. Or as one interviewee put it: "Why is there so much talk about vegetables but you see so little about consumption?" Or "We've never had so many recipes available, or so many cooking shows, so why are we eating worse and worse?"

Almost all successful consumer sales are based on understanding the consumer and the context around them. What situation do consumers find themselves in when they are purchasing and consuming goods or services? What are the consumers' attitudes, values, behaviour, social context and mental state?

Context is everything

To understand consumers, we have investigated them in various ways, primarily by means of a large-scale survey but also through interviews and other research. The people whose work takes them closest to consumers are anthropologists and ethnologists. Traditionally, they would go and live with a family in another country, often in poor circumstances, to learn about their culture in depth. In recent decades, various approaches based on anthropology and ethnography have become more widespread and have even been used for commercial purposes.

When we interviewed Siamack Salari, who has spent decades working with anthropological methods such as observation, one quote in particular really struck a chord: "Context is everything". Selling to consumers requires an understanding of context. Salari gives two examples of this. A leading tea company wanted to test a new flavour of tea. To better understand how to make the very best tea, the company looked into how long consumers left the tea bag in the hot water and how much milk they added. The idea was to scientifically pinpoint the right brewing time for optimising the flavour. In actual fact, however, these consumer observations revealed a lot of other factors that played a significant role in this too. Some people took the tea bag out when their toast popped out of the toaster, for example. The amount of milk poured into the tea was influenced by how much was left in the bottle and how many other people would need milk for their tea too, or whether it was needed for something else later on. The taste of the new tea was not the main factor in deciding how much milk to add. The context was more important.

In another example, a major food producer was investigating how families ate fromage frais for breakfast. One of the insights gained from this was that parents like to see their children happy and enjoying themselves. The company therefore adapted their TV commercials, switching from showing happy families eating its products to filming the shots from the same angle as the parents looking at their children. This ensured that parents would see what they appreciated most – an image of how happy and curious their children would be as they consumed the company's products. This could very well be a good way to get parents to buy more fruits and vegetables too. Just imagine a child having a wonderful time making their own fruit salad with Nutella, or making their own homemade pizza topped with tomatoes, mozzarella, mushrooms and kale.

In producer-driven consumer categories, the industry often exaggerates the factors over which it has an influence. In a study of urban families' eating habits, carried out using techniques such as video ethnography and in-depth interviews at the families' home, we found that the industry spent a lot of time thinking about whether food was processed or not. Processed food was considered difficult to compete with – it may not be as good, but it is convenient to eat. Yet from the consumer's point of view, processed doesn't necessarily always mean convenience – cherry tomatoes have been proven to be significantly easier to consume than semi-processed products like canned tomatoes or fully processed ones like ketchup. Consumers didn't obsess as much as the industry over whether products were processed or not.

A recipe for success – mango, avocado and cherry tomatoes

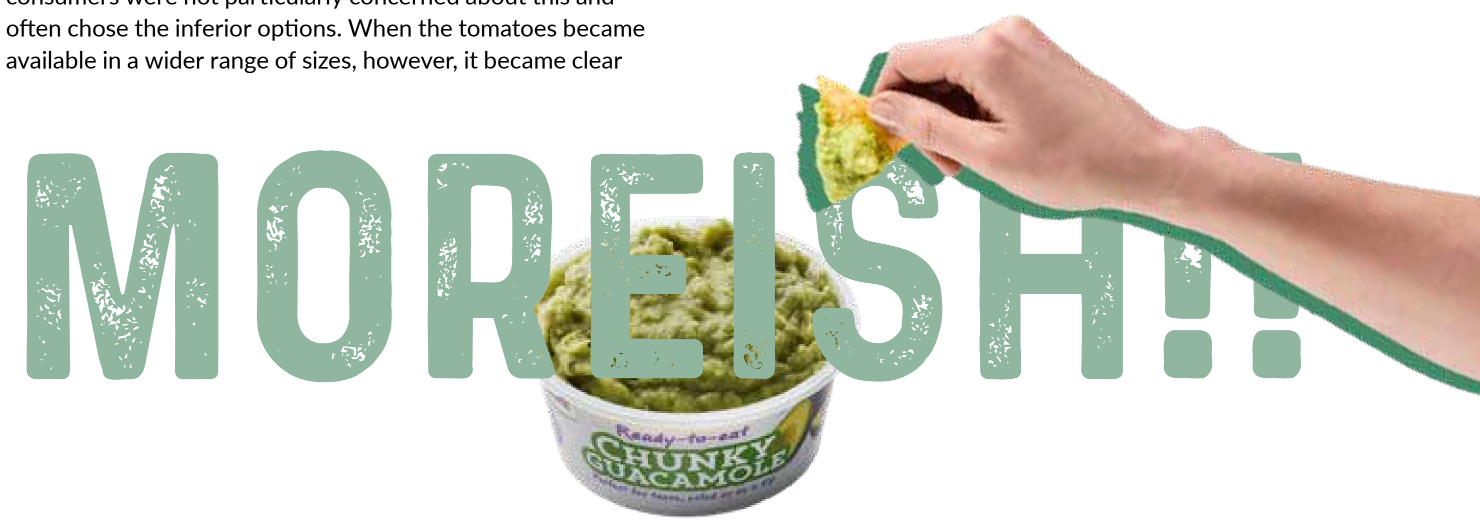
A crucial factor in learning and improving is, of course, to reflect on what has been tried and worked. What has been successful?

In terms of products that have done well in recent years, we could highlight, for example, mangoes, avocados, cherry tomatoes, blueberries and seedless grapes. One important reason why avocados and mangoes have been so successful is that the industry has got better at managing the ripening process – so there are more edible ripe avocados and mangoes available in stores. In the case of avocados, you can also find ready-to-eat ones, which are packaged to ensure that they can be eaten ripe without spoiling. While previously there was too much focus on weight, volume and price, producers have now realised that consumers want to eat ripe and tastier avocados and mangoes. Processed varieties such as guacamole also do well in some markets. Mike Knowles from the media company Fruitnet calls this ”a triumph of the intermediary”. We have managed to ensure that the quality of fruit and vegetables is improving.

As for cherry tomatoes, fifteen years ago these were in limited supply in many European countries, especially in the north. At that time, the industry was focusing a lot on what was processed and what was not. Heavily processed food was seen as bad and unprocessed food as good. Ketchup was bad, canned tomatoes was okay, but fresh tomatoes were the best. But consumers were not particularly concerned about this and often chose the inferior options. When the tomatoes became available in a wider range of sizes, however, it became clear that small tomatoes were the most convenient choice – unlike ketchup, you could pop them straight into your mouth, without getting sticky in the process. Consumers turned out to be more interested in whether the tomatoes were easy to buy and eat than whether the supplier had processed them or not.

Blueberries and seedless grapes are two other examples of successful products that are easy to eat as they are. In the case of grapes, investing in and increasing the of seedless grapes has been crucial. One of the experts we interviewed put it like this: “the industry was late in expanding the supply of seedless grapes. Because they were more expensive, it underestimated the demand for them”. Again, the context and the convenience for the consumer were misjudged. Seedless grapes are easier to eat and demand increased despite their slightly higher price. Today, many children are not even aware that some grapes contain seeds.

Blueberries have also seeing a rise in popularity – partly because they have grown larger and are easy to pick. They are “moreish”, as one interviewee said – when you start eating them, it is difficult to resist eating more. Maybe this is something we can build on in marketing?



Trends – the talk of the town

A trend, in this context, is a development over a certain period of time. When a trend is just beginning we might call it a phenomenon. Once it is a little more established, it is referred to as a trend and then when it has been around for maybe a decade or so, it becomes a mature trend or a megatrend.

We use various methods to identify trends, including research, sales data, interviews and surveys. In addition to Google searches, now incorporating AI platforms such as now ChatGPT, there remains the traditional techniques of simply asking key stakeholders such as top chefs. We could, for example, read the book "The Noma Guide to Fermentation" by David Zilber and René Redzepi, which gives an indication of an increased interest in micro-bacteria and fermentation. But sometimes trends also occur to a certain degree everywhere, for instance on TikTok. It is highly likely that more people have made pasta with feta cheese and cherry tomatoes based on a TikTok recipe than read about fermentation according to Noma.

When we take a look at what trends other people are writing about, there is often a focus on the slightly broader trends or smaller phenomena. Trend reports relating to ingredients or drinks, or those aimed at restaurants, often cover trends towards the more exotic and niche end of the spectrum.[4] They might mention things like camel's milk, dragon fruit and honey flavoured with chilli, for example. Trends highlighted with trade in mind are often rather broader: more local produce, more low-cost options, less growth in e-commerce, for instance.

It is often interesting to discover what is driving these trends. In the case of dragon fruit, it turns out that Starbucks has launched a drink called the "Mango Dragonfruit Refresher". In other words, this trend is featured partly because a big player, in this case Starbucks, is putting its money on dragon fruit and raising its profile. As for camel's milk, it seems rather unrealistic that this would become a major trend in Europe. Nevertheless, there is a broader trend surrounding alternatives to dairy products. Coconut water, oat milk and almond milk have expanded their market and camel milk could likewise gain popularity as another alternative to dairy products based on cow's milk. Even goat's milk has received a boost. It is perhaps more relevant to talk about alternatives to dairy products rather than attaching too much importance to camel's milk in particular.

Chilli-flavoured honey is an interesting combination of two products which have both been on trend. The chilli market has grown significantly more diverse, with more varieties available in-store. Even ten years ago, major supermarket chains in the UK were selling "chilli-growing kits" for those who wanted to grow their own at home. Chilli has also become more common as a flavouring agent in different and less obvious food products, such as chocolate or ice cream. Honey is another product which has become more sought-after over time. It is seen as more natural and less processed than other sweeteners, and since bees are important for pollination and therefore our food supply, beekeeping has also seen something of a resurgence. Regardless of whether chilli-flavoured honey becomes a major commercial product, it is an example of two trendy items which have benefited from each other.

The noughties: molecular and experimental

Honey is also an example of something which many be seen as more authentic – a term which also happened to be named the word of the year by Merriam-Webster in 2023. For anyone in the food business, this may actually seem a little late. If we take a brief look back at what factors have been influential in recent decades, the early 2000s were full of experimentation and curiosity – everyone was talking about molecular gastronomy, as pioneered by the star chefs Heston Blumenthal at The Fat Duck near London (known for his snail porridge, among other delicacies) and Ferran Adrià at El Bulli. Both of these culinarians had restaurants ranked top of the list of the prestigious World's 50 Best Restaurants.

The 2010s: down-to-earth and authentic

The decade that followed was more about all things natural and local, with René Redzepi's restaurant Noma leading the way. Many chefs opted to use home-grown produce and foraging for plants and herbs in the local environment became increasingly popular. Chefs became global superstars who would teach us how to improve society and life in general. They would innovate, cook with hay, plate up edible dirt that looked like soil and serve up ants. They formed secret societies like Gelinaz! and Cook It Raw and talked not only about food but also about philosophy and their outlook on life. The ideals were still there, but the ambitions were more modest. The star chefs of today are Virgilio Martínez and Pía León at the Central restaurant in Lima.[5] They work with local ingredients from Peru, a country perhaps primarily associated with ceviche but which of course offers a whole range of ingredients that are unfamiliar and fascinating to avid foodies. Yet this does not have the same impact on the cooking of top chefs themselves. Of course, it is exciting to see someone making dishes based on ingredients from a particular ecosystem at an altitude of several thousand metres above sea level, but it is difficult for even inveterate gourmets to replicate this.

The 2020s: spreading the word about everyday food

Now we are into the 2020s, the clearest trend that is emerging amongst influential chefs is the desire to reach a wider audience on TV or social media. The most prominent chefs are often seen on TV, either in their own shows or in cooking competitions. The cooking that seems to resonate the most is the kind that is eye-catching and watchable, but also widely broadcast and closely relatable to everyday life – like TikTok pasta recipes. Even top chefs are opening restaurants serving fare such as sausages, pizza and burgers.

It therefore seems rather late in the day to highlight "authentic" as the word of 2023, but perhaps this reflects what is missing rather than what is becoming more common. A fairer way to describe food trends emerging today is 'simple everyday', possibly slightly gilded at the edges – a touch of "la dolce vita", tasty but also familiar and accessible.

Some other examples of trends mentioned are those below, which we will return to later on in the report:

- Lunch boxes
- Local, sustainable and seasonal produce
- Fewer carbohydrates
- Keto diet
- Giving up alcohol
- Starting to eat more healthily

Consumers' views on trends

One way to pinpoint trends is to ask consumers – which we have done in 2017, 2019, 2021 and now.

The main difference in the responses this report compared to those from 2021 is that more people are mentioning special offers and low prices. This is in line with expectations discussed as part of public debate. As it is, at the time of writing, inflation has begun to slow down and some interest rates – at least those with longer terms – have started to fall.[6]

Two of the most common trends mentioned in both 2021 and now are "eating less meat" and "cooking at home" (in many cases, cooking from scratch at home).

While the impetus to cook at home in 2021 was very much driven by the pandemic, in 2023 it appears to be prompted more by higher prices and a poorer economy. To some extent, consumption is shifting away from restaurants and further towards homemade. Mike Knowles at Fruitnet believes that more upmarket chains like Marks and Spencer in the UK often fare just as well in downturns as they do in boom periods because the number of people buying more discount items are offset by those switching from eating out to home cooking.

Living in an unsettled world

Of course, consumption is just part of who we are and what we do as human beings. In many respects, people's behaviour and attitudes are a way of interacting with what is happening around us. At the moment, we are living in world marked by major changes that are difficult to navigate.

A geopolitical power shift

The world has long been heavily influence by the West. More specifically, it has been influenced by OECD countries. However, concepts such as BRIC (Brazil, Russia, India, China), Chindia, the Next Eleven and so on have been highlighted in describing an emerging world order, where the EU, the US and Japan are no longer such obvious dominant forces. Growth is now often higher in the poorer parts of the world, and more centres of power are coming to the fore. The shift in people's ability to pay and the market is also having an effect on the food industry. If Chinese and Japanese people pay more for cherries, then fewer cherries will be sold in Europe, because the seller is getting paid more in other places.

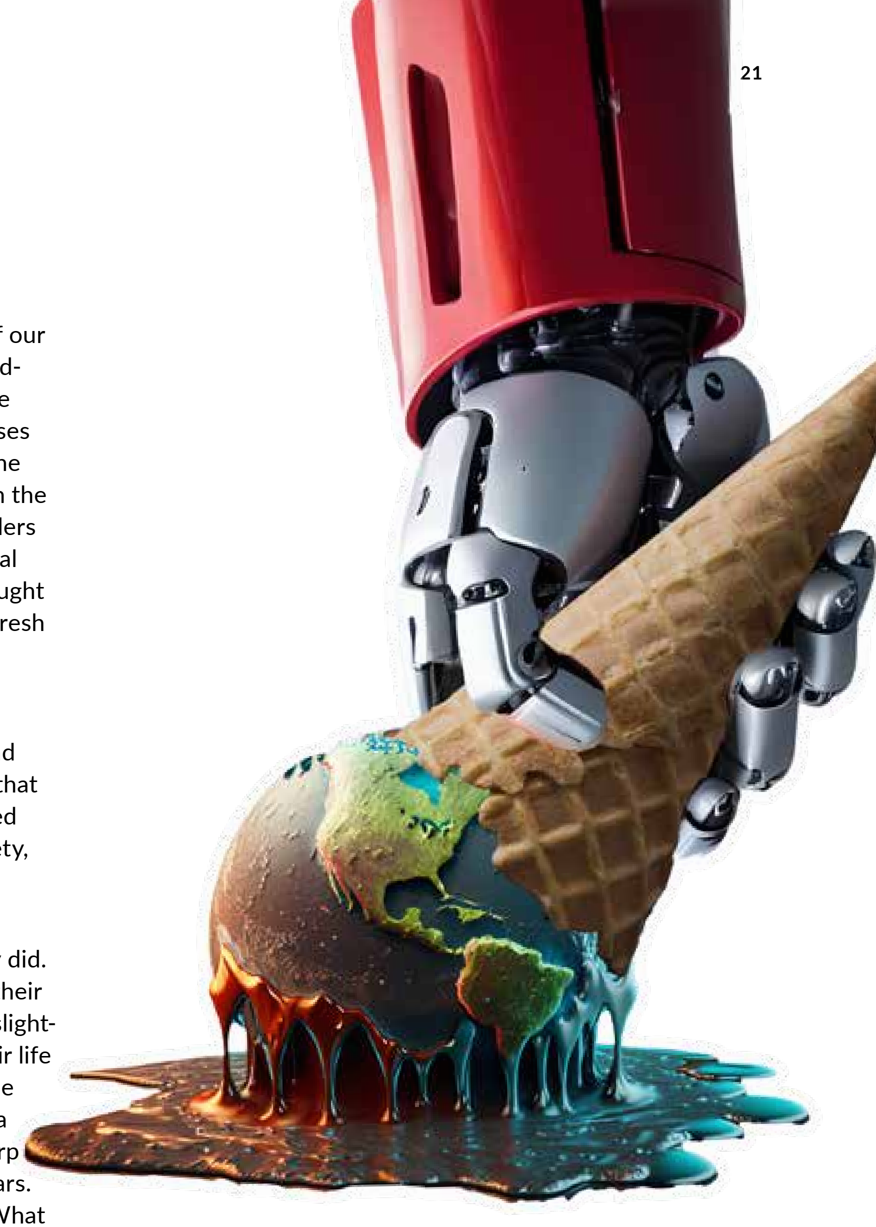
Geopolitical deterioration

2022 kicked off with Russia's invasion of Ukraine. This also marked the start of significantly tougher economic conditions for households. Energy prices rose sharply, which also affected many input goods and services for food production such as fertiliser and transport. Overall, inflation was substantially higher than before. In the EU, it hit 9.2% in 2022 – more than triple the inflation rate in 2021, which was 2.9%.[7] In addition to inflation, households have also felt the impact of higher interest rates.

Although the economic situation has improved somewhat since, the geopolitical situation remains serious. A new war has broken out on the fringes of Europe, between Israel and Hamas.

Human suffering on a scale not seen on Europe's borders for a very long time is now once again a tragic reality.

People, businesses and communities have experienced the effects of these conflicts in many ways. For example, Ukraine is one of the world's largest food exporters and its inability to supply produce has had a widespread impact around the world.



Environmental issues

Environmental and climate protection is the challenge of our times. For the produce sector a combination of stakeholder influence and real-world realities have aligned to make this a critical issue. Legislators have enlisted agribusinesses to play a leading role in addressing climate change and the preservation of biodiversity (EU Green Deal, CSRD) with the results that all supply chain actors from growers to retailers have prioritised sustainability. Simultaneously, in practical terms, climate events, such as extreme weather and drought in, for example, Spain, has exerted a material impact of fresh produce producers and marketers.

Insecure people seek purpose and meaning

There is growing concern worldwide over the widespread deterioration of mental health. One indication of this is that both adults and children are increasingly being prescribed various forms of medication for conditions such as anxiety, depression and sleep difficulties.

When asked in the study whether they see their lives as meaningful, 47% of all the respondents agreed that they did. In Austria, Germany and Poland, 50 to 60% considered their lives to be meaningful. In other countries, this dropped slightly to 40 to 50%. When asked whether they feel that their life is interesting, 37% agreed. It therefore seems that people have a relatively low opinion of their lives. Based on data from Sweden, we can also see that there has been a sharp decline in people's sense of meaning over the last 20 years. Of course, this could be due to many different factors. What is clear, however, is that consumers need to feel that there is meaning in their lives in order to feel good about themselves, and this is something that the food and meals can contribute to. A good start for recovery of mental health is eating more vegetables. According to research the improvement is comparable to finding a new job or a daily walk.[8]

Rapid technological advancements

Technological development is progressing at pace in many areas. The hottest topic at the moment, of course, is AI – most notably ChatGPT – but there is also solar energy, battery technology, electric drive systems, autonomous vehicles and so on.

There are various applications for new technology in the fresh produce industry, such as enabling more effective monitoring, optimising agriculture and forestry or improving weather analyses.

Lately, new diabetes medications that can also be used for weight loss have had a significant impact. Novo Nordisk has become the most highly company in Europe largely due to the products it has developed in this area. It will be very exciting to see how this shapes our outlook on food and meals in the future too.

Tough times – the economic reality for consumers

The fraught economic situation has left its mark on both consumers and the fresh produce industry. Discussions have revolved mainly around the prices of various foods, energy and input materials and services such as fertiliser and transport. Talk about promotional campaigns and prices has always played a prominent role, but occasionally these topics have had to take more priority than usual.

According to Fredrik Bendz from the market research company GfK, this has prompted various reactions from consumers across many European countries. On the one hand, the proportion of purchases from discount stores has increased. On the other hand, there has been a significant decline in loyalty to one particular store. Consumers are shopping around more and choosing the items they want instead of doing all their shopping in one place.

In general, individual purchases have gotten smaller, as is evident in fruit purchases, for example, with consumers buying fewer pieces of fruit at a time.

A number of chain stores and food producers are also facing major challenges due to a drop in the consumption of organic products. Food production processes cannot be changed quickly and when demand falls, the industry has to tackle the problems this creates. A lot of organic items have therefore had to be sold as conventional products. Consumption is expected to pick up again, as happened after a sharp drop in demand for organic goods during the financial crisis that started in 2008 for example. At the same time, however, dealing with this volatility is a challenge in itself.

Consumers are also aware that inflation has been higher than it has been for many years. When we asked consumers about the food trends they have noticed amongst their circle of friends and acquaintances, many of them pointed to the increasing cost of buying food.

High food prices are something that most of the consumers we interviewed were worried about: Six out of 10 strongly agreed with the statement “It is very important for food prices to be reduced”. On the whole, household budgets are being stretched further. Many people feel that their financial situation is worse than before. Four in 10 of those surveyed said they are finding it harder to afford to buy what they need now than they were a year ago, and just as many are saving less money now than they were the year before.

Unsurprisingly, those on lower incomes said they are having a harder time making ends meet than those on higher incomes, but interestingly, far more women (42%) than men (34%) have been finding it more of a struggle to afford what they need. Similarly, more people living in rural areas said they have been worse off compared to those living in big cities.

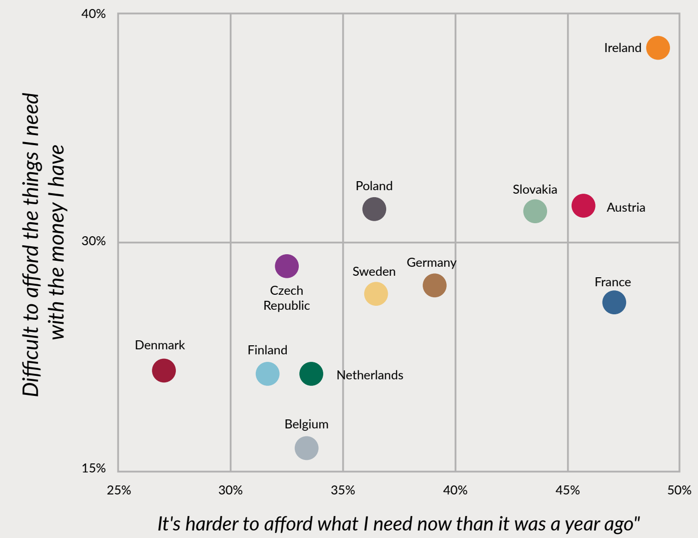
We can also see clear differences between different countries. Ireland (49%) France (47%) and Austria (46%) have the highest proportion of respondents who have found it harder to make ends meet, and these three countries also top the list in terms of how many people are saving less money.

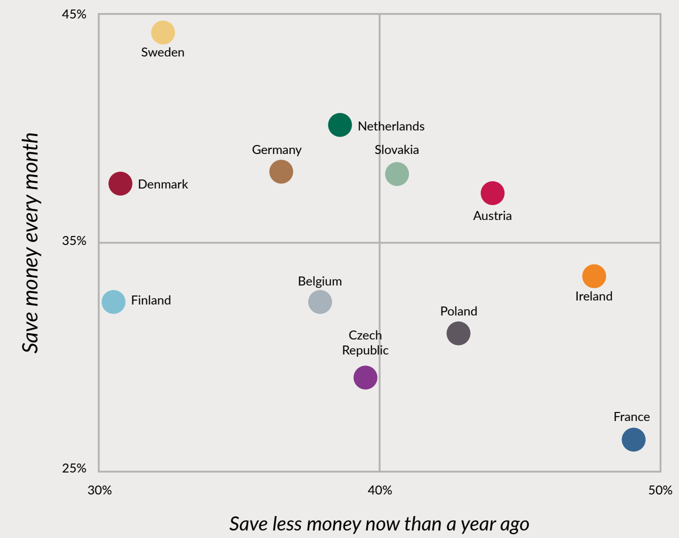
Ireland is also the country with the second largest number of people (21%) saying they find it difficult to buy enough food for themselves and their families. Slovenia is the frontrunner in this respect, with 42% stating that they find it difficult to buy enough food. The average across all countries is 13%.

The Nordic countries – Finland (30%), Denmark (30%) and Sweden (32%) – boast the lowest proportion of consumers who have reduced their savings. Sweden, which stands out as the country with the largest number of people (45%) saving money each month, is also close to the average in terms of how many people are finding it more difficult to afford what they need. This applies to 37% of the respondents from Sweden, compared to only 27% in Denmark.

The question of how much strain household budgets are under has an impact on consumption behaviour and priorities. Those whose finances have suffered more over the year are often the same people who think it is very important for food prices to be reduced, and they are also over-represented amongst those who take care to ensure that they don’t spend to much on their food shopping. Of course, this is to be expected – if you find it difficult to scrape together enough money, you have to prioritise keeping your costs down.

There is also a link with sustainability. Those who agree with the survey’s claims that the economic situation has got harder tend to say they are paying less attention to sustainability in their consumption choices.





The world goes round in cycles – and so do values

Dave Snowden, who worked for IBM around the turn of the millennium, developed a model called Cynefin at the time. The aim of this was to describe different contexts and help figure out how best to handle them. In other words, if the business environment and society are in a certain state, this needs to be met with particular types of decision-making and processes.

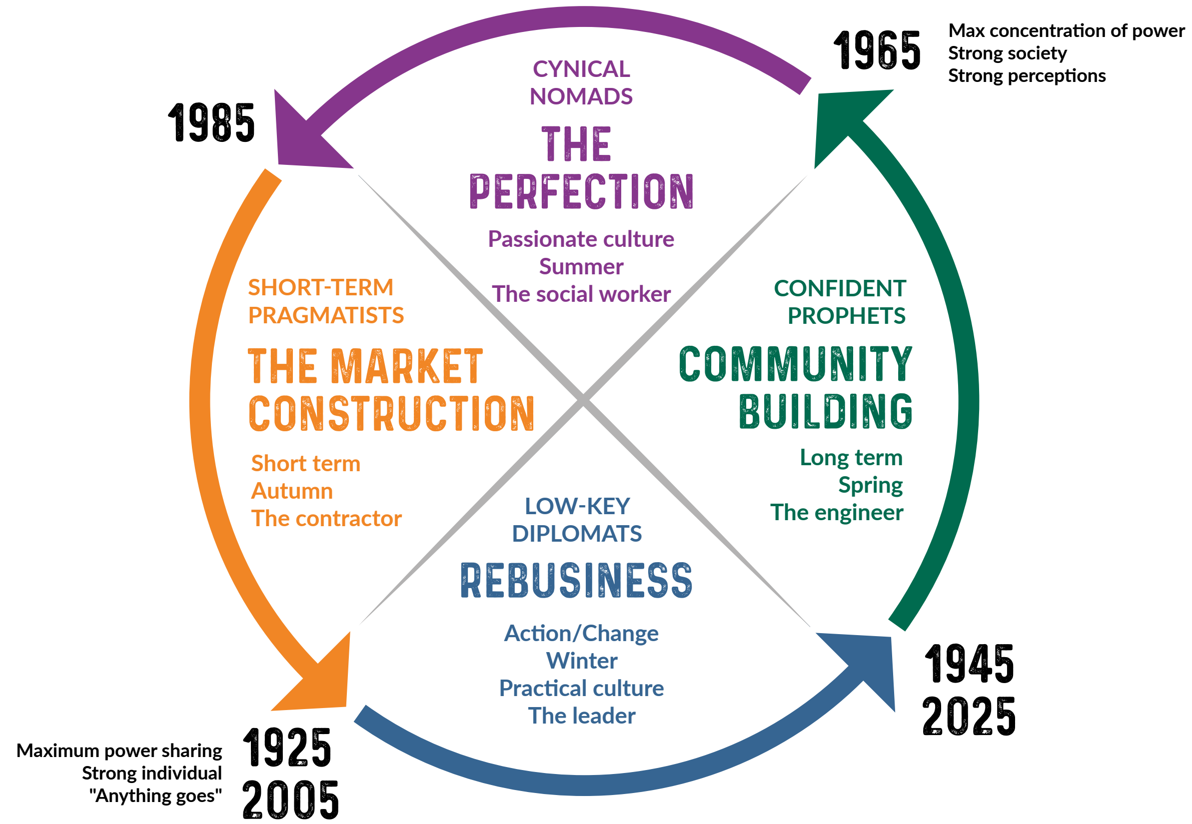
The four environments identified are: 1. Clear, 2. Complicated, 3. Complex and 4. Chaotic. The theory is that we move between these different domains, sometimes going through them in a cyclical pattern.

For a number of years, the chaotic and complex domains have been the prevailing contexts. Other have described this with alternative concepts such as VUCA (Volatile, Uncertain, Complex and Ambiguous). Another, later suggestion is BANI (Brittle, Anxious, Nonlinear, Incomprehensible). Call it what you will, it all comes down to the same idea.

It is arguably natural that a societal trend towards increasing uncertainty and complexity would steer people towards values that focus on everyday life, stability and security rather than innovation. Young people who have grown up with the financial crisis, the pandemic, Brexit, wars in Ukraine and Israel/Gaza and other such circumstances may not want to be presented yet more drama and excitement, either on the plate or in the news feed on their mobile.

There is a lot of evidence to suggest that values follow a recurring cyclical pattern as they evolve over time, a theory that William Strauss and Neil Howe, for example, described in their classic books "The Fourth Turning" (1997) and "Generations" (1998). These books are based on sources such as studies of different generations and their values and societies going back as far as 1584. If we look at data on generations, we see similar patterns to this day. The image to the right is an illustration of how values and society change in cycles, inspired by Howe and Strauss.[9]

Inside the circle, we see the values of the generation born in the respective period. Outside the circle, we see what characterises society during that period. For some decades, young people had been orientating more and more towards freedom, but now that trend has reversed. The younger generation is more cautious, thrifty and security-seeking than the 40- and 50-year-olds of today. An era of decentralised power, freedom and individualism is now being replaced by a period with a greater focus on loyalty and leadership. People are looking for leaders and a practical culture. Young people are stirring things up with their more practical attitude. They're drinking less alcohol, making their own bread and thinking about family and retirement sooner. The impact of this is visible throughout society. The boom in non-alcoholic beverages, which consumers in this year's study have also highlighted as a trend, has been particularly evident among younger people, but it has had an impact across large social groups. In France, 44% of the 18–25 age group said that they drink low- and non-alcoholic wine, while the corresponding figure for the 50–65 age group is 10%.[10] On the whole, non-alcoholic beer and other beverages are on the rise in Europe.



With new values coming to the fore, it is natural that different forms of control and security will become more important. The security that comes from a functioning family, close friends and small contexts that are easy to grasp is taking on a more prominent role and this is reflected in people's values, not least amongst young people. It is also important to distinguish between status and practice. Close friends and safe contexts are gaining status – not just because they are becoming more common, but also because they are sought-after.

In troubled times, it may be sensible to go back to basics in terms of supporting communities, helping animals, nature and society, and – not least – making sure that people are coping with their everyday lives. One example of this is taking care of basic needs such as eating, physical activity and socialising.

Food itself also represents something traditional, safe and authentic. We can expect to see a continued focus on food in the future, not only as a means of cultural expression and a symbol of identity, but also as something that signals life's focus on essentials, a functioning everyday life, continuity and predictability.

Here are some examples of current shifts in status for consumers and society:

- From freedom to friction and control
- From computer games to dancing and body contact
- From a focus on self to togetherness
- From social media to poetry
- From rights to loyalty
- From efficiency to resilience and preparedness.

These are not examples of what people are primarily doing more of, but of what they are lacking and want to be identified with – what they see as ideal and desirable. Status doesn't mean using social media the most – or eating the most frozen pizza, just because lots of people use social media and eat frozen pizza. In the past, people who prepared for the worst by securing their own fuel and burying supplies of canned fruit in the garden would have been regarded as mad. Now it's fashionable and a sign of status to be someone who is prepared. Among Silicon Valley's elite, for instance, it is increasingly common to have an escape plan – in some extreme cases, that means being ready to flee to an estate in New Zealand.[11]

Meals without a plan

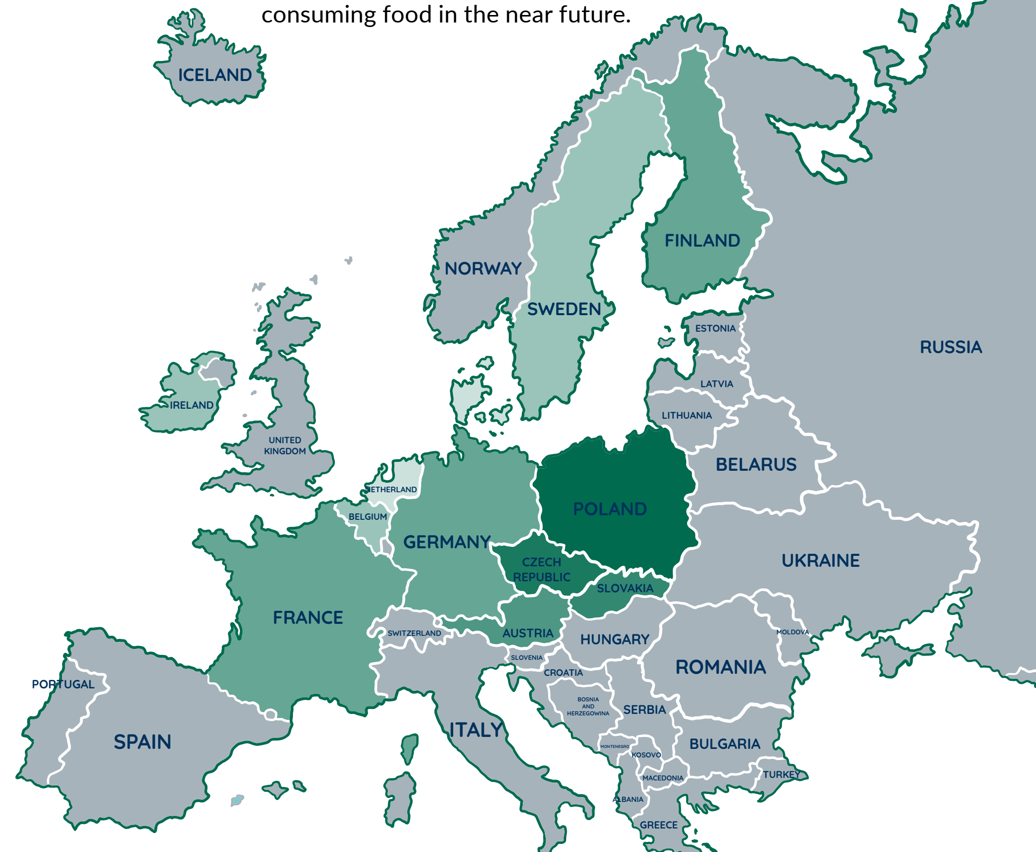
If we start from the hypothesis that context is central to understanding consumers, meals and the meal situations are high on the list of consumer activities we want to understand better. The context of meals has been changing for a while now. We are eating more often, less predictably and in smaller quantities at a time – this is sometimes referred to as grazing: like cows, we are tending to eat little and often, whenever convenient and without giving it much thought.

Perhaps the most surprising finding in this year's study is the difference between countries when it comes to meal planning. Eastern Europe stands out in terms of not planning meals. 53% of Poles decided what to eat less than an hour before dinner, while more than 40% of people in the Czech Republic, Slovakia and Austria decide on their dinner in the hour before. The difference compared to the Netherlands and Denmark is huge. In these two countries, relatively few people wait until right before a meal to decide what to eat.

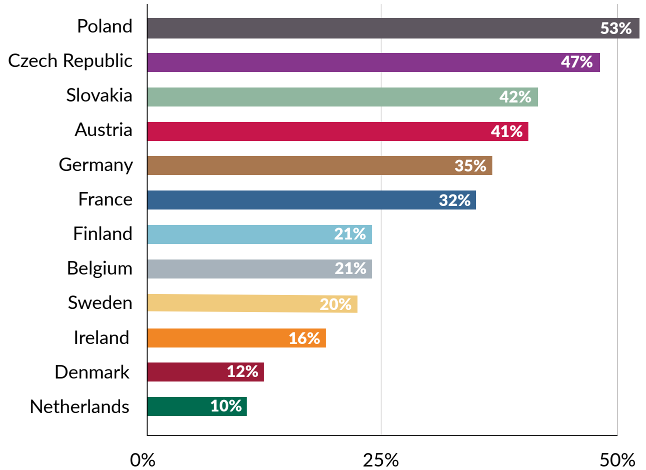
In other words, the conditions influencing eating habits in Poland and the Netherlands seem to be diametrically different. There is also a clear coherence with the way Poles, Czechs and Slovaks shop in stores. They are the ones most likely to choose items when shopping based on what they have a craving for, or because they need something to eat at that particular moment. This indicates a correlation that food companies should be aware of. In these countries, marketing, communications, products and services will sell more effectively if they use messages tailored to an audience likely to be consuming food in the near future.

53%

OF POLES DECIDE WHAT TO EAT LESS THAN AN HOUR BEFORE DINNER



Question: *"When did you decide what to have for dinner yesterday?"*
Selected option: *"Less than one hour before eating"*



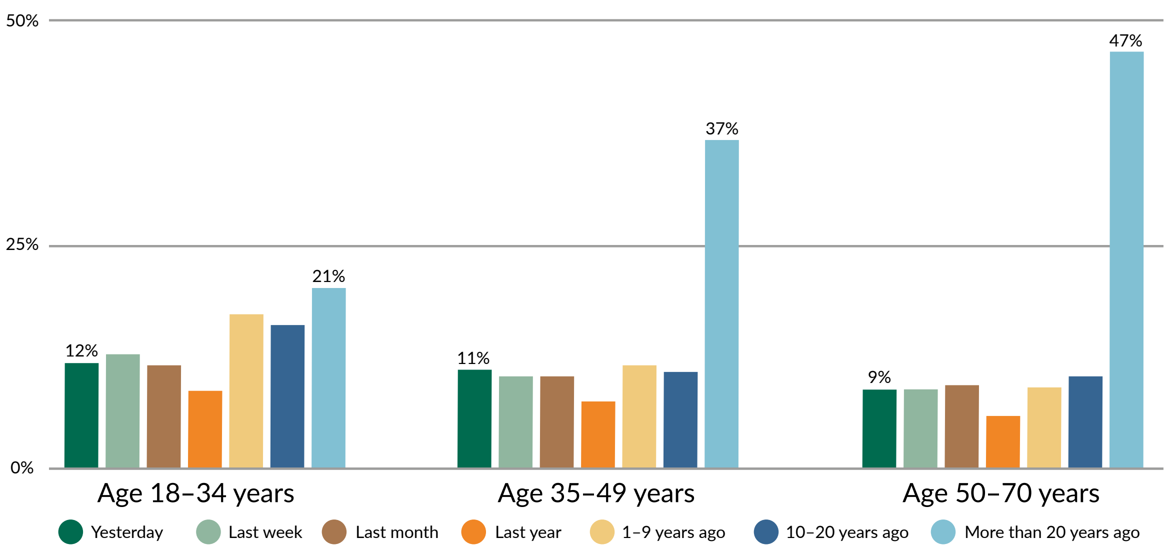
Responses from consumers are often influenced to a certain extent on normative behaviour: in other words, what they say sometimes reflects what they believe to be appropriate. With this in mind, it may be more considered acceptable amongst consumers in these countries to choose food based on a need in a given moment. People from the Netherlands and Denmark, on the other hand, would rather be associated with more planned approach to meals and shopping habits.

Taking a general look at what items consumers put in their basket when shopping, these are the top four types of products they opt for: 1. something to replace an item that was running out and needed to be replenished, 2. a cheap option, 3. something they particular wanted at that moment and 4. something they were inspired to buy while they were in the store. This ranking is relatively common in the countries surveyed, with the exception of the preferences in Poland, Slovakia and the Czech Republic as previously mentioned.

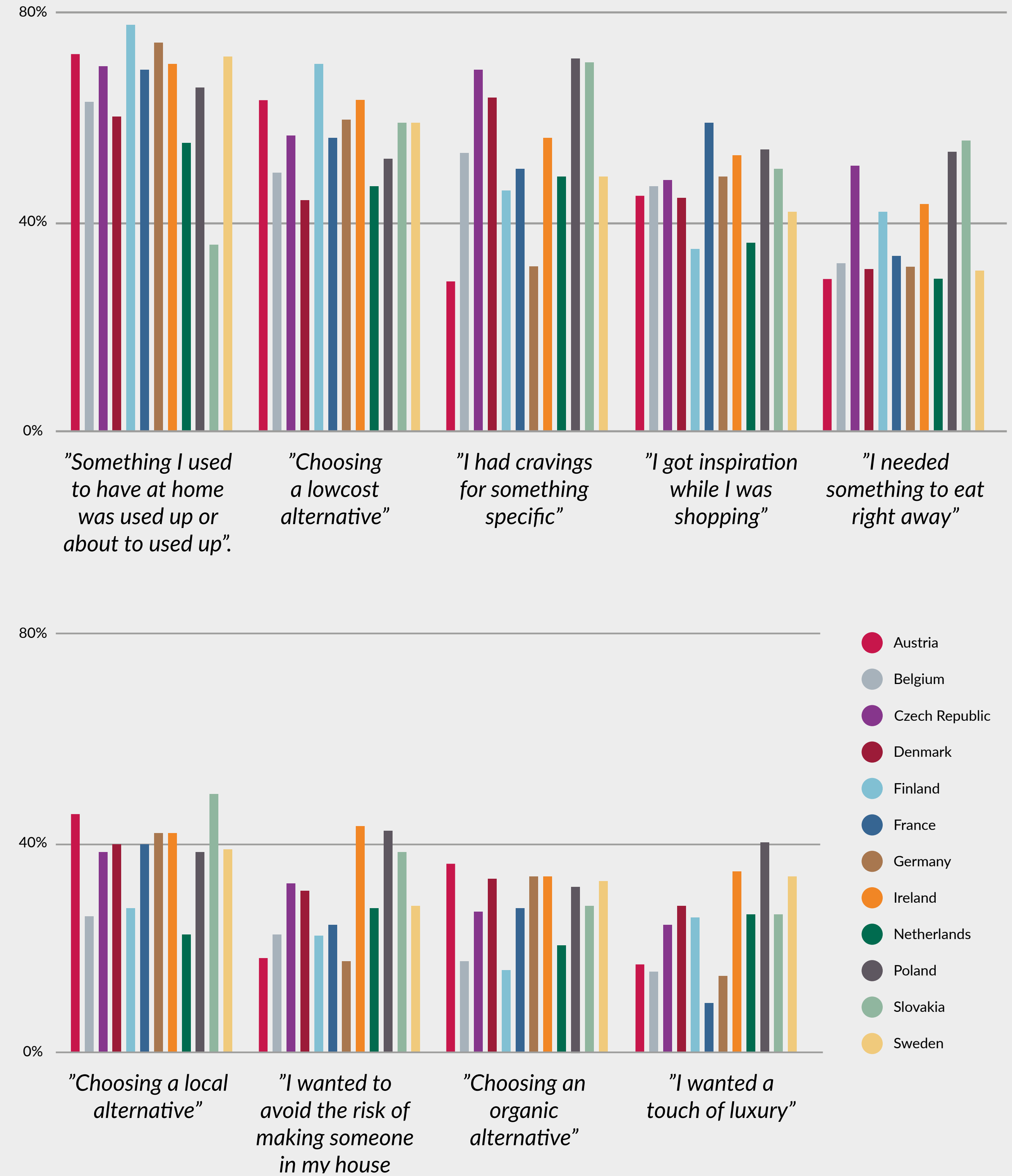
The replenishment model perhaps also reflects the presence of traditional items on the dinner table. When we asked consumers about what they had for dinner the previous day, we also asked when they ate that dish for the first time. Amongst the elderly, these were often dishes that they had first eaten as far back as 20 years ago. Some of the younger respondents have barely lived that long, but even for them, the most common response was that they had eaten something they had initially eaten 20 years ago. A substantial proportion of meals therefore involved something that had been around since the consumer's childhood. There was a significant proportion of people who ate something new, too, but to influence the vast majority of meals, it is important to adhere to established behaviour, and to start introducing new things at an early age.

When we talked to an ethnologist/anthropologist about those who spend long periods of time living with other families in other cultures, food was mentioned as the most difficult aspect. The aim of an anthropologist is to adapt and become a natural part of the local culture in order to understand that culture fully. In the case of food, however, this rarely works. It never really becomes possible to assimilate into the new food culture. Eating ants or extremely spicy food may not come as naturally both to the mind and to the stomach. A leopard can't change its spots – or at least only very rarely.

When respondents first ate the dish they had for dinner



What items consumers put in their basket when shopping



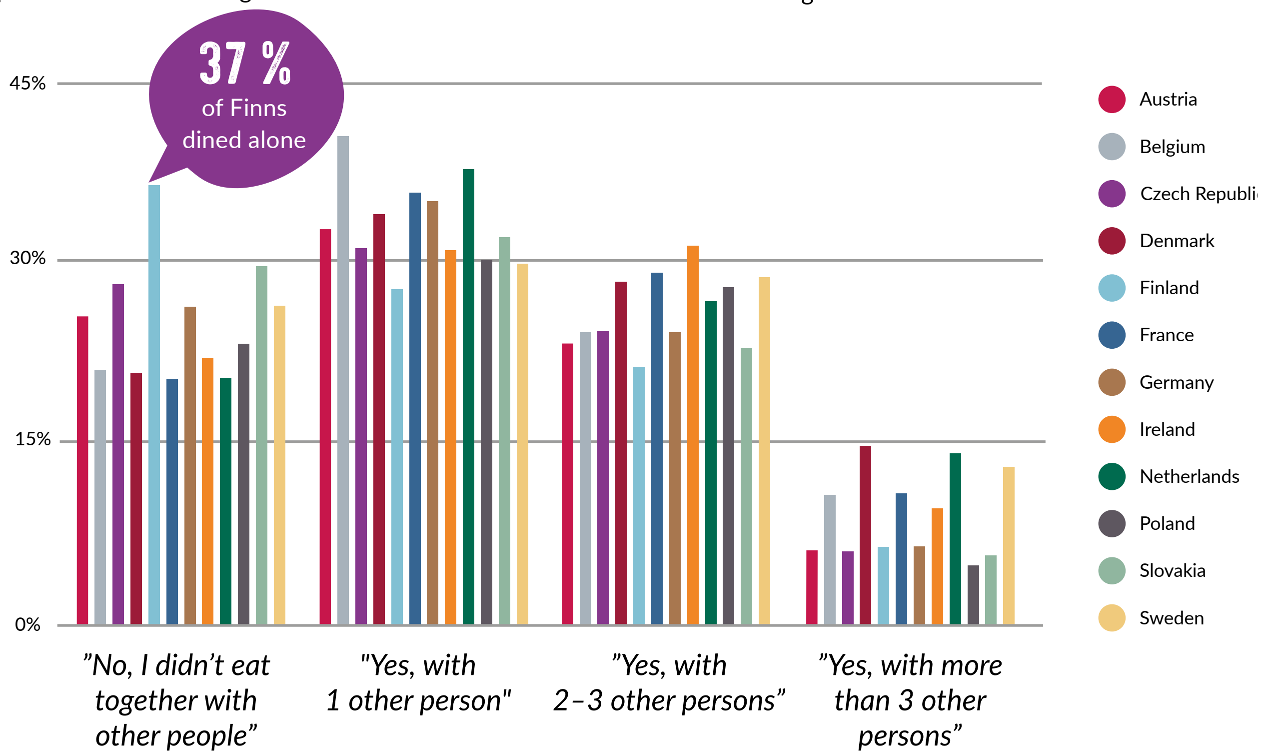
TAKING COCOONING TO THE NEXT LEVEL

Even before the time of mobile phones, it was becoming more common for us to eat on our own. Even families ate at different times, sometimes in different rooms. More and more children had their own rooms, often with TVs in them too, so meals were not shared like they used to be. With the advent of mobile phones, especially smartphones, you could say that meals have become an individual experience despite the fact that there may be several people sitting at the same table – more and more often, the people we are communicating with while we eat are not necessarily the ones we are sitting next to.

Faith Popcorn wrote the book "The Popcorn Report", which was published in 1991 and shot her to global fame. One trend she became associated with more than any other is cocooning, the idea that people shut themselves away in their own "cocoons", often at home, in search of comfort and security. This trend has remained relevant to this day.

Loneliness is now a growing global problem. It exists both as perceived loneliness and as a physical reality in the form of, for example, single households and eating alone.

Single households are a growing phenomenon in many European countries. Although this trend has now slowed down, in a number of countries single households make up around 40% of all households. Finland has the highest share, with 45%, and Ireland the lowest with 28%.[12] Now there is speculation about AI friends becoming "real" friends and even marrying AI bots. Having relationships with other people makes most people feel better, although this is neither a given nor without its tensions. In the study, we can see that eating alone is relatively common. Finland stands out in particular, with 37% of its respondents saying they ate dinner alone the day before. This is in line with the high proportion of single households in Finland, but is even more striking when it comes to dining.



If we look at some things in the study that correlate with solitary eating, we can see that those who eat alone are more likely to:

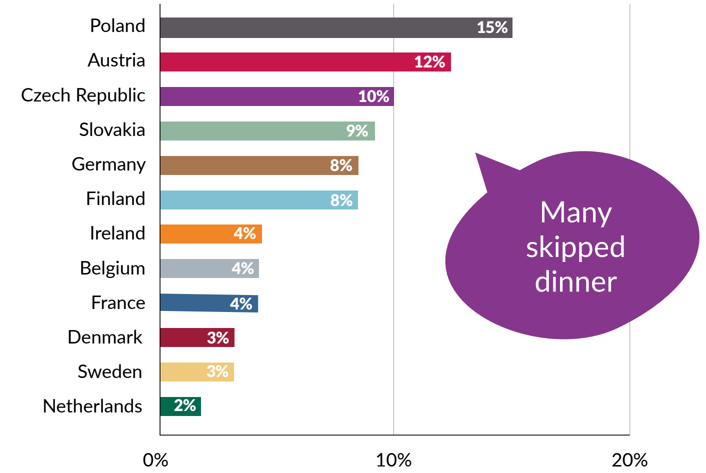
- live alone
- meet fewer friends
- think it's less important to eat with others
- have a lower income

The differences between people with different levels of education and between men and women, however, are small. These findings are not unexpected. It is reasonable that a person who eats dinner alone also tends to meet fewer friends and sees it as less important to socialise with others.

More alarming, perhaps, is the fact that solo eaters find their lives less interesting and meaningful, spend less time cooking, want their food to be quick to cook and eat less organic and local produce. We cannot say for certain that everyone feels good about spending time with other people on a regular basis. However, it is clear that poorer meal habits and quality of life are also associated with solitary eating.

At the same time, of course, it is better for people to have dinner on their own than not at all. Irregular meals have a tendency to also lead to skipping them altogether. In the study, we see that a lot of consumers admit to skipping their dinner.

Didn't have dinner the previous day



The UN's 2030 Agenda for Sustainable Development Goals covers a variety of areas, several of which deal with social sustainability. In light of the increasing issues surrounding mental health and the fact that some antisocial contexts seem to make people more vulnerable and lonely, the role of food and meals may become more important. Fruit and vegetables can play an equally, if not more, significant part in ensuring the sustainability of society by contributing to positive relationships and helping to create conditions that make people both eat better and feel good.

Wolfing down a sandwich or some other snack quickly on the fly may be an simpler solution for getting a quick energy boost, but it means that people compromise on an important part of their well-being: sitting down and eating with others.

LONELINESS ISN'T JUST BAD FOR YOUR HEALTH – IT'S DEADLY

"People who report often feeling lonely or being socially isolated are at an increased risk of death from any cause, new research suggests. Americans are now spending more time alone and less time socialising in person, compared with two decades ago, a trend that started taking hold even before the COVID-19 pandemic."

WSJ, 9 november 2023

Girl Dinner

One popular topic on social media in 2023 was the “girl dinner”. Simply, this involves showcasing and alluding to “pick-and-mix” meals put together based on walking into the kitchen and finding whatever is quick and easy to eat. This could be some kind of canned food from the back of the cupboard, a slice of bread, a few grapes, a fig, a piece of cheese or some crackers, for example.

There has been some debate about how bad this actually is, but it is suggesting simply mixing and matching whatever food items happen to be on hand, creating something that is clearly not intended to be eaten like a proper dinner in pleasant company. It could in fact be seen as encouraging a tragic and unhealthy view of meals – or even of life in general.

Anyone who wants to promote fruit and vegetables should not underestimate the need to get people to sit down and eat a proper meal and socialise with other people, thereby benefitting society and boosting social sustainability.

Mintel’s 2024 Global Consumer Trends report features as one of its key trends the “Relationship Renaissance”:

“Consumers who find comfort through screens at the cost of meaningful, real-life relationships, will seek new forms of intimacy for the sake of their physical and mental health.”

What Mintel is highlighting here is the fact that the absence of meaningful relationships makes people yearn for them more. People are missing relationships, or wishing for better ones. So the trend is not about what we are seeing more of across broad groups of consumers just yet, but what we are craving more and more.

Advertising campaigns based on this and making references to togetherness are ubiquitous, featuring slogans such as “Creating the future together”[13] or “Unlimited together”.[14] Eating together has been something that unites and builds relationships between people for as long as humans have existed on Earth. It is time to get back into that habit a little more often.

LUNCHING IN LOUNGEWEAR

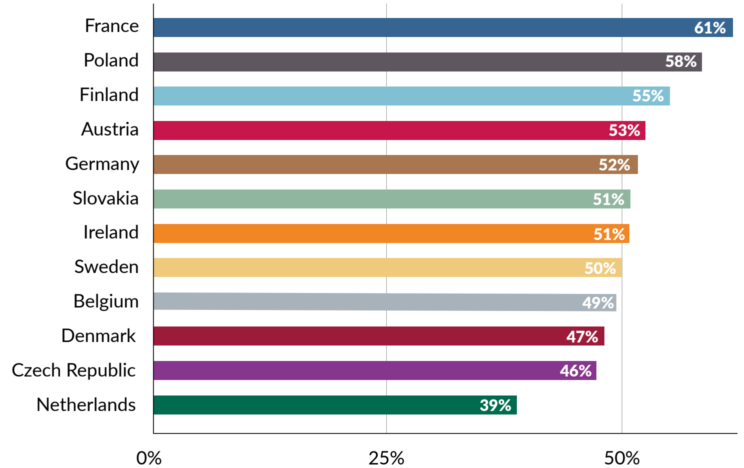
The general idea is that it should be possible to get consumers to eat vegetables for dinner and convince them that it is good to eat fruit for snacks. Breakfast can also include berries or frozen fruit, perhaps in yoghurt or a smoothie.

One major meal – lunch – is in danger of being forgotten, especially lunch at home. When we asked respondents about what they had for lunch the day before, it turned out that only 51% of their lunches contained any fruit or vegetable There are no major differences between weekday and weekend lunches – there are (too) few vegetables involved in both cases.

Of course, it is regretful to anyone who wants to protect human health and well-being that a large proportion of consumers do not eat any fruit or vegetables for lunch.

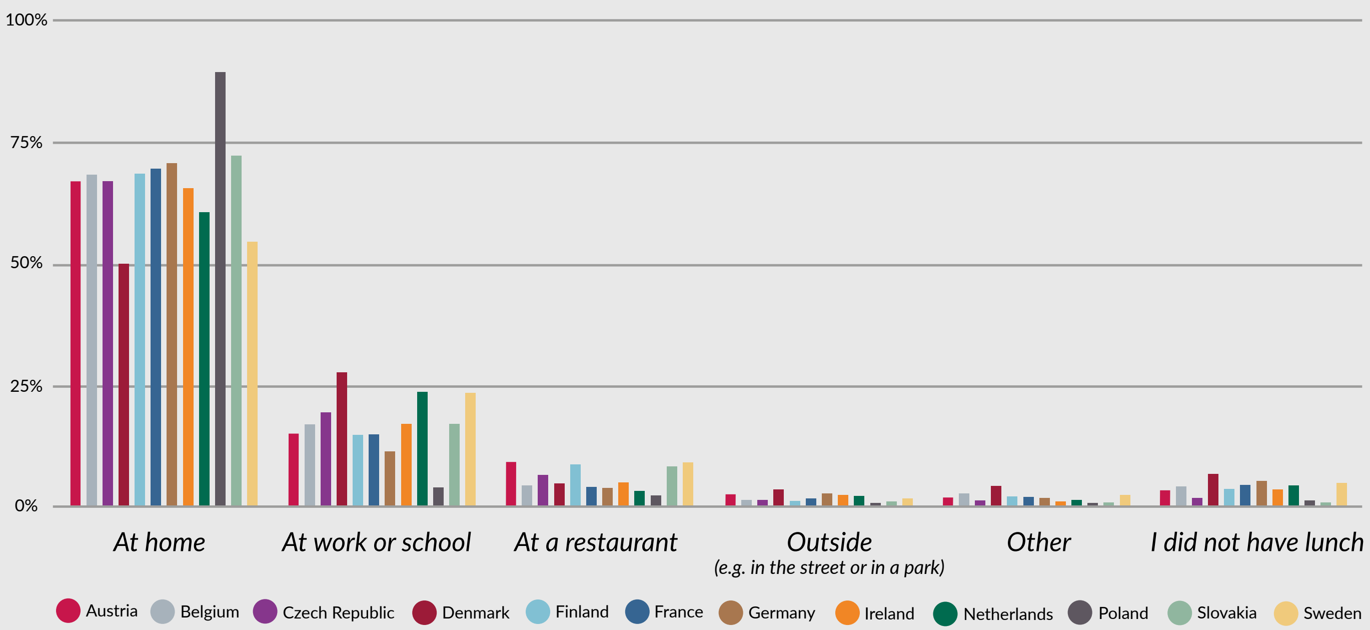
To be able to influence these people, we need to understand the context here too and one important insight in this respect is that two thirds (67%) of lunches are eaten at home. This proportion goes up slightly at weekends because lunches in workplaces and schools take place almost exclusively on weekdays. Nevertheless, lunches at home make up a very large part of the overall total.

Share of respondents who did not eat fruit or vegetables at their last lunch.



TWO-THIRDS OF THE LUNCHES ARE EATEN AT HOME AND RARELY INCLUDE ANY FRUIT OR VEGETABLE.

Where did you eat your last lunch?



Goblin Mode Lunch

As office work has been replaced by hybrid working and eating at home has become more common since the COVID-19 pandemic, a new need has emerged. Consumers need to build routines around their midday meal. Irregular mealtimes have long been a public health concern.

The French social scientist Claude Fischler is world-famous for his research on food and meals. Amongst other things, he became known for the concept of "gastro-anomie", where the suffix "anomie" stands for the disintegration of normal standards. We move away from old norms, but we don't know what to do instead and what the new ones should look like. This very term was very much referring to the fact that regular large meals were being replaced by multiple mealtimes, often irregular and involving smaller portions – a bit like what we now call the snacking trend.

What we are now seeing may be a new "anomie" or lack of standard practices. A "lunch-anomie", if you will.
There has been some talk about people taking part in video meetings while sitting around in loungewear – since no one can see what they are wearing, people can focus on what feels comfortable rather than what looks smart. On social media, this is referred to as "goblin mode", a term that was named the word of the year in 2022 by the Oxford English Dictionary:

"A type of behavior which is unapologetically self-indulgent, lazy, slovenly, or greedy, typically in a way that rejects social norms or expectations,"[15]

The casual practice of wearing loungewear may well have influenced lunch habits.

How do we eat lunch? What is a suitable lunch? When is it eaten? Where is it eaten? With whom? Fifty years ago, none of these questions were asked very often. Who cooked the food was decided in the workplace or in the home. International dishes were rarer and people often had less choice over who to dine with. Few people may yearn back to those days, but it was easier to get a proper meal that way and it was meals that brought people together.

In the long term, it might be best to bring back more communal meals. One solution in the short term is to try to improve lunches in the context that exists today, for example by bringing back lunch boxes. For those who eat at home, it might help if their midday meal is prepared the night before. You could draw on concepts that have already grown in popularity in recent years – amongst YouTubers for example – such as are batch-cooking, one-pot or one-pan meals or roasting tin dishes. These phenomena spread as inspiration for recipes and, like the lunch box, they also offer examples of life hacks – something which consumers also mentioned in the survey. Different ways to make lunch better without too much effort are valuable.

As one expert involved in the survey put it: "leftovers are the salvation of everyday life". By cooking in sufficient quantities, you can make sure there is plenty of well-cooked and nutritious food left for, for example, lunch the next day. When hunger strikes at the last minute, there is no need to fill up on pieces of bread and small snacks just to scrape together half a lunch. Instead, there will be a lasagna ready and waiting for you, with a third of the minced meat replaced with finely grated carrot and a creamy sauce with a lot of grated Parmesan. Or a hearty ratatouille containing whole tomatoes, onion halves, bell peppers, garlic, squash (which always seems to leave you with some left over) and aubergines boiled together into a thick sauce that can be eaten quickly with meatballs or diced chicken.

The trick is to cook when you are not hungry – in other words, the day before. Make sure the good stuff is readily available so that it is on hand when you get those hunger pangs – because by then it is often too late to get your act together and prepare a good, healthy meal from scratch. If there is a tomato quiche already in the fridge, you are more likely to end up having a nutritious lunch. Or as we suggested in an previous report on fresh produce, give your kids some cucumber and carrot sticks before dinner – and you can be sure they'll eat it.

OUR BRAINS ARE FULL, BUT OUR HAND ARE FREE

People today find it hard to concentrate and come up with ideas. Some argue that aphantasia is on the rise – the inability to picture things in your mind that are not actually there. There are also studies that indicate a general decline in creativity.[16]

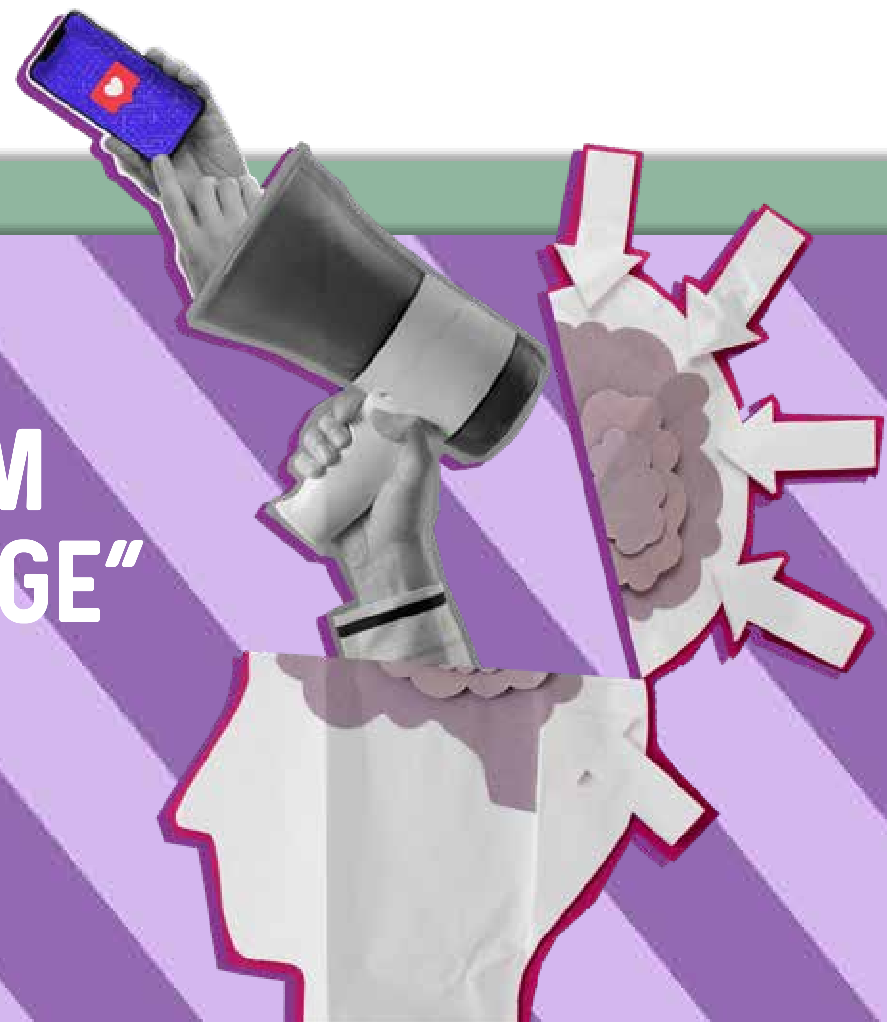
It appears that mental fatigue is becoming more common. When it comes to buying and consuming products, people are increasingly prioritising "mental convenience". Consumers don't want to have to think. Recipes and inspiration should ideally come pre-packaged and require minimal mental effort.

Weekly recipe lists have been around for decades. Now there are a few more variations on this theme, with ready-prepared ingredients for a weekend dinner available in stores, for example, sometimes pre-packaged. One life hack mentioned in the survey is to go and take a look at a weekly menu that someone else has posted online and cook the same things.

In recent years, ready-prepared meal kits offered by different companies and a range of food boxes from various food chains have become more common. These were perhaps originally launched in response to a need for variety, but now they have perhaps transitioned to become just as much about convenience, offering a solution that does not demand so much brainpower. Thought activity is reduced to a minimum – and ultimately you enjoy a good meal too.

In the past, the grocery bags or weekly fruit and vegetable boxes delivered were pre-arranged by the supplier, so consumers did not have the option to select which meals or vegetables they would get. Now that consumers get to choose, there is bound to be a little less variety. For most people, the odd and unexpected tend to be less popular.

"THE MEDIUM IS THE MESSAGE"



Brains overloaded by media

"The medium is the message" is one of the most famous quotes in media history. This phrase was coined by Canadian communication theorist Marshall McLuhan, who said, amongst other things, that the existence of a medium changes people and society. The light bulb was a medium that made it possible to do other activities when it was dark, such as reading books during the evening, when for many people the working day was over. In McLuhan's day, the big innovation was the television. Film and television had a huge impact on the way we looked at life. Today, many people are wondering about the impact social media has on society. In a TED Talk, Tristan Harris[17] described how he has worked to attract people's attention, which is a key success factor for major media players in general. However, Harris believes that this is harmful to humans. He also mentions that Netflix's CEO once claimed that the streaming giant's main competitors are YouTube, Facebook and sleep.[18] Harris' plausible thesis is that a service which wants users to sleep less doesn't have the best interests of its consumers at heart.

The consequence for food companies, in addition to the fact that the media landscape has evolved and requires new forms of communication and marketing, is that consumers are to some extent acquiring new habits and needs. TikTok, Facebook and YouTube may provide inspiration for cooking, but in practice they are also competing for attention. The choice stands between roasting cauliflower and checking TikTok, YouTube or any other desired or unwanted distraction.

Cindy van Rijswick from Rabobank talks about a need for food and meals that offer mental convenience. We think this is a concept worth bearing in mind. There is more to do in this respect, not least for the fresh produce industry. What can you do with a turnip, an aubergine or a pointed cabbage? Or as someone put it in reference to citrus fruits, since clementines are increasingly selling better while oranges have been seeing a decline in consumption for a while: "I don't know if anyone can peel an orange anymore". It will becoming increasingly important to get consumers to stop thinking too much and just do. Is it time for a "just do it" campaign? Or a challenge on how best to peel an orange?

WHERE ARE THE WORLD CUP VEGETABLES?

The prevalence of fruit and vegetable brands is worryingly small. In today's consumer society, brand building and marketing are an integral and necessary part of how the market works. We all know Coca-Cola or Nestlé would not do as well without marketing, and neither would Nike or Adidas for that matter. The fruit and vegetable category as a whole would benefit from the additional promotion brands can offer. And the investment brands can put into new product development, packaging and consumer engagement, can help stimulate consumption and sales.

Today, brands are largely absent from the fruit and vegetable section of the supermarket. Of those that do exist, the most famous ones in the countries surveyed are brands like Chiquita, Dole, Pink Lady, and Zespri.

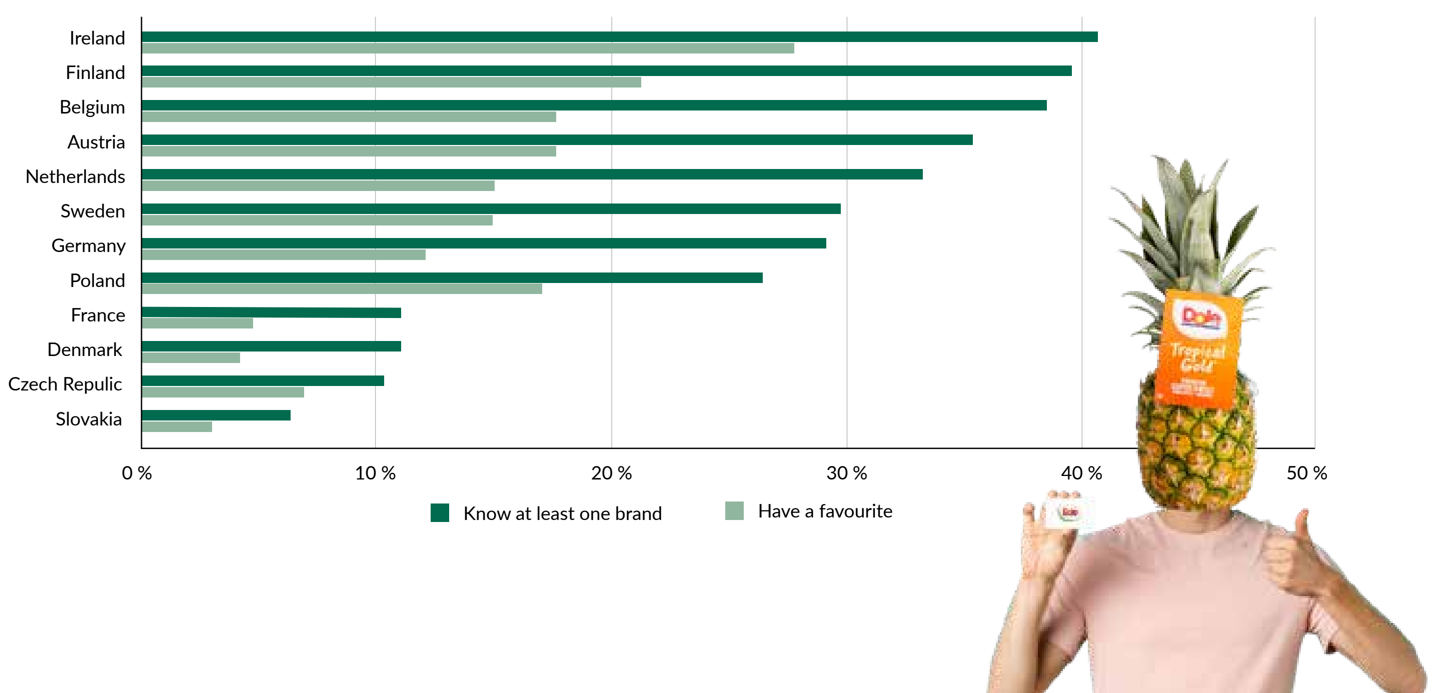
Overall, however, brand awareness is very low. The countries that do have some notable brands are Ireland, Finland and Belgium.

Belgium is the country where the most brands are mentioned overall, including a couple of local ones along with the most well-known brands that feature in the survey.

Pink Lady offers an example of effective produce marketing. To start with, there was patented, popular apple variety. The key lay in controlling all production and distribution. Only those under this controlled system were allowed to produce the apple. The result is that the marketing activities carried out increase the revenue from Pink Lady applies in particular and the premium brand that is built up on the back of this will benefit the network that owns the brand. From a commercial point of view, the fact is there is someone driving demand through various forms of marketing provides security. Unfortunately, this does not work as effectively when the benefit of increased consumption does not accrue in the same way to the person who invests in the marketing, as in the case of Red Delicious or Granny Smith apples.

Zespri was originally a specialist in kiwi fruit from New Zealand. Here, too, a high level of quality control has helped make it possible to charge a premium price for the product and create a brand promise that generates credibility and higher revenues. It is also interesting to note which markets Zespri has focused on. A quarter of the fruit it produces is sold to Japan. Between 2008 and 2018, Japan's kiwi fruit imports basically doubled.[19] Japan is probably also the market with the greatest difference between premium and low-price products in many fresh produce categories. Two beautifully packaged strawberries can cost the equivalent of EUR 6. There is probably no other country in the world where consumers have the same understanding of terroir and merroir – in other words, the distinctive characteristics of the soil or marine environment that food comes from, which season is best for different produce and other in-depth knowledge.

Brand knowledge



The fact that Zespri is known in a few markets in Europe and Asia may be due to its more effective marketing, with a focus on a few attractive markets.

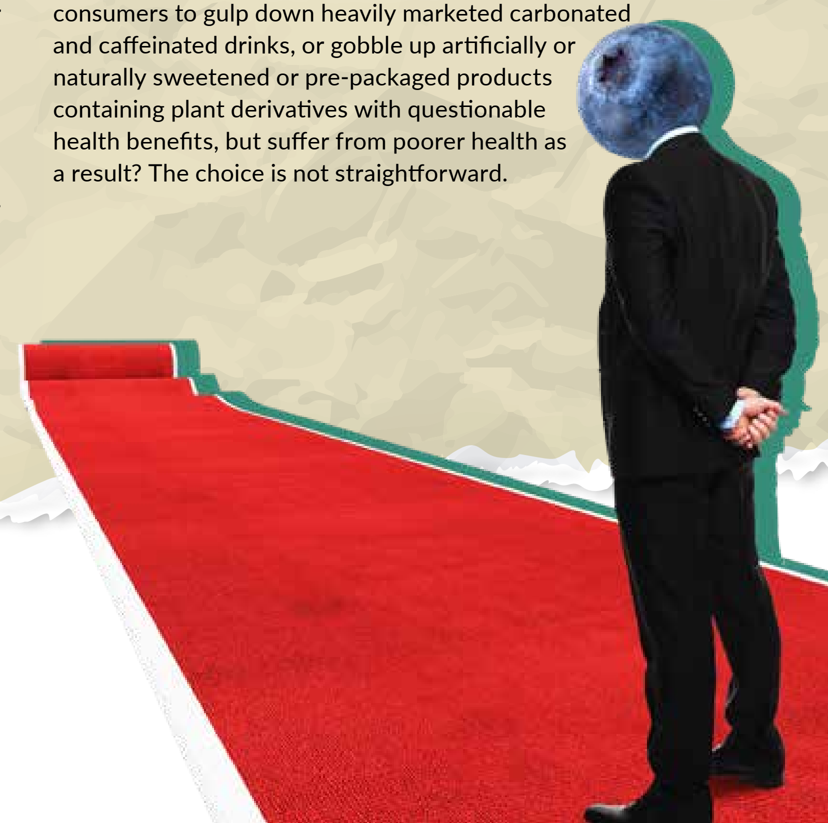
In the US, it is clearer that there are brands which are widely known. In Europe, it is currently more difficult to achieve the same premium effect for any brand. When we talked to Cindy van Rijswick from Rabobank, she said that this year she chose to go to a trade fair in Anaheim[20] rather than the one in Madrid.[21] Her impression is that there was more innovation at the trade fair in the United States. There probably is a connection here: where brands are recognised and production is vertically integrated, there may be more scope to innovate and develop new products. There is even advertisement for avocados at the Superbowl, the biggest marketing event in the U.S. When will we see major fresh produce brands and products at global sports events such as the World Cup in football? Or, if we stretch our minds a little, when will a fresh produce brand do what a toy brand did and took their Barbie to the movies. Will we see a peach becoming a Disney Superhero? And when is a livestreaming fennel a top influencer?

In 2022 and 2023, in the wake of rising interest rates and high inflation, the application of private label brands increased in many countries, including some where it had previously been less prevalent. In the absence of support for recognisable premium brands, there is also a better opportunity than ever to differentiate the range on offer through cheaper private labels. In a GfK 2022 survey of 15 European countries, 59% of the respondents stated: "I plan to stick to cheaper brands". Of course, it becomes difficult for consumers to choose cheaper brands when there are neither expensive nor cheap brands available.[22]

Brands also appeal to consumers in different situations and as a means of expressing different identities. In major cities, black t-shirts from 100 different brands can be sold to consumers, appealing to how they want to feel and what they want to identify with. The number of luxury brands in the clothing segment alone is huge. If there were as many iconic brands and identities for apples as there are for clothes, would apple sales increase?

Some markets, for example, have enjoyed some success in driving the consumption of berries. In the UK, this has been achieved by berry producers joining forces and coordinating their marketing efforts. In Norway, BAMA, the leader in the fruit and vegetable market, is a company co-owned by two large grocery chains and a family. They have managed to push up berry consumption to 4.7kg per person per year, which is probably the highest in the world.

Let's imagine for a moment that gooseberries are a proprietary product. What would that mean? Marketing would perhaps be quintupled, turnover quintupled, research and development tripled, new packaging introduced and more varieties developed. Profitability would possibly see a fivefold increase. Someone owning the recipe for gooseberries may sound like an awful scenario, but is it better for consumers to gulp down heavily marketed carbonated and caffeinated drinks, or gobble up artificially or naturally sweetened or pre-packaged products containing plant derivatives with questionable health benefits, but suffer from poorer health as a result? The choice is not straightforward.



A little help from the government?

The flip side of the smaller-scale and less-developed marketing of healthy food such as fruit and vegetables is the aggressive promotion of its opposite – unhealthy food.

“Unhealthy food marketing/persuasion is a systemic threat”[23], as Tim Smits, Professor of Persuasion and Marketing Communication, puts it.

There are many societal challenges linked to unhealthy food, such as poorer health and a steadily increasing share of public spending going towards healthcare. In other words, solutions for curbing this development are urgently needed.

Many countries across the world have introduced various forms of taxation on food and drink known to have negative effects on public health. Alcohol and tobacco are famous examples, but even soft drinks are often subject to taxes.

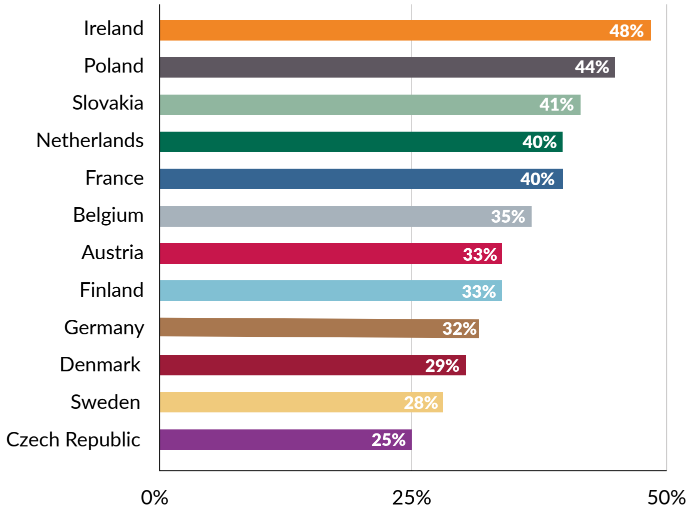
There are of course, measures designed to promote healthy food, such as the EU School Fruit Scheme. In Belgium, a proposal was recently put forward to remove VAT on fruit and vegetables, so there are examples of positive action but more can be done in this area.[24]

More and more countries are beginning to regulate issues related to food, including food waste, unhealthy food, packaging and more. This shows that there is a trend towards more regulation worldwide, not least in the EU.

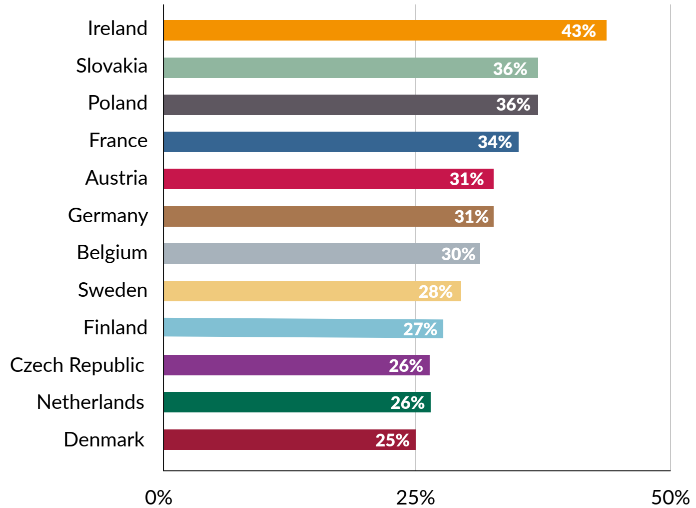
The EU has come to be regarded by many as a pioneer in regulation for the whole world. One book published on this subject is “The Brussels Effect: How the European Union Rules the World” by Anu Bradford. The idea is that the EU has the organisational setup, experience and expertise to regulate and that this particularly impacts on business involved in various markets. They have to adapt to EU regulations in order to operate in those markets. And since the US, for example, does not regulate to the same extent, the EU is increasingly becoming the centre point for defining regulations on a global level.

We asked consumers in the survey how they viewed this.

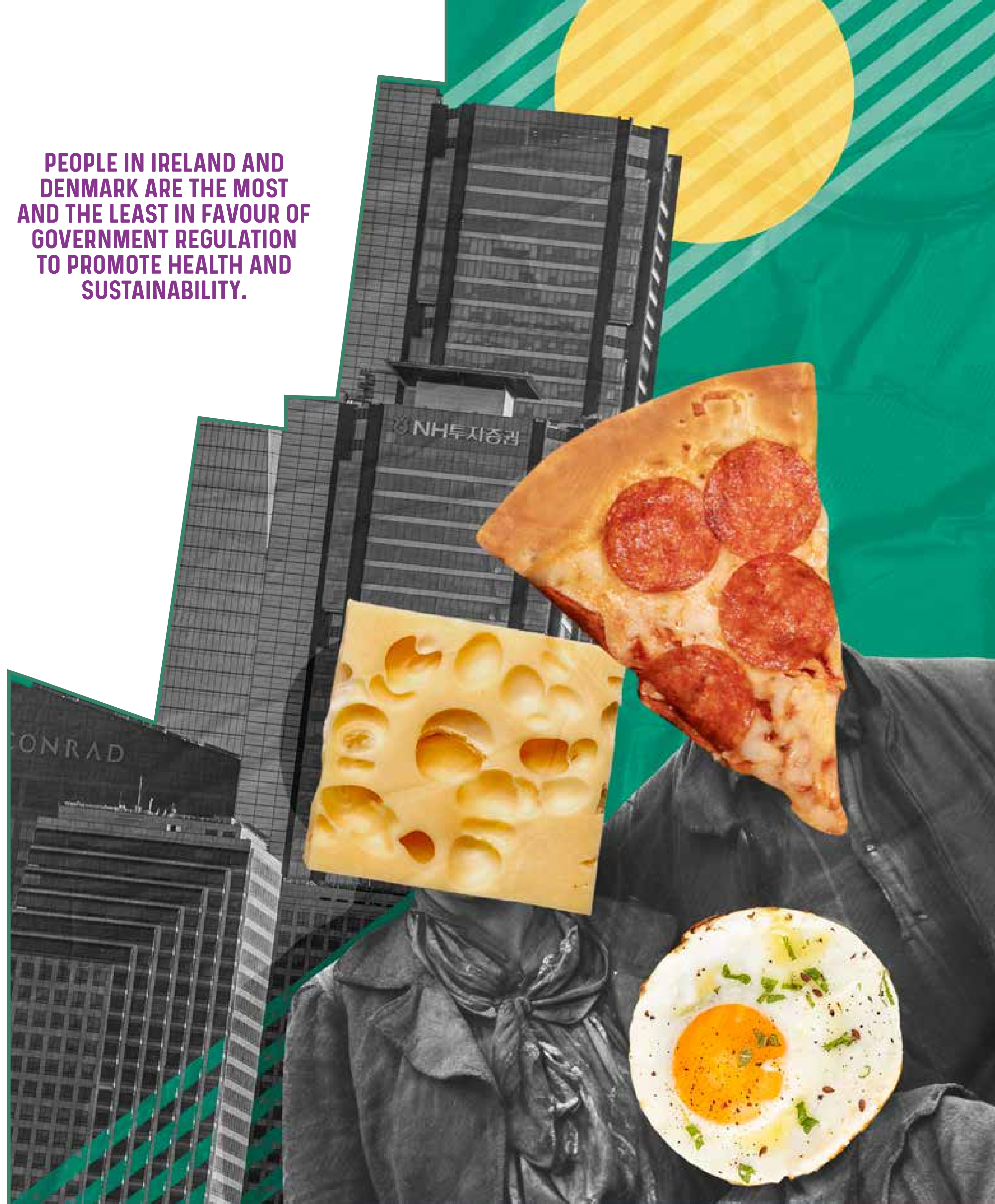
Governments should take more action to promote **healthy eating habits** among the population.



Governments should take more action to encourage **Sustainable food choices** among the population.



PEOPLE IN IRELAND AND DENMARK ARE THE MOST AND THE LEAST IN FAVOUR OF GOVERNMENT REGULATION TO PROMOTE HEALTH AND SUSTAINABILITY.



THE MANY DIFFERENT FACES OF CONSUMERS

Consumer personas identified

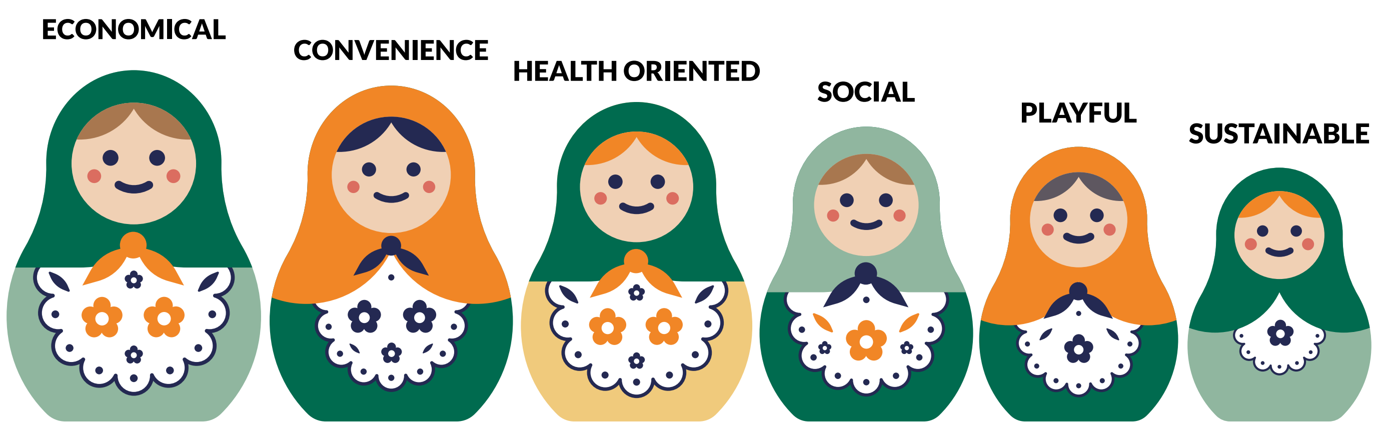
We have previously worked with the LOHAS and LOIGAS consumer groups. LOHAS stands for "Lifestyles of Health and Sustainability". It is a relatively well-known and frequently discussed target group amongst marketing experts. It has been claimed that as much as 30% of the US population were LOHAS consumers in 2006[25], but of course that depends on how the group is defined and who you ask. Its opposite has been referred to in previous fresh produce reports as LOIGAS: "Lifestyles Of Instant Gratification And Stability". As LOIGAS is not a fashionable target audience, there is a risk that marketing will overlook this group. Yet since they are also low consumers of fruit and vegetables, increasing their consumption levels is a matter of particular urgency.

In this year's survey, we have taken a closer look at different consumer groups to get a more multifaceted picture. It turns out, for example, that LOHAS is no longer as homogeneous a group as we expected.

The six consumer groups

The six consumer groups identified in the study are broken down according to what they prioritise most when buying, eating or cooking food. The size of the figures shows the size of the representation of each group amongst the survey respondents. The top priority by far for most consumers (73%) is that the food tastes good. We could therefore say that there is a common denominator. In terms of other priorities, there are six distinctive groups.

Of these, those who prioritise economic aspects are the most prevalent, most closely followed by those who prioritise convenience and those who prioritise health. There is also some overlap between the groups, so the same consumer can belong to two groups, for example, depending on the meal situation. The sustainability-oriented group is the smallest. 2023 was also a year with a strong focus on price and declining sales of organic products, which can be explained to some extent by current circumstances. At the same time, sustainability issues have also been topical and climate change is making itself felt in various ways in different parts of the world.



Economically-oriented

Economically-oriented consumers place the greatest importance on ensuring that do not spend too much money on food. These are distinguished from other consumer types in the following ways:

- They find it difficult to get hold of enough money (37%, compared to 17% amongst the other consumers), and they feel that things have got harder over the past year (48%, compared to 27% of the others).
- They are less likely to save money each month (30%, compared to 41% of the others) and they are saving less than they did a year ago (47%, compared to 29% of the others).
- They tend to choose low-cost products more often (66%, compared to 46% of the others) and are less inclined to choose local (32%, compared to 42% of the others) and organic options (23%, compared to 33% of the others).

This group is particularly large in Finland, Ireland and France.

The word cloud is showing what these consumers do to keep costs down.

Appealing to economically-oriented consumers is essential. At the same time, the reality is that sales of fruit and vegetables are widely regarded as a form of commodities trading, an industry without strong brands. Consumers, especially in times of recession, are happy to buy discounted goods. In other words, it is no surprise that goods on offer and available at reduced prices sold well in 2023. And that does not just apply to fruit and vegetables. In the consumer goods sector, there is also an element of "perception is reality". If something was previously more expensive and is now being sold more cheaply, the consumer will be satisfied. Fruit and vegetables needed more premium products that could be discounted, not for shelf-life reasons, but to appeal to consumers' willingness to grab a bargain.

Convenience-oriented

Those who prioritise convenience particularly appreciate food that is easy to prepare, ready to eat or available there and then.

They are more likely to choose food based on the fact that they needed something to eat at that moment (46%, compared to 30% amongst the other consumers).

This group contains the highest proportion of low consumers of fruit (39%, compared to 33% of the others) and vegetables (36%, compared to 27% of the others).

Convenience-oriented consumers represent a particularly large group in the Czech Republic but are also over-represented in Slovakia and Sweden.

Since this is the group that consumes the least fruit and vegetables, it is especially important to find ways to reach out to them. Even though fruit being inherently convenient, the previous report found that fruit has failed to get on the snacking bandwagon, suggesting that companies that make smoothies, protein bars and small, expensive packets of nuts are the ones that have managed to capitalise on the snacking trend. Convenience-oriented consumers are a crucial audience to target due to their low consumption of vegetables too.

Health-oriented

Health-oriented people place particular value on cooking and eating food that is healthy. They also choose healthy options when shopping.

This group comes out on top in terms of eating lots of fruit (40%, compared to 31% amongst the other consumers) and vegetables (43%, compared to 31% of the others).

It is more common for health-oriented consumers to eat lunch containing vegetables (57%, compared to 46% of the others).

This group also responds more positively to government efforts to influence the way people eat, especially if it involves getting people to eat more healthily (46%, compared to 28% of the others).

Health-oriented consumers are particularly common in Belgium and France.

The image above shows what criteria health-oriented consumers say they consider in ensuring that food is healthy.

Different messages need to be used to target health-oriented consumers. We go into a little more detail on this a few paragraphs further on in this report, under the heading "Health-oriented people are not all LOHAS".

Socially-oriented

Socially-oriented people place greater value in eating together with family and friends.

This group is more likely than the others to think their life is meaningful (55%, compared to 41% amongst the other consumers).

It is more important to them than to other consumers that the food they eat has been prepared with care (58%, compared to 44% of the others).

Socially-oriented consumers care more than others about the food they eat tasting good (70%, compared to 62% of the others).

Denmark stands out as the country with the largest socially-oriented consumer group.

The image above shows what socially-oriented consumers give as reasons why it is important and more enjoyable to eat with others.

The socially-oriented consumer group is ripe for expansion – because it is doing better than other groups on average. There is also some self-help potential here.

HOW CAN THE FRESH PRODUCE INDUSTRY HELP ENSURE THAT FOOD IS COOKED WITH CARE AND PEOPLE SOCIALISE MORE?

Playful-oriented

Fun-oriented consumers place more importance on enjoying cooking and eating food or shopping for ingredients.

This fun-loving group also tended to take more pleasure than others in cooking (48%, compared to 28% amongst the other consumers) and shopping (38%, compared to 23% of the others).

They see themselves as "foodies" (30%, compared to 15% of the others) and think they can cook better than most (28%, compared to 14% of the others).

Fun-oriented consumers say they always have something good to eat in the fridge (38%, compared to 25% of the others).

They always like to eat, no matter what it is they are eating (34%, compared to 22% of the others).

They get inspiration for cooking while shopping (54%, compared to 42% of the others).

The fun-oriented consumer group is particularly large in Poland, Germany and Austria.

The image below shows the qualities that fun-oriented consumers describe when asked when they last enjoyed cooking or eating food, what that food was and why was it fun. It seems that cooking and eating are often a fun experience in these households because many respondents mentioned that they enjoyed doing this just the day before.

Sustainability-oriented

Those who prioritise sustainability care about food being sustainably produced.

Sustainability-oriented consumers are more likely than others to try new food (17%, compared to 9% amongst the other consumers) and ate something they had never eaten before for dinner yesterday.

They are also more likely to choose premium option (34%, compared to 20% of the others) when shopping.

Sustainability-oriented consumers chose their latest purchases partly because they wanted something a little bit luxurious (33%, compared to 22% of the others).

They are more likely than others to feel guilty about their food choices (17%, compared to 10% of the others).

They want to eat more fruit and berries (45%, compared to 37% of the others) and vegetables (46%, compared to 38% of the others).

Sustainability-oriented consumers are particularly common in Poland and Austria.

The image below shows what the sustainability-oriented consumers do to ensure that the food they buy, cook and eat is sustainable.

What are the consumer groups’ favourite products?

The table below sets out which foods the different consumer groups like best and what is over-represented for each group. The most over-represented item for each consumer group is shown at the top. Those in brackets are over-represented, but to a lesser extent.

In the case of berries, it is therefore clear that the most common berries such as raspberries and strawberries are relatively well-distributed amongst the various consumer groups and are therefore evenly spread rather than over-represented.
In terms of fruit, however, there are also common favourites such as bananas and apples which are clearly a little more popular within certain consumer groups.

	Economically-oriented	Convenience-oriented	Health-oriented	Socially-oriented	Playful-oriented	Sustainability-oriented
Vegetable	cauliflower	- cucumber - carrot	- beetroot - zucchini	- cauliflower - beetroot	- cauliflower - celery	- beetroot - zucchini
Fruit	- banana - tangerine	- apple - banana	- plum - apple	- apple - pear	- apple - the plum - mango	- plum - pear
Berry	- cherry - red currants	(Niche berries such as goji, chokeberry, mulberry are slightly overrepresented)	- blackberries - black currants	(gooseberries)	- blueberries - blackberry	blackberry
Protein sources	bird	bird	- fish - legumes	- fish - meat	- fish - poultry	- legumes - plant based meat substitutes
Carbohydrate	pasta	(rice)	- rice - groats	potatoes	- rice - potatoes	- rice - potatoes
High fat	- cheese - cream	(cream)	- nuts - oil	butter	- oil - butter	- nuts - oil

How do we reach these consumer groups?

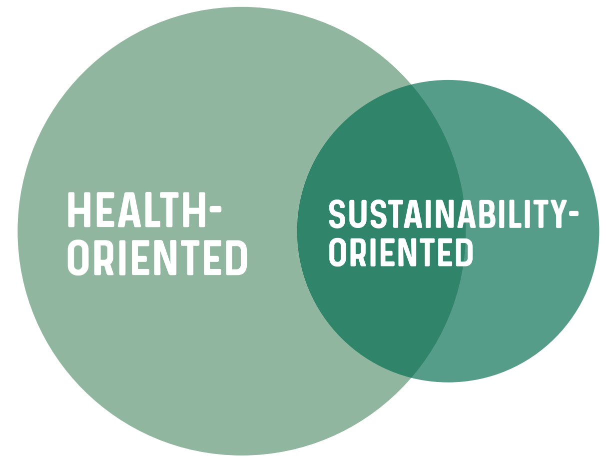
Based on our research into these six consumer groups, a natural conclusion to be drawn is that we need to understand them first, then appeal to them and offer them something that suits their requirements.

If we look at successful categories in the consumer market as a whole, supplements and beauty products are two examples. Although many people find these product types regrettable or problematic, it is worth understanding and analysing them in more depth. Food and meals are related to these phenomena.

On group of particular interest, of course, is young people. When we talked to anthropologist Katarina Graffman, she said that many adults have been quick to describe the younger generation as “Generation Greta” based on the assumption that large swathes of young people look up to Greta Thunberg and her activities to support the climate. Now, however, Greta is not the only one whose influence has been recognised by Time magazine in naming its Person of the Year: Taylor Swift falls into this category too. Katarina suggested that we ought to use terms like “Generation Kardashian” to refer to a generation that spends a lot of money on things other than sustainability, such as appearance and beauty products, or even cosmetic procedures such as fillers and more advanced cosmetic surgery. Taylor Swift’s fans have now also been given their own epithet – “Swifties”, like Justin Bieber’s “Beliebers”.

We need to ask ourselves these questions:

“How can the fresh produce industry reach out to Swifties and the gym culture generation?” and “How can the industry target that influential group in Silicon Valley that wanted Mark Zuckerberg and Elon Musk to fight it out in a cage match?”



Health-oriented people are not all LOHAS

One important insight to mention when we look at the consumer groups is that the health-oriented consumers and LOHAS are not necessarily the same group.

Health is also a very common concern amongst those who prioritise sustainability: 73% of those who particularly value sustainability also believe health is very important. However, the reverse is not true. Amongst highly health-conscious consumers, only 38% place a high priority on sustainability too. The health-oriented group prioritises all the other key consumer criteria more. In other words, sustainability is the smallest group of the other five even within the health-oriented category.

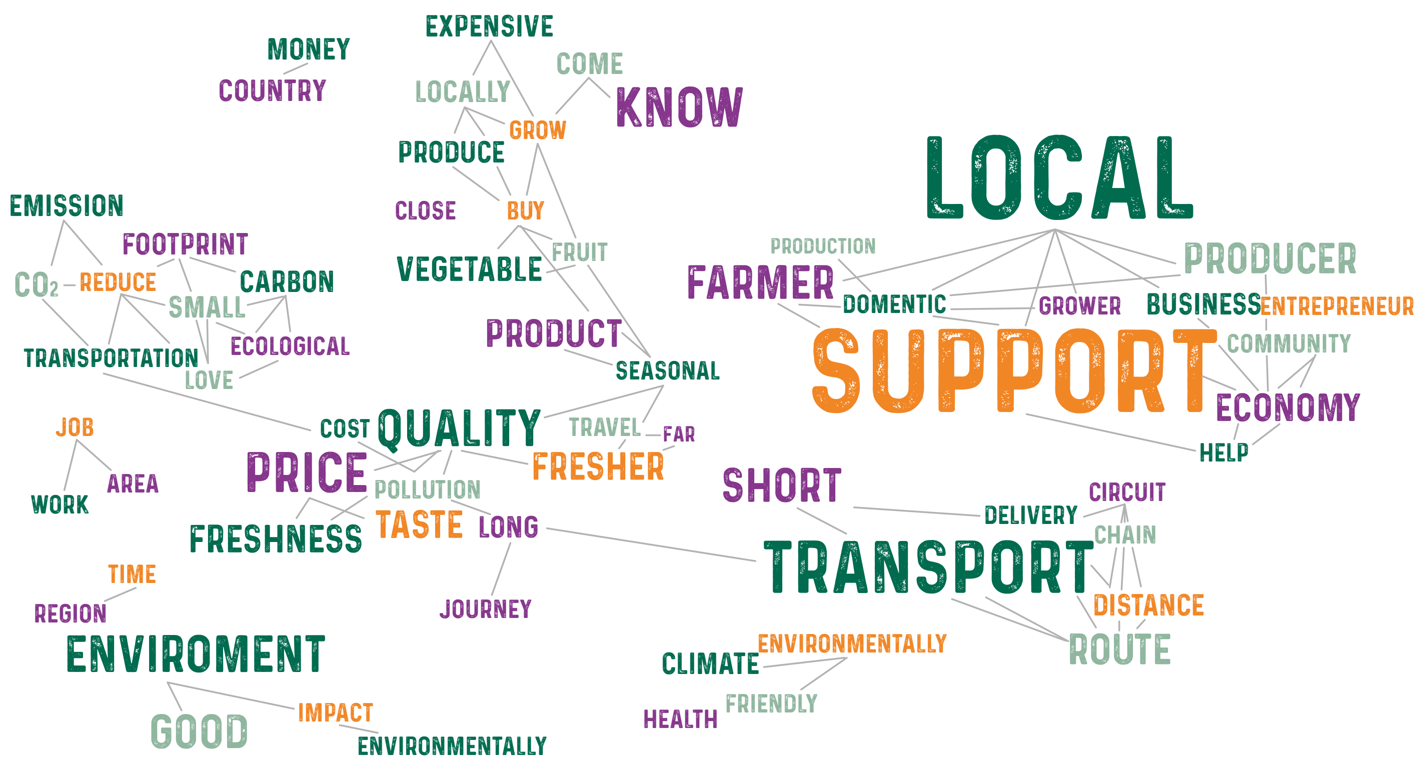
There is an urgent need to reach out to health-oriented people who do not belong to the LOHAS group.

Locally produced for flavour, the climate and the local community

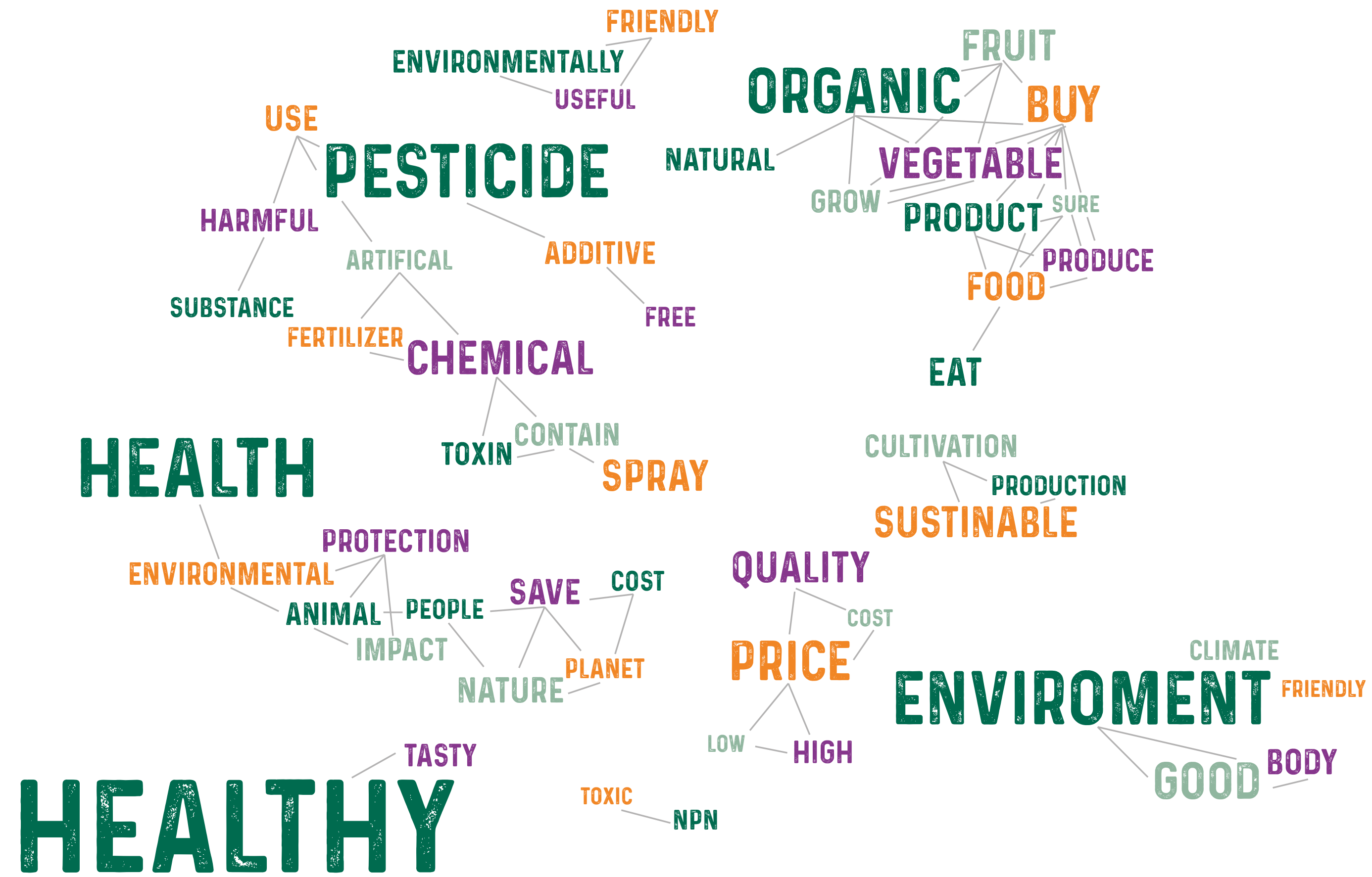
In a previous fresh produce survey in 2021, we asked consumers which aspects of sustainability they considered most important. Against issues such as climate, biodiversity, water consumption, environment friendliness and working conditions, the concept of local came out on top.

Locally produced was the sustainability aspect prioritised by consumers. In terms of which sustainability issues should be address in which forums, opinions varied and consumers did not think this was necessarily particularly important. In any case, in stores, consumers find it difficult to figure out what items have a low level of water consumption or how goods contribute to biodiversity. To gain a better understanding of two of the most widely discussed sustainability factors in consumer sales – i.e. the ecological and local aspects – we have explored these in more depth.

We asked half of our respondents an open-ended question about the pros and cons they see in buying locally produced fruit and vegetables. The other half of the respondents were asked the same question, but directed towards organic alternatives.



*Common words in the free text responses describing benefits of buying **locally produced items**.*
Large words are more common in responses than small ones and linked words often occur together.



*Common words in the free text responses describing benefits of buying **organic products.***
Large words are more common in responses than small ones and linked words often occur together.

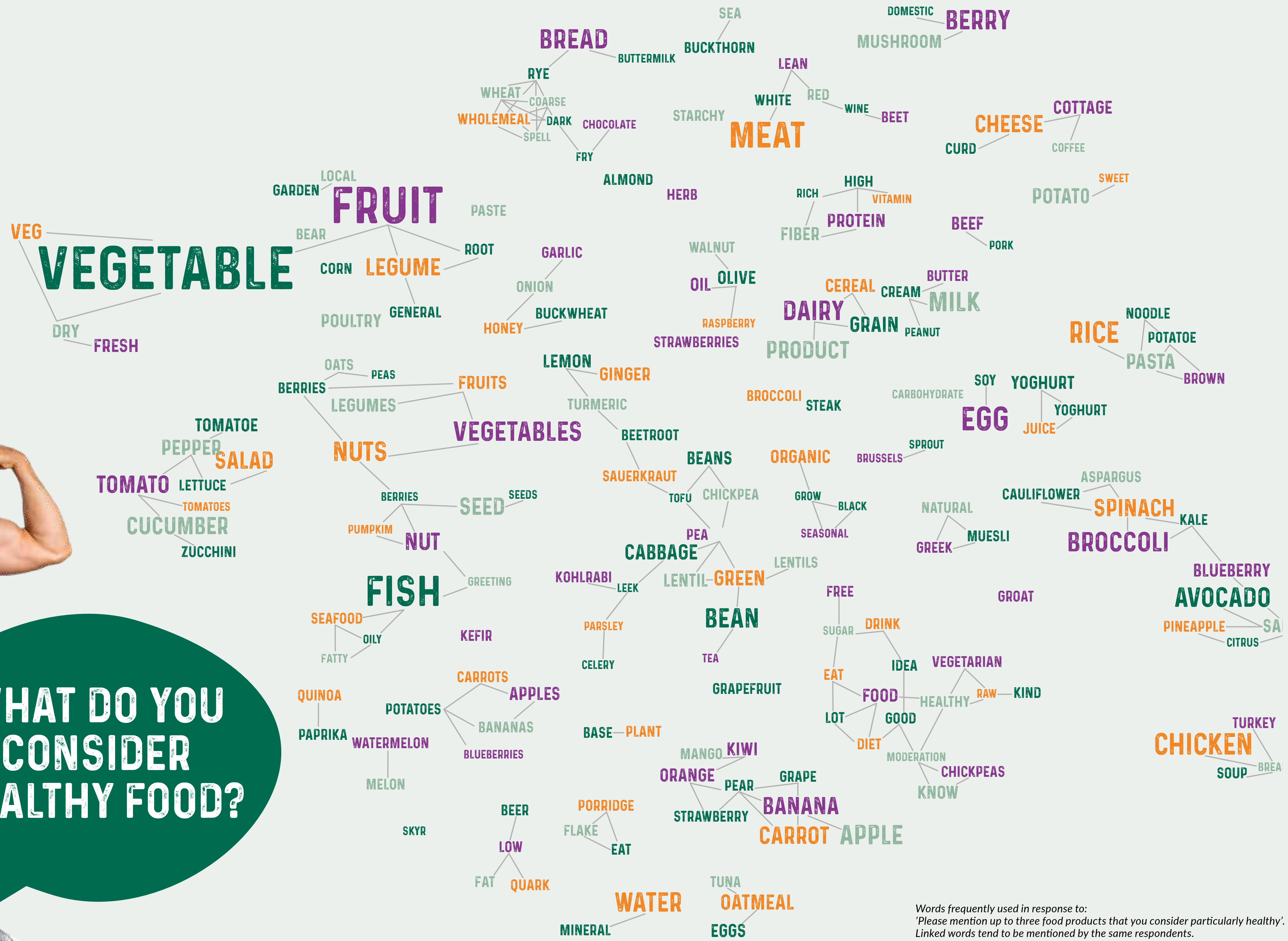
It turns out that, as far as the surveyed consumers are concerned, there are at least three different factors behind the decision to buy locally produced fruit and vegetables.
The local community is an important motivator – they want to support farmers and other entrepreneurs in the area and benefit the local economy. Another major theme in the responses is the desire to avoid unnecessary transport and thus reduce greenhouse gas emissions that are harmful to the climate. A third aspect, which ties in with that of avoiding long transport, is that locally produced goods can be fresher and of a higher quality, because there is less time between harvesting them and making them available to buy.

The benefits that the respondents saw in organic products are that they are good both for their own health and that of their families and for the environment – in both cases because organic farming uses less pesticides than conventional cultivation methods. The benefits of both locally produced and organic products therefore partly relate to environmental sustainability, but while buying local is linked to climate issues, buying organic is more about not wanting toxins to spread in nature. When we asked about the disadvantages of choosing locally produced and organic products instead, the answers were all very similar: they are expensive.

In other words, despite the fact that local and ecological aspects are often mentioned in similar contexts, there are quite a few differences in opinion on the benefits of both.

Everyone agrees – fruit and vegetables are good for you

The health match has already been won. When consumers in the surveyed countries were asked for their views on health, both fruit and vegetables were deemed to be good for you. Below is a cluster diagram showing which foods the respondents see as particularly healthy. Answers that are close together are those often mentioned by the same person. Although various diets and theories about what is healthy to eat are constantly evolving and being debated, the image of fruit and vegetables as the most healthy choice remains intact.



Words frequently used in response to:
'Please mention up to three food products that you consider particularly healthy'.
Linked words tend to be mentioned by the same respondents.

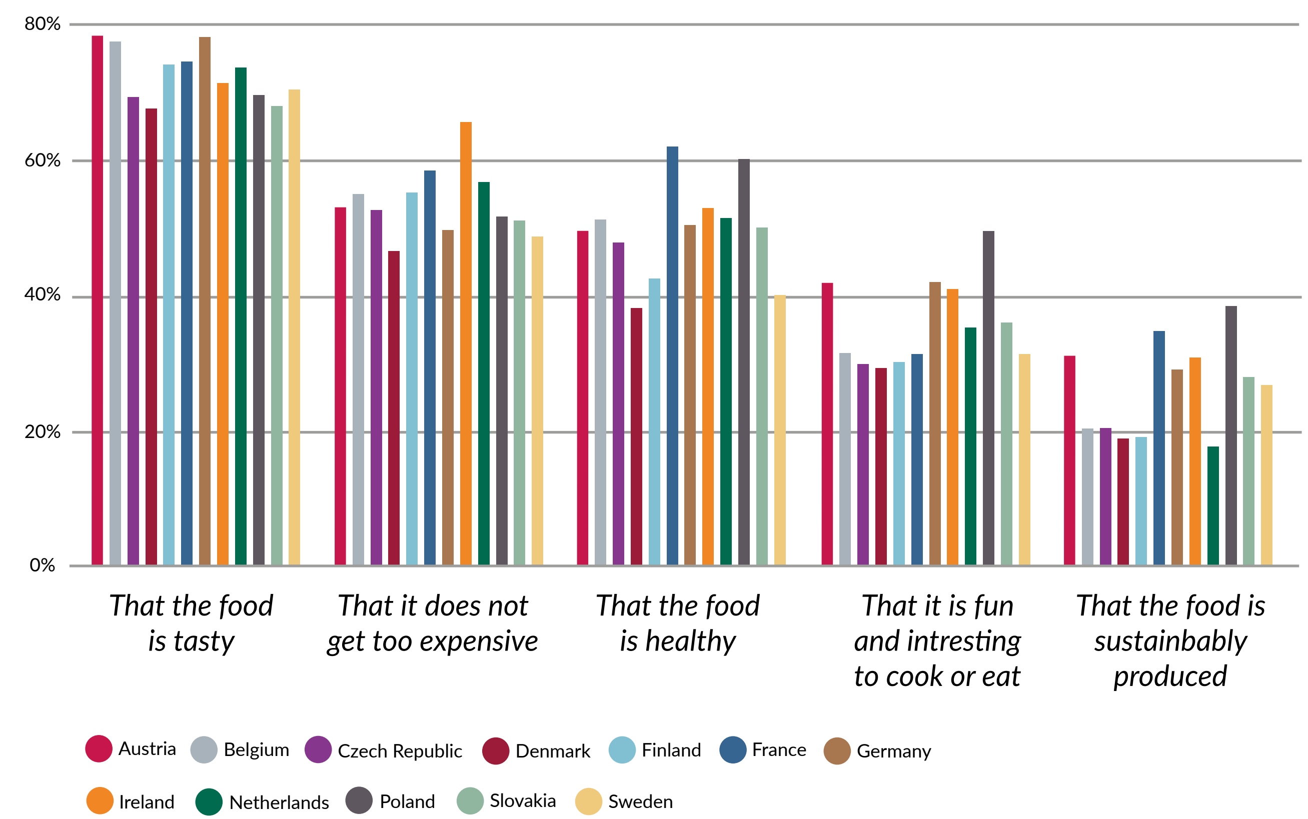
TASTE WINS

In all countries surveyed, taste is what matters most to those who buy, cook or eat food. This is reason enough to be wary of appealing to consumers solely on the basis of price, health or sustainability. This may come as a bit of a surprise to some, but taste is especially important to those who eat a lot of fruit and vegetables. One theory is that those who eat less fruit and vegetables are less interested in food in general and not inclined to think about their food consumption as much. For those people who have a little more time, energy, interest and financial resources, vegetables and fruit are more important. Is it possible to combine this idea with Jordan B. Peterson's "12 Rules for Life", with something along the lines of "get a haircut, get a job, make the bed and live your life to the full"? A good start would be to eat well and take care of your body.

Taste, of course, is also a tricky issue. Cindy van Rijswick from Rabobank mentioned that consumption of Brussels sprouts is now on the rise. For a number of years, oven-roasted Brussels sprouts have also been very popular amongst trendy New Yorkers. With a little olive oil, lemon zest and parmesan like Jamie Oliver, or balsamic vinegar and honey, or even in full New York Style with walnuts, bacon and honey. If honey spiked with chilli is currently on trend, someone might even dare to try that out too, though it remains to be seen how it would turn out.

This is very much the opposite of traditional cooking meth-ods, where the vegetables were boiled to the point where all the nutrients and flavour were lost. Some chef have summed up the new cuisine of our modern age in two points: shorter cooking times and more vegetables.

In general, how important are the following factors when you purchase, prepare, or consume food?



Final note

"All communication takes place on the recipient's terms" is an expression sometimes used by marketers and communicators. There is a lot of truth in this, because a message that is not received by the recipient does not fulfil any particular purpose for the sender either.

Although it is not as obvious in sales, there is a parallel here. It is the purchase that determines whether the seller succeeds. The fresh produce industry needs to understand its consumers and what drives sales in order to achieve success.

This report shows that there is a need for this. Consumers and their context need to be understood. In addition, there is often a difference between what they say, what their status and ideals are –and what they actually do. Consumers also vary widely, both amongst themselves and in the sense that they take on different personas at different times. It is easy to get carried away by overarching trends and believe that everything is driven by price and convenience – or that success can only be achieved if consumers are persuaded to eat vegetables because they are healthy and cheap enough.

In fact, motivators of food consumption cover the full spectrum from scarcity of resources right through to the need for enjoyment and entertainment. Even in gloomy times, people want to enjoy life and see glimmers of light in their everyday existence. They crave a little recognition and nostalgia, like the launch of a Happy Meal for adults, a little everyday luxury. Economists talk about funflation[26], the idea that consumers are sure to consume what they think is fun, despite inflation.

This report also reveals a lack of goals and purpose amongst consumers. Funflation can be an expression of escapism, a chance to get away from a challenging world and everyday life. If the fresh produce industry can help make the world a better place, right now that could be mainly by making sure that people hang out and eat good food together and find their way back to themselves and each other, instead of escaping reality. After all, what could be more nostalgic and reassuring than enjoying an old – or new – favourite dish in good company?

Sources

[1] A text and video communication tool widely used in connection with gaming
[2] A luxury fashion brand
[3] "Goblin mode" was named word of the year for 2022 by the Oxford English Dictionary
[4] One example which sheds light on some of these friends can be found here: https://www.axios.com/2023/12/01/food-trends-2024-dining-buckwheat-coffee-halloumi-pickles-tiktok
[5] Central was named top of the World's 50 Best Restaurants ranking in 2023
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[25] https://en.wikipedia.org/wiki/LOHAS
[26] https://news.yahoo.com/funflation-does-taylor-swift-152640185.html

In addition to these sources and the many wise and pleasant people mentioned in the report, of course a large team and many reconnaissances and discussions have formed the basis of the Consumer Compass reports we have produced over the years. Thank you to everyone who contributed!

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Thank you!