

Bienvenue

Le webinaire commence à 13h30



« *Pouvoir d'achat des ménages :
Comprendre et appréhender les évolutions actuelles* »

Focus sur l'alimentation

Orateurs :

- Brigitte Grisar, chargée de projets, Concertation Aide Alimentaire, Fédération des services sociaux
- Jonathan Peuch, chargé de recherche et de plaidoyer à Fian Belgium
- Wim Van Edom, économiste à Comeos



23/05/22

Focus sur l'eau



13h30-15h

Isabelle Dykmans, SWDE et Cédric Prevedello, Aquawal

Pouvoir d'achat des ménages

Focus sur l'alimentation

Wim Van Edom | Observatoire du Crédit et de
l'Endettement

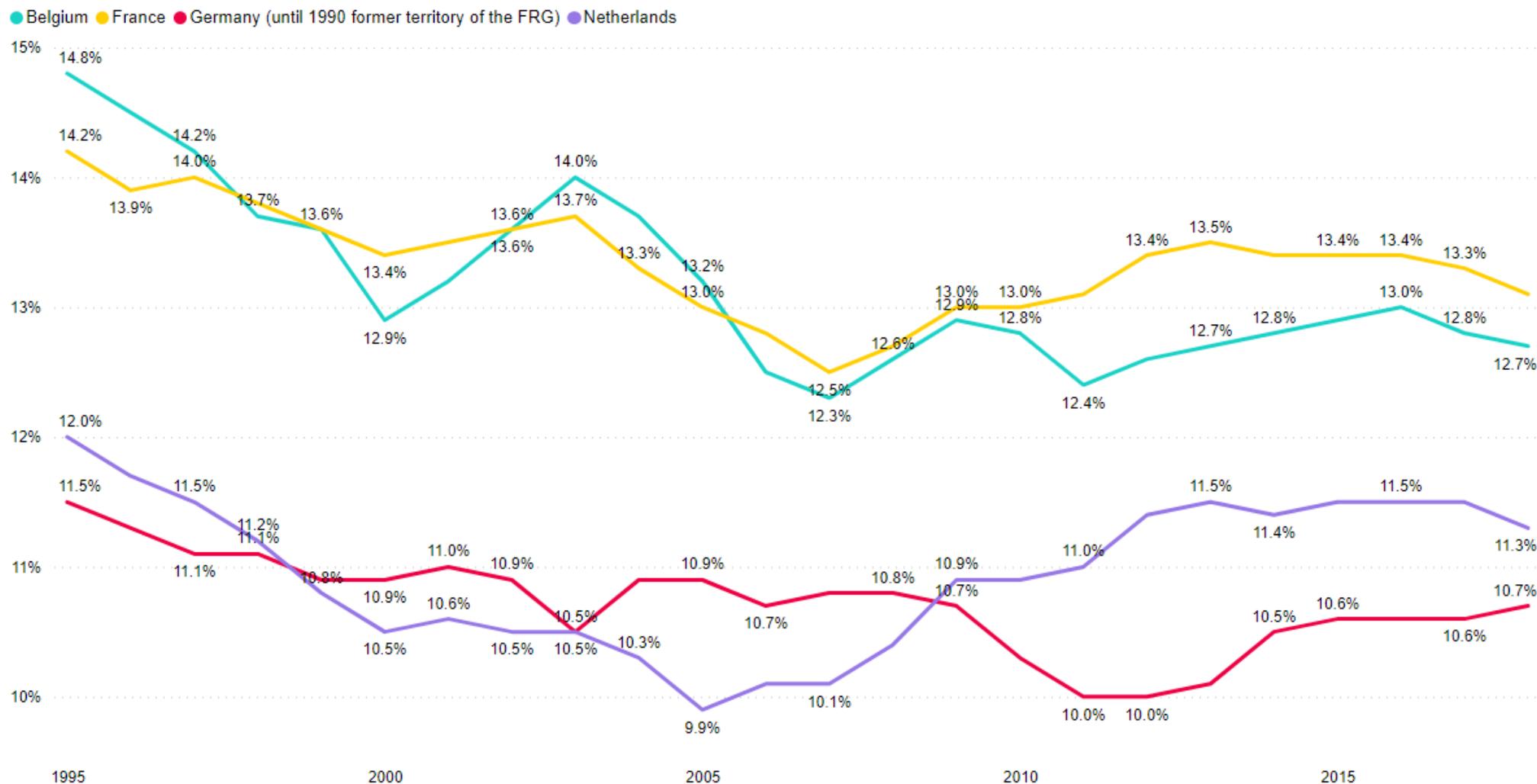
comeos



for commerce
and services

Household consumption

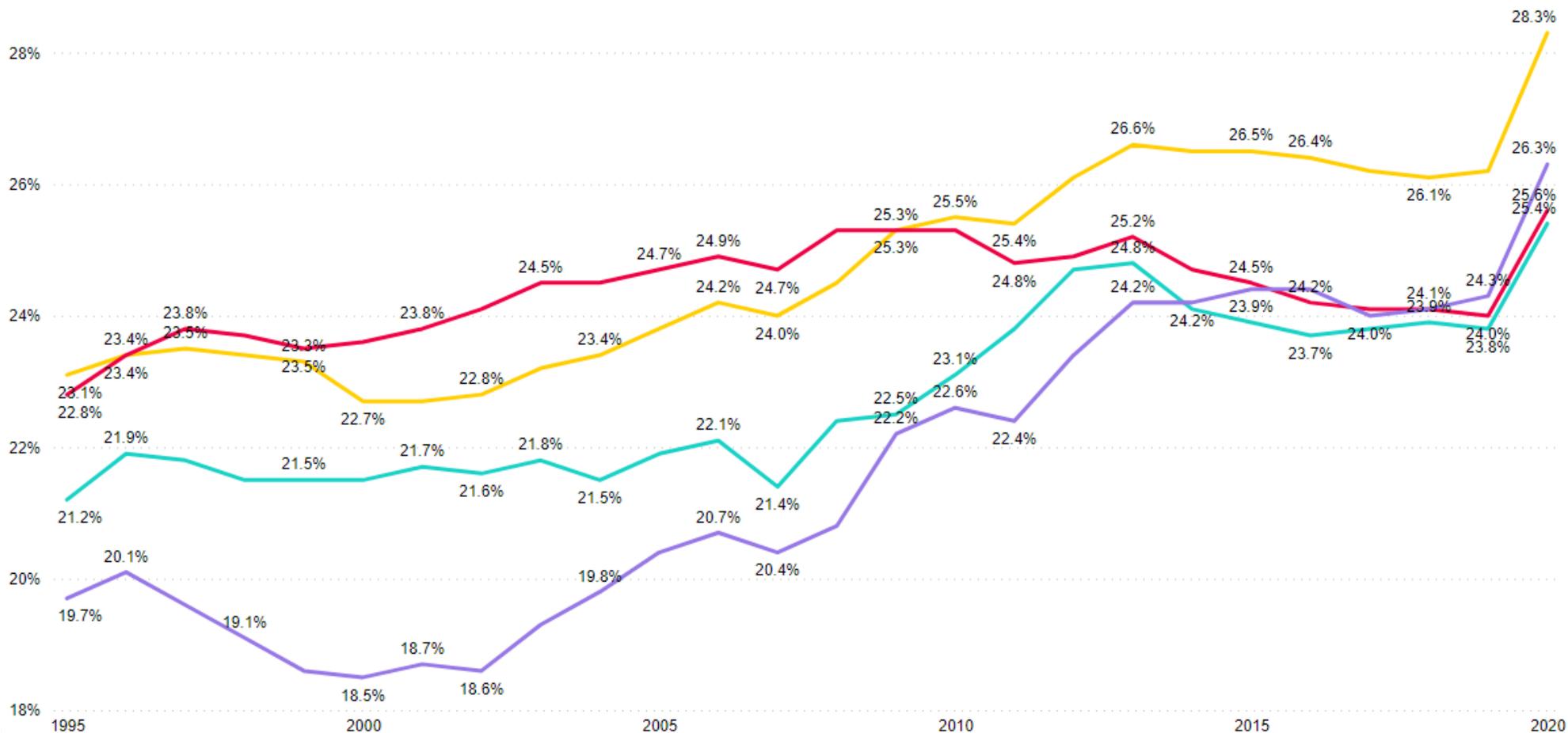
% Food & non-alcoholic beverages



Household consumption

% Housing, water, electricity, gas and other fuels

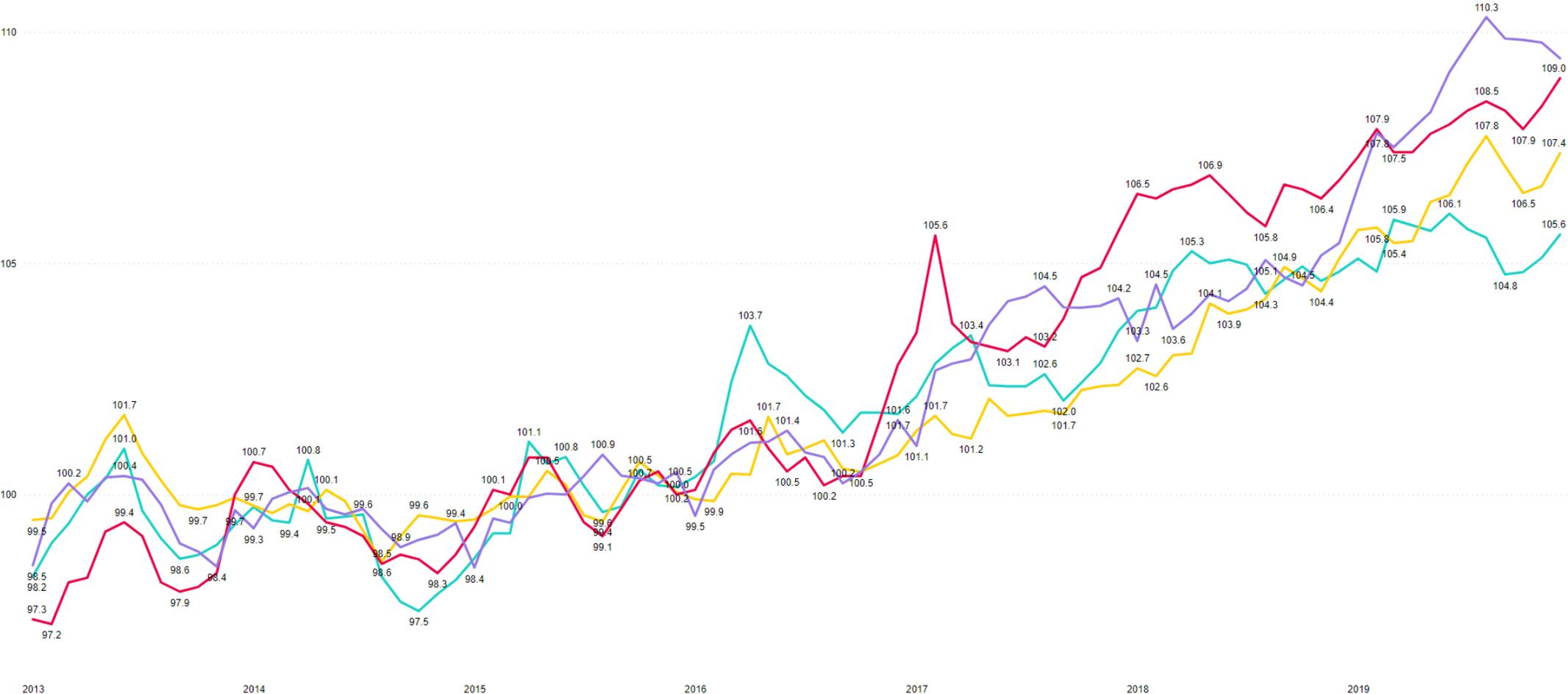
● Belgium ● France ● Germany (until 1990 former territory of the FRG) ● Netherlands



Indice des prix

Alimentation

● Belgium ● France ● Germany (until 1990 former territory of the FRG) ● Netherlands

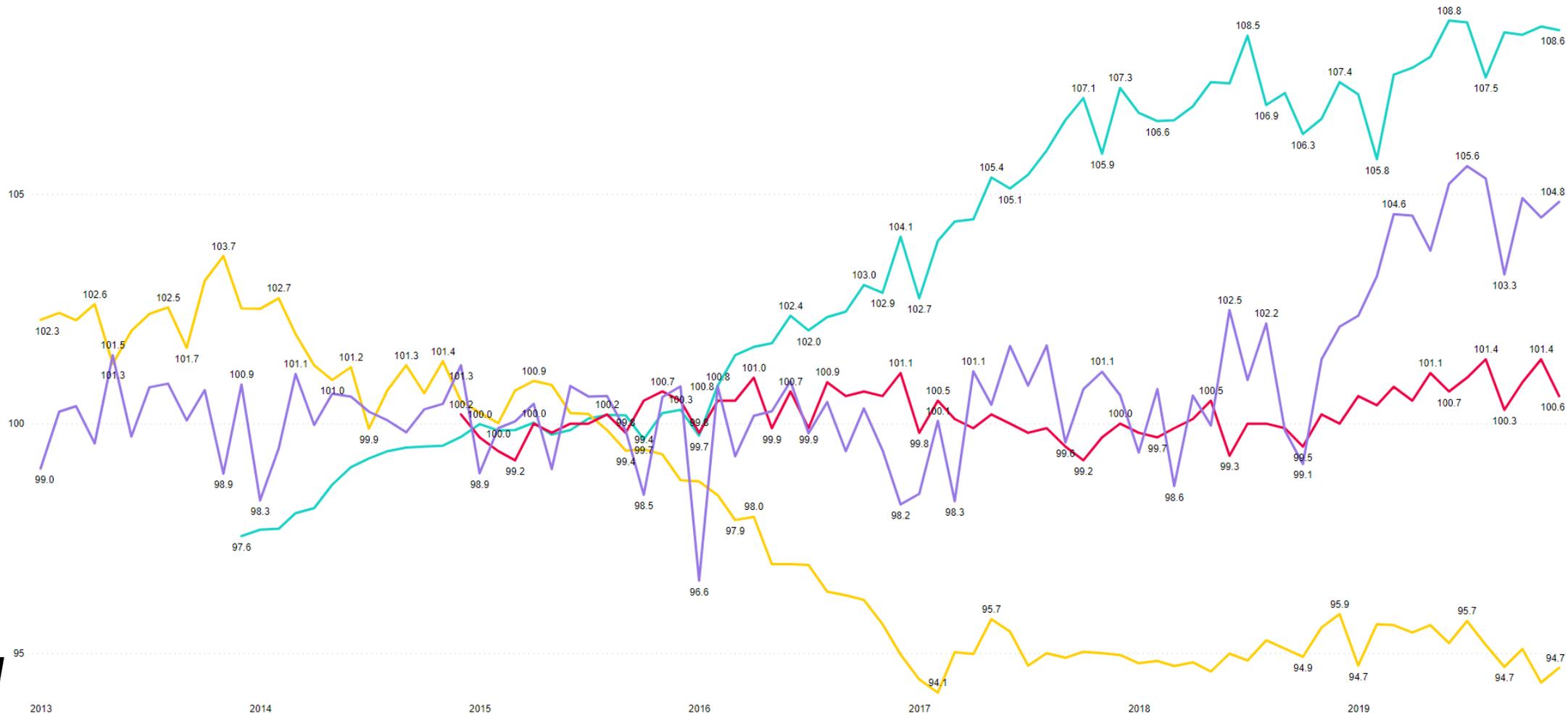


Indice des prix

Repas Préparés

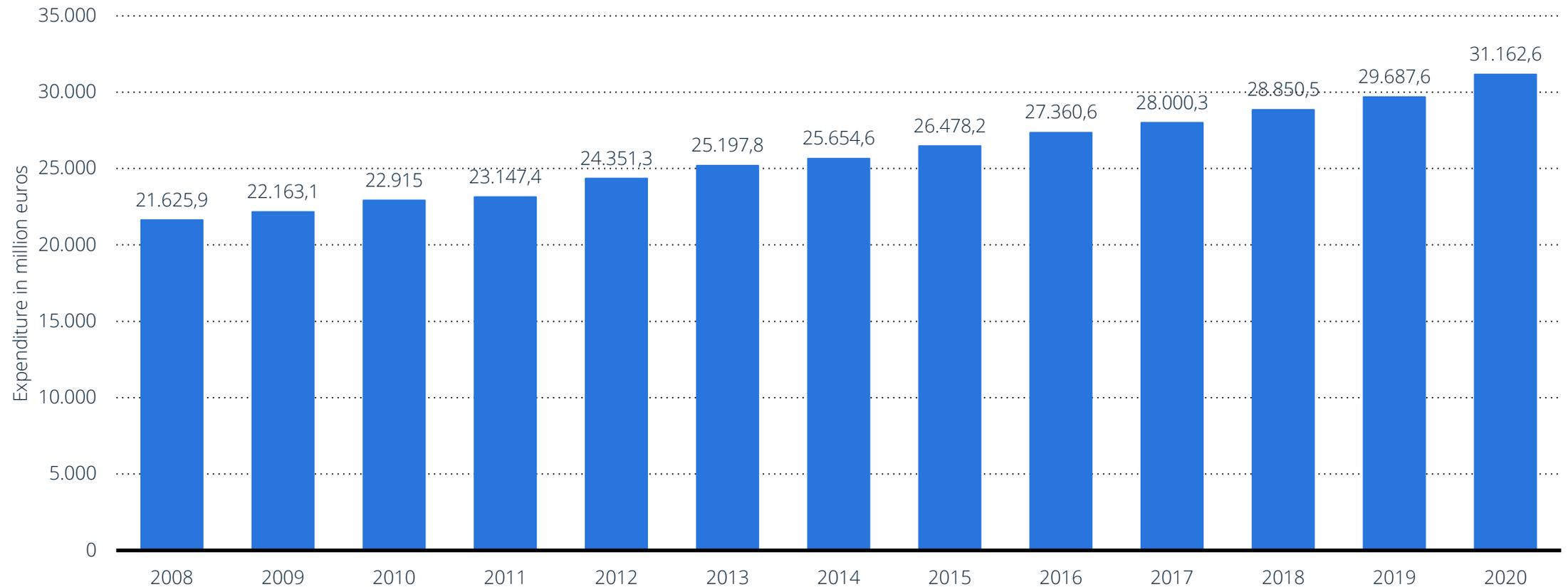
● Belgium ● France ● Germany (until 1990 former territory of the FRG) ● Netherlands

110



Consumer expenditure of households on food and non-alcoholic beverages in Belgium from 2008 to 2020 (in million euros)

Consumer expenditure on food and non-alcoholic beverages in Belgium 2020

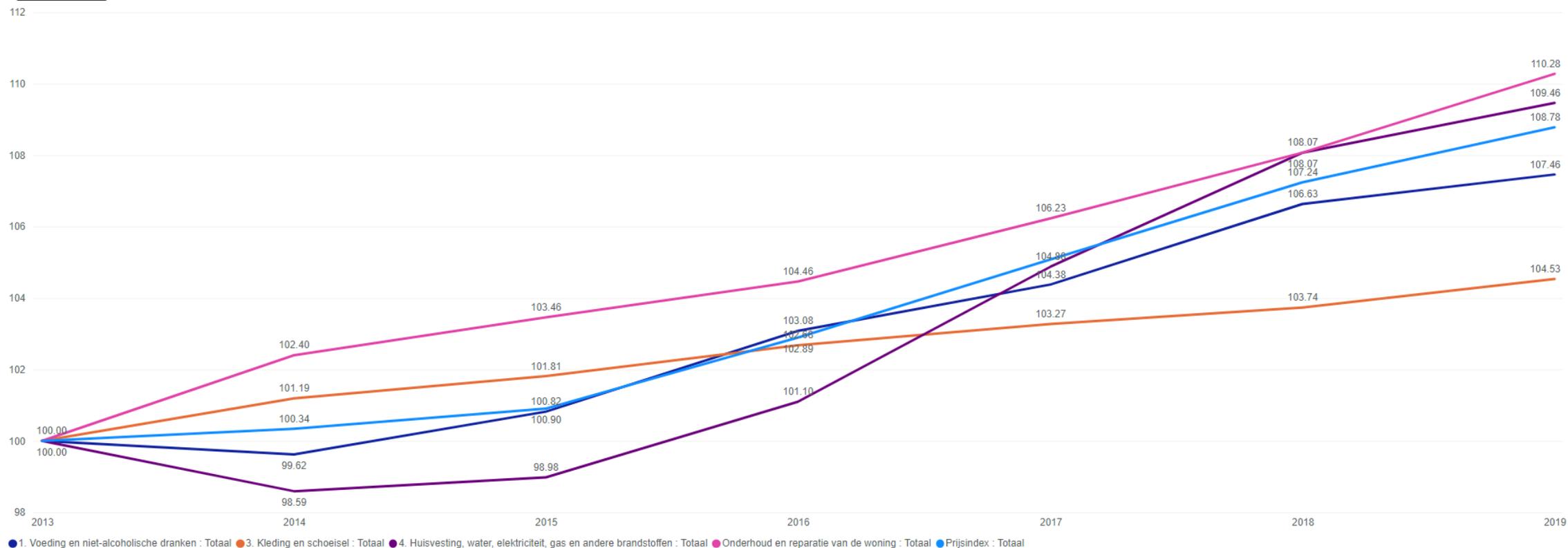


L'indice des prix

Quelques chiffres clés

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Corona & guerre en Ukraine

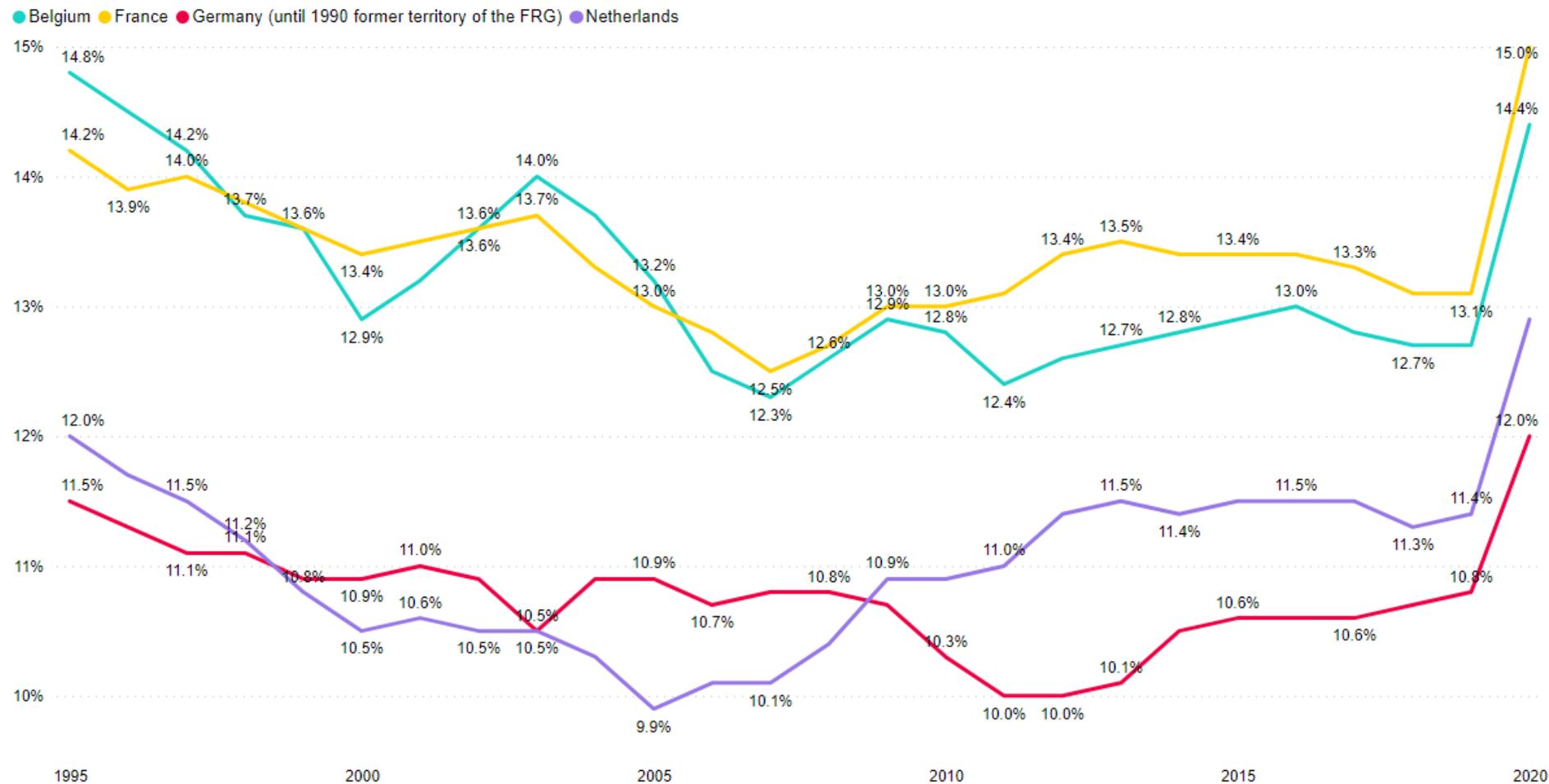
Effets Catalyseurs

- Budget
- Santé
- Prix

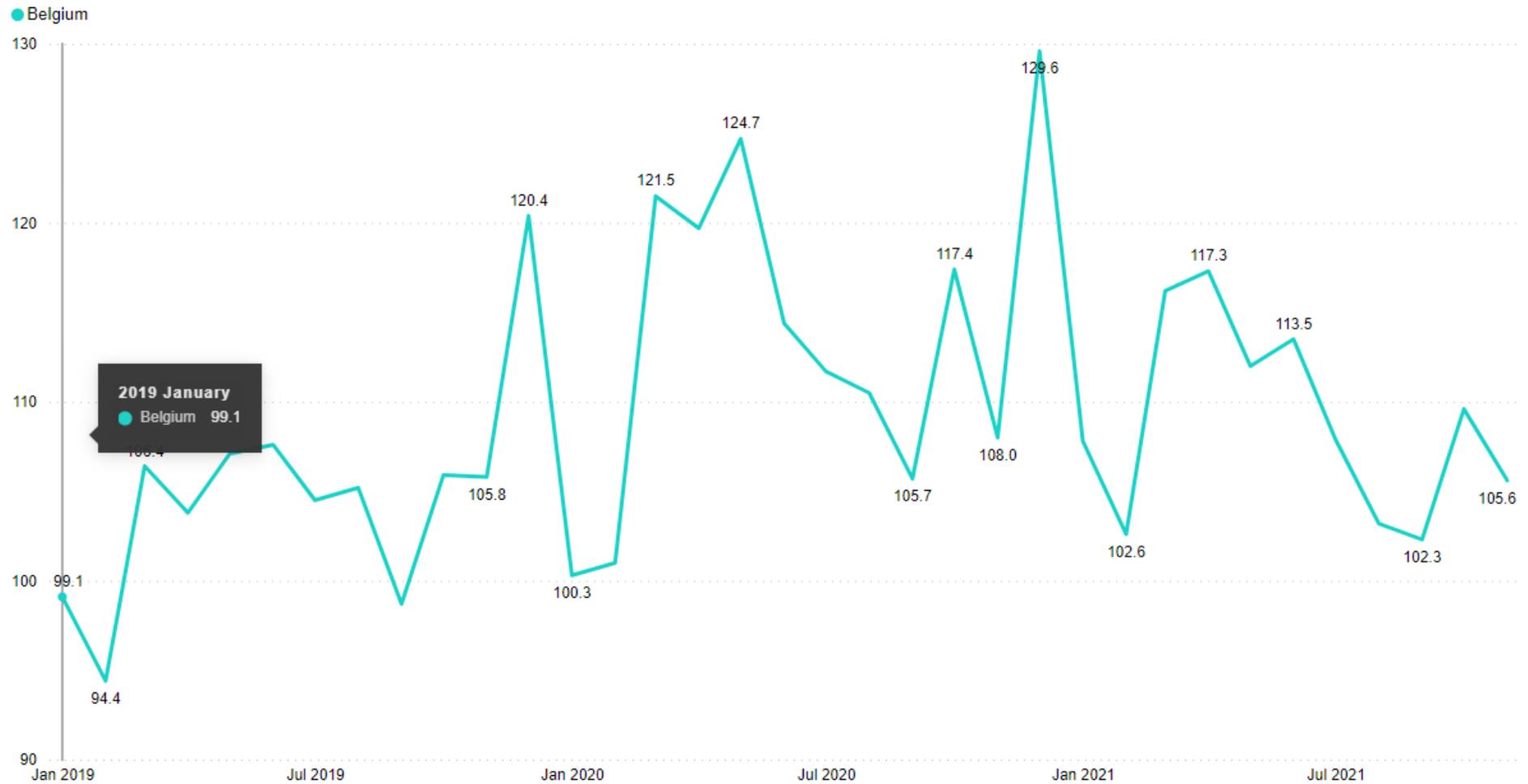


Household consumption

% Food & non-alcoholic beverages



Retail sales in non-specialised stores with food, beverages or tobacco predominantly sold

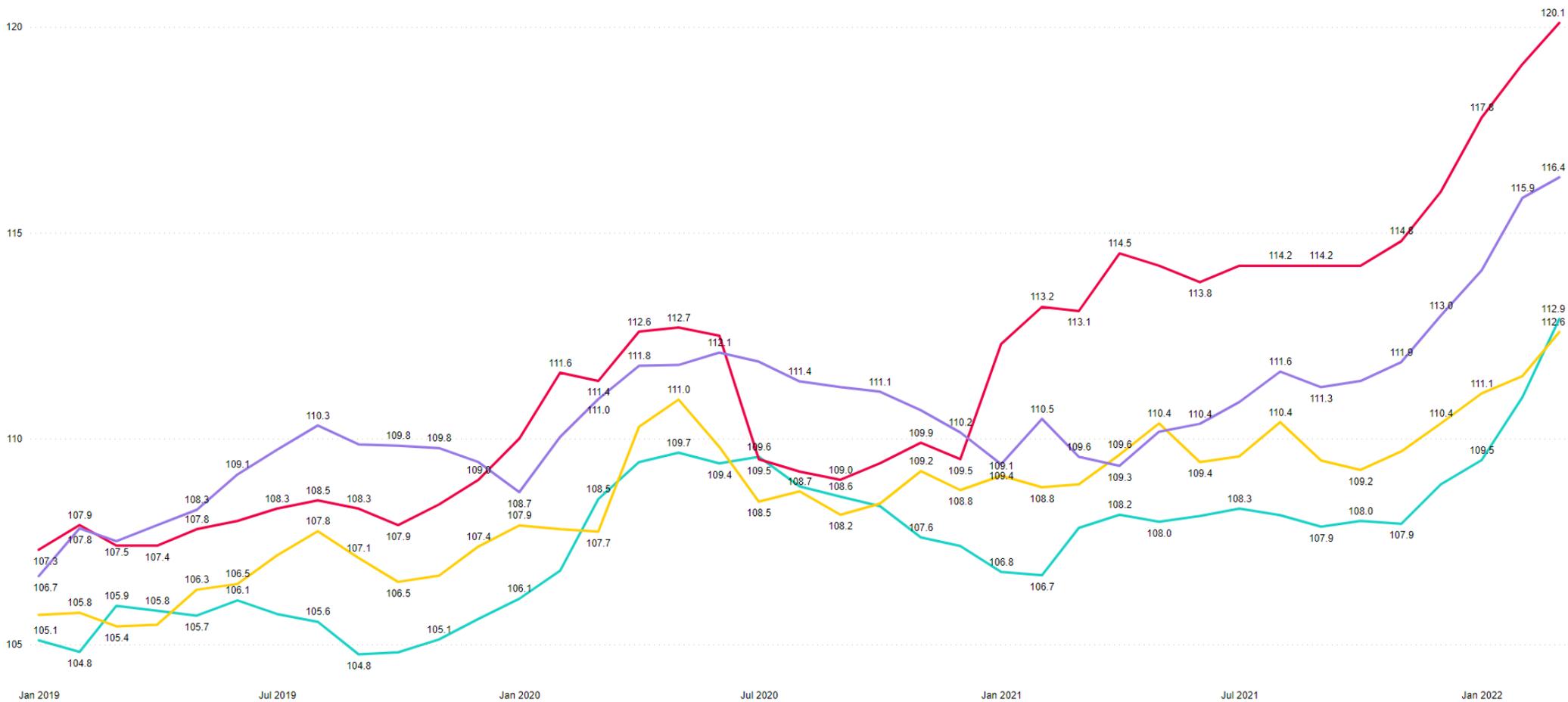


L'indice des prix

Alimentation

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● Belgium ● France ● Germany (until 1990 former territory of the FRG) ● Netherlands



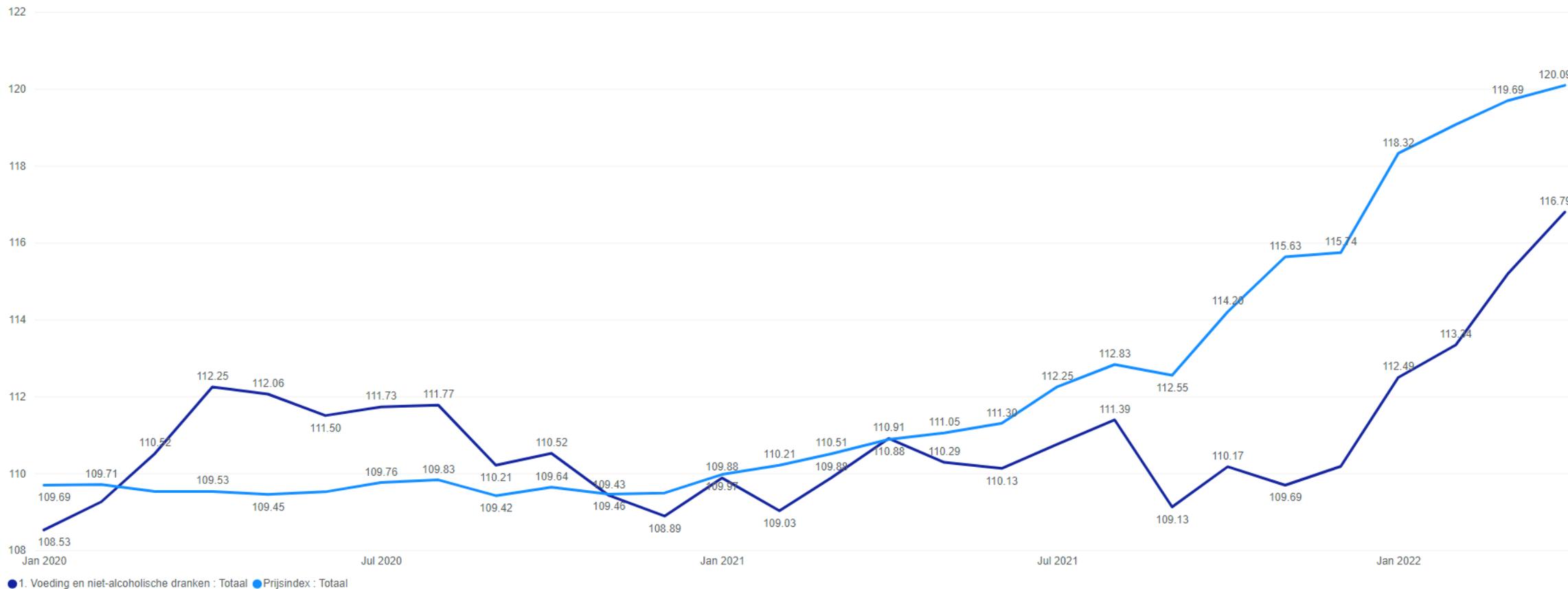
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Alimentation et boissons non alcoolisées



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PRIJSINDEX : TOTAAL, 1. VOEDING EN NIET-ALCOHOLISCHE DRANKEN : TOTAAL



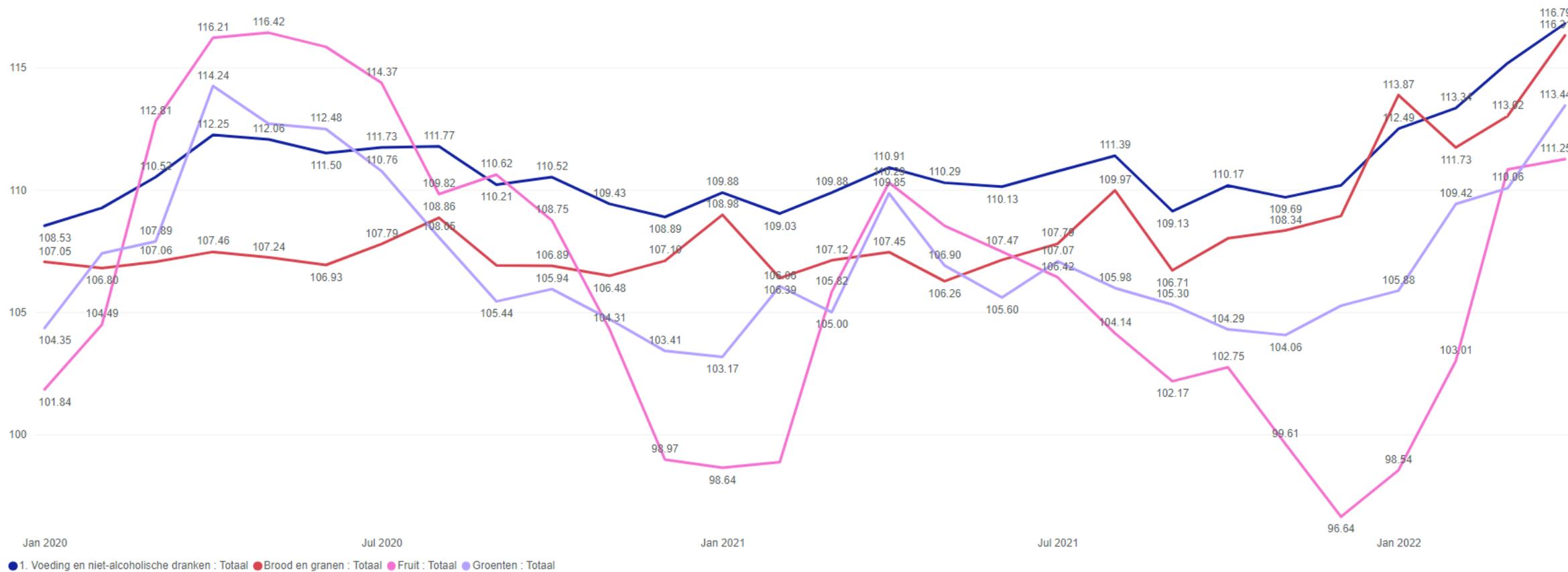
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Alimentation et boissons non alcoolisées



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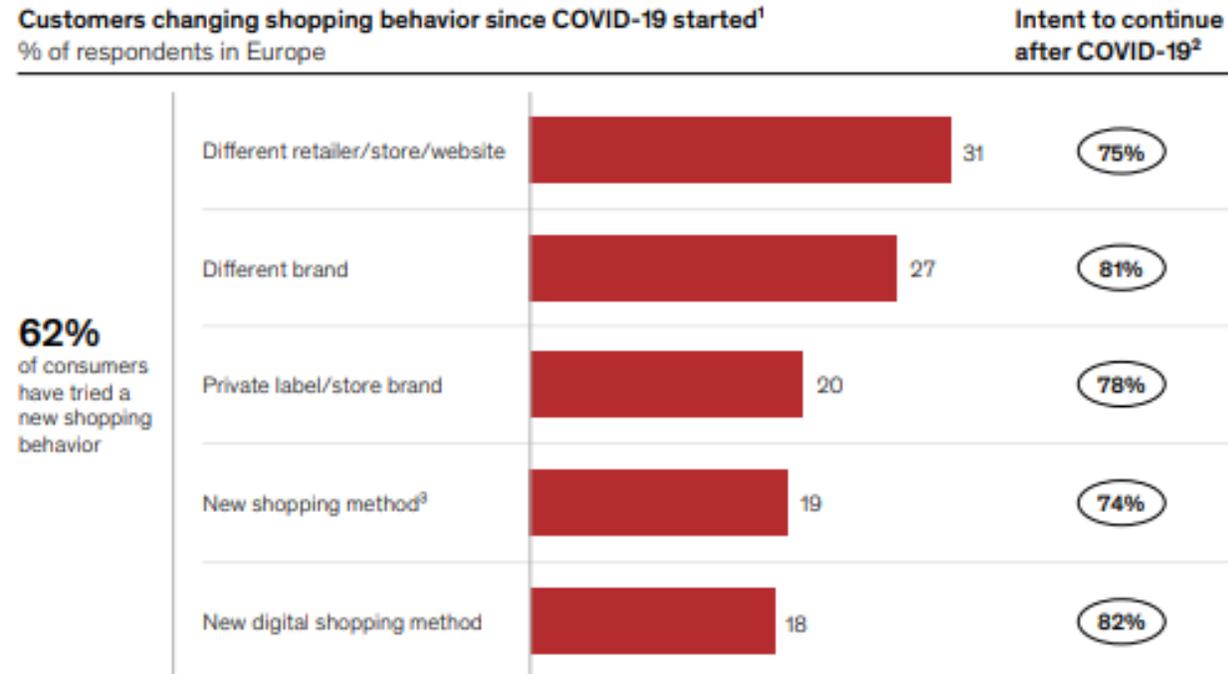
1. VOEDING EN NIET-ALCOHOLISCHE DRANKEN : TOTAAL, GROENTEN : TOTAAL, FRUIT : TOT...



Nouveau comportement des consommateurs

d'autres magasins et d'autres canaux

More than 60 percent of Europeans have tried a new shopping behavior, and most intend to continue with it beyond the crisis.



¹ Q: Since the coronavirus (COVID-19) situation started, which of the following have you done? 38% of consumers selected "none of these."

² Q: Do you plan to continue with these shopping changes once the coronavirus (COVID-19) situation has subsided?

³ Methods include curbside pickup and delivery apps.

Source: McKinsey & Company COVID-19 Europe Consumer Pulse Survey 11/9-11/15/2020, n = 5,232 (Italy, France, Germany, Spain, UK) sampled and weighted to match European general population 18+ years

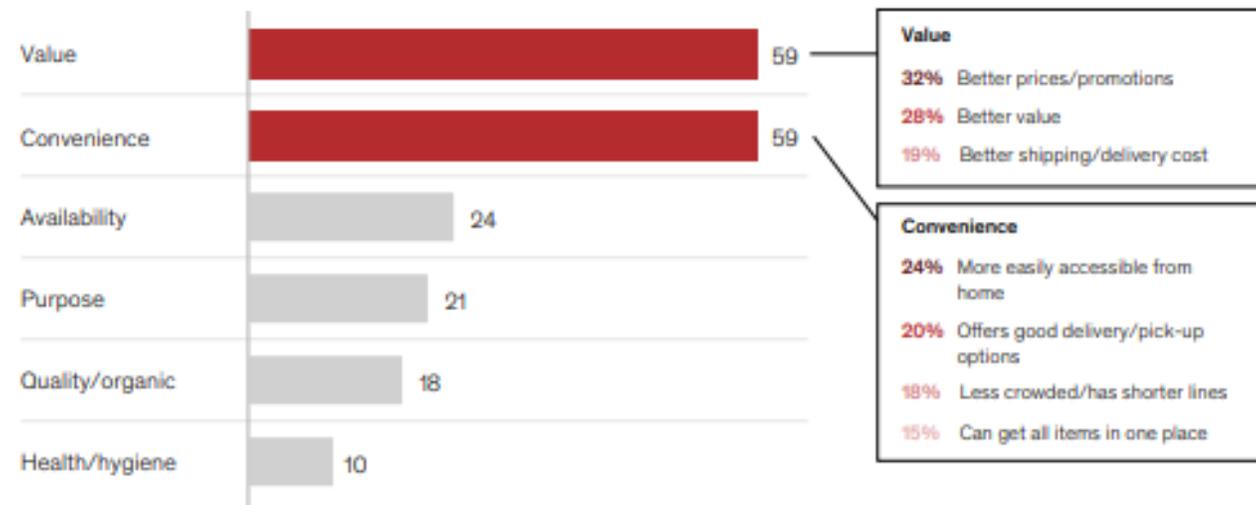
la valeur est un moteur du changement

mais aussi la commodité

Nearly 60 percent of consumers cite value and convenience as drivers for trying new places to shop.

Reason for shopping at a new retailer/store/website in the past three months¹
% of respondents selecting reason in top three

Breakdown of main reasons
% of respondents per category²



¹ Q: For respondents who mentioned they've shopped from a new retailer/store/website since the coronavirus (COVID-19) situation started: What was the main reason you decided to try this new retailer/store/website? Select up to 3.

² Figures may not sum to 100%, because of rounding; figures are not exclusive.

Source: McKinsey & Company COVID-19 Europe Consumer Pulse Survey 11/9-11/16/2020, n = 5,232 (Italy, France, Germany, Spain, UK) sampled and weighted to match European general population 18+ years

Emballage, durabilité

European consumers are buying based on sustainability and healthy, hygienic packaging.

Shopping behavior since COVID-19 has started,¹ % of respondents in Europe

Buying based on:	Net intent ²				
	United Kingdom	Germany	France	Spain	Italy
Healthy and hygienic packaging	+9	+7	+7	+16	+12
Retailers promotion of sustainable solutions	+7	+8	+3	+17	+12
Sustainable/eco-friendly products	+8	+10	+9	+14	+9
How companies take care of the safety of their employees	+8	+5	+7	+16	+11
Company's purpose/values	+2	-4	-1	+10	+5

■ Highest increase in intent per country

■ Positive intent ■ Negative intent

¹ Q: Which best describes how often you are doing each of the following items? Possible answers: "Doing less since coronavirus started"; "Doing about the same since coronavirus started"; "Doing more since coronavirus started."

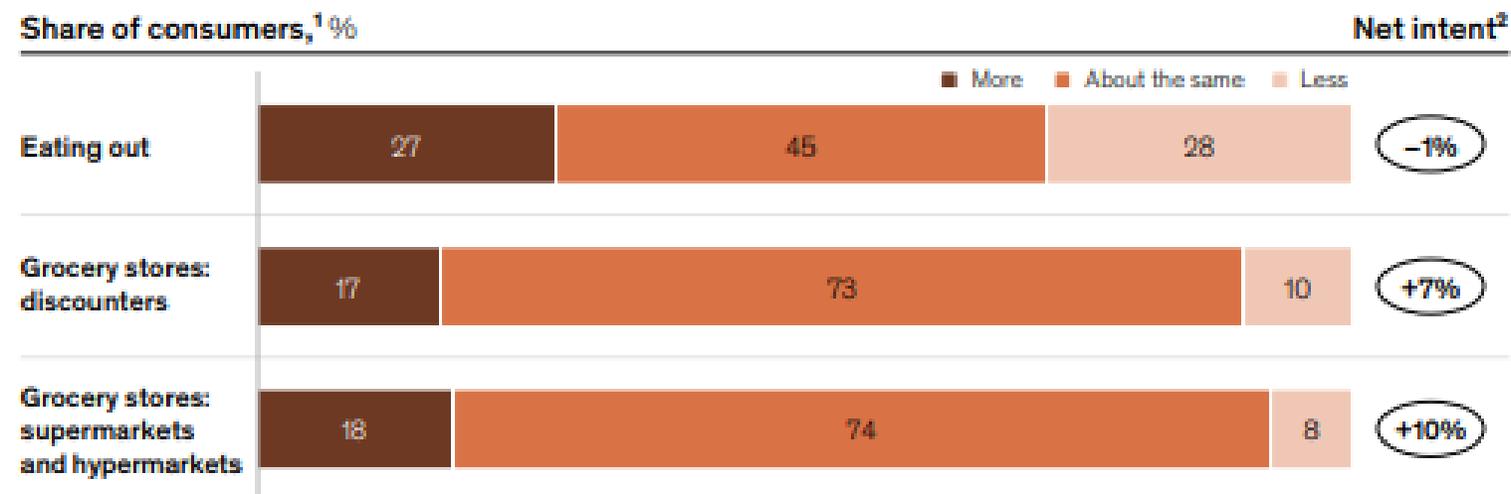
² Net intent is calculated by subtracting the % of respondents stating they expect to decrease time spent from the % of respondents stating they expect to increase time spent.

Source: McKinsey & Company COVID-19 Europe Consumer Pulse Survey 11/9-11/16/2020, n = 5,232 (Italy, France, Germany, Spain, UK) sampled and weighted to match European general population 18+ years

L'augmentation des dépenses alimentaires

Même après la crise

Consumers expect to spend more money on groceries postpandemic than they did prepandemic.



¹ Question: Thinking about after COVID-19, do you expect that you will spend more, about the same, or less money on food in these channels as compared with pre-COVID-19?

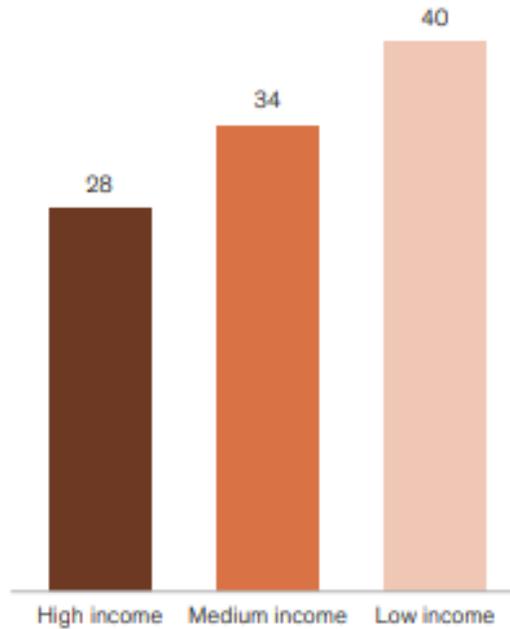
² Net intent is calculated by subtracting the percentage of respondents stating they expect to decrease spending from the percentage of respondents stating they expect to increase spending.

Focus sur le prix

Consumers in all income groups look for value and more healthy products.

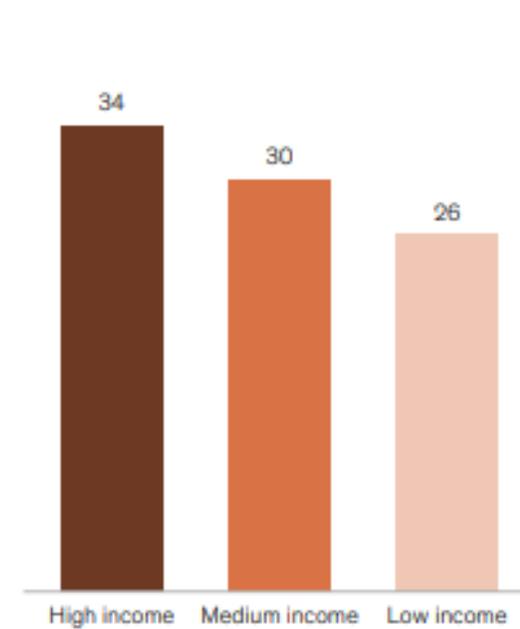
Consumers who plan to look for ways to save money¹

Net share of consumers, %²
Average in Europe



Consumers who plan to focus on healthy eating and nutrition¹

Net share of consumers, %²
Average in Europe



¹ Question: Which of the following statements best describes your attitude toward grocery shopping in 2021 as compared with 2020? Answers: More, about the same, less.

² The percentage is calculated as net sentiment (deducting the percentage of people intending to do the activity less in 2021 vs 2020 from the percentage of people intending to do the activity more).

Guerre en Ukraine

Les huiles et graisses

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1. VOEDING EN NIET-ALCOHOLISCHE DRANKEN : TOTAAL, OLIËN EN VETTEN : TOTAAL, MAR...

Year	2021												2022			
Productcategorie	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April
1. Voeding en niet-alcoholische dranken : Totaal	1.25%	-0.21%	-0.58%	-1.19%	-1.58%	-1.23%	-0.87%	-0.34%	-0.99%	-0.31%	0.24%	1.19%	2.38%	3.95%	4.82%	5.31%
Oliën en vetten : Totaal	2.83%	0.69%	0.00%	-0.85%	-0.08%	0.70%	1.29%	1.64%	1.75%	2.09%	3.61%	6.17%	6.77%	12.60%	12.77%	13.25%
Andere eetbare oliën	6.28%	0.77%	1.77%	-0.29%	1.82%	4.20%	5.31%	8.01%	9.96%	9.55%	13.08%	18.08%	15.83%	23.93%	21.06%	25.41%
Boter	1.81%	-1.52%	-2.82%	-1.82%	-0.23%	1.07%	3.56%	2.89%	1.97%	2.40%	3.22%	4.59%	5.00%	14.38%	12.57%	13.70%
Brood	0.05%	0.04%	-0.08%	0.06%	0.06%	0.01%	0.27%	0.76%	0.40%	1.61%	1.74%	2.59%	3.92%	4.96%	5.12%	10.23%
Margarine en plantaardige vetten	5.51%	1.72%	3.95%	0.75%	-1.79%	-0.76%	-3.22%	-3.49%	-3.57%	-1.04%	0.68%	4.60%	4.68%	8.11%	10.18%	7.53%
Olijfolie	-0.92%	4.43%	-0.46%	-1.22%	1.56%	-0.32%	0.13%	2.20%	3.41%	1.01%	2.51%	4.37%	7.66%	7.16%	11.52%	12.13%

Guerre en Ukraine

Pain et Céréals

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1. VOEDING EN NIET-ALCOHOLISCHE DRANKEN : TOTAAL, DEEGWAREN EN COUSCOUS, ONT...

Year	2021												2022			
Productcategorie	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April
1. Voeding en niet-alcoholische dranken : Totaal	1.25%	-0.21%	-0.58%	-1.19%	-1.58%	-1.23%	-0.87%	-0.34%	-0.99%	-0.31%	0.24%	1.19%	2.38%	3.95%	4.82%	5.31%
Deegwaren en couscous	3.95%	-0.81%	-1.89%	-3.04%	-7.66%	-0.66%	-1.25%	-0.03%	-2.99%	0.46%	2.94%	0.52%	8.57%	9.11%	12.36%	11.62%
Brood	0.05%	0.04%	-0.08%	0.06%	0.06%	0.01%	0.27%	0.76%	0.40%	1.61%	1.74%	2.59%	3.92%	4.96%	5.12%	10.23%
Ontbijtgranen	7.01%	-3.44%	-0.67%	-2.39%	-1.64%	0.20%	-3.67%	6.10%	-0.99%	0.06%	3.45%	0.52%	4.49%	4.15%	1.87%	8.71%
Meel en andere granen	-0.19%	-1.52%	0.29%	0.57%	-1.94%	-2.66%	-1.12%	-0.33%	-0.34%	0.50%	0.61%	3.37%	6.82%	10.07%	9.77%	9.30%

Perspectives

La nourriture devient plus chère

- **Guerre en Ukraine**
- **Energie**
- **Croissance démographique**
- **Evolution dans la durabilité**
- **Changement climatique**



*Pouvoir d'achat des ménages :
Comprendre et appréhender les évolutions actuelles*

Focus sur l'alimentation

Questions - réponses