

Horticulture

Fruit | Vegetables | Potatoes
| Ornamentals



Top 12 Export products

1. Hops - £19.3 million
2. Apples - £16 million
3. Lettuce - 14.5 million
4. Red and Blackcurrants, Berries and Sloes - £11 million
5. Cut flowers - £10.6 million
6. Carrots and Turnips - £10.4 million
7. Cauliflower and Broccoli - £9.3 million
8. Cuttings, slips and other young plants - £8.07 million
9. Veg and Strawberry plants - £ 6.9 million
10. Mushrooms - £6.6 million
11. Bulbs Narcissi dormant - £4.52 million
12. Strawberries - £4 million

(average value 2017-2019)¹

The domestic market

Horticulture and potatoes is a relatively small sector in acreage but the largest for farm gate value, with 2% of farmed land and nearly 20% of farmgate value. British growers produce 3.2million tonnes of fruit and vegetables every year – on 166,000 hectares of land. In addition, British growers grow 14,000 hectares of plants and flowers and 6 million tonnes of potatoes. Exports are limited but where they exist, trade is often high value and overseas demand helps to build resilience in the sector.

The farm gate value of UK fruit, vegetables, plants, and flowers is around £3.5bn.

Fruit & Vegetables

With a growing global middle class, we see overseas populations become increasingly focussed on healthy food and lifestyle choices. In addition, obesity issues around the globe are being combated by domestic government fruit and vegetable campaigns. This push for healthy foods present various opportunities for UK producers to capitalise upon, particularly within arid parts of the world where water shortages are increasingly problematic. Export opportunities are strongest in destinations where consumer demands have shifted to healthier food choices, largely a result of growing young populations and disposable incomes.

Our fruit and vegetables are grown to incredibly high food safety and environmental standards to produce safe food and take care of our environment. The UK's approach to food safety and hygiene significantly contributes to the global reputation of UK produced horticulture, underpinned by whole

chain assurance schemes such as Red Tractor. Moreover, UK growers are required to use plant protection products in a responsible and sustainable manner, with growers adopting methods of Integrated Pest Management (IPM) to manage the risks to the wider environment whilst also ensuring quality crops are grown successfully.

The US is a dominant player in the global horticulture market. Despite this the UK is already making inroads with UK exports of fruit and vegetables to the USA worth almost £5million in 2019.

Value added products

Jams, juices and ciders are just a few examples of the value-added products we export, which will in at least part, utilise the UK's fruit and vegetable produce. Across 2017-2019, average jam exports to the EU and non-EU countries totalled around £24 million with growing demand for British taste. The greatest growth in jam demand is projected for Belgium, France, Norway and Spain. Similarly,



Horticulture



significant demand exists in North America where jam and preserves are consumed on a daily basis. In particular, there is increased demand for healthy, nutritious and organically produced jams, jellies and preserves and offer opportunity for British producers.

Cider

A number of British cider makers have exported for many years, with the UK cider industry now exporting to over 50 countries around the world. UK producers are recognised for their quality ciders, locally grown produce and heritage and this leads to strong demand. In 2020, Canada ranked highest for UK cider exports, valuing around £6 million, followed by the US accounting for approximately £5.5 million worth of UK exports.

**Britain produces
90% of the world's
daffodils.**

The UK is renowned as the world leader for its daffodil production with over 4,000 hectares grown. Although a significant number of daffodils are produced for the domestic market, nearly half of the output of bulbs and cut flowers is exported to Europe, the USA and Canada. USA is the key market for UK daffodil bulbs with demand for around 2,000 tonnes per annum.

Seed Potatoes

Seed potato production in Great Britain is a highly specialised and innovative industry. It accounts for 14% of the UK's croppable (planted) potato area, produced by a group of around 300 registered seed growers. Britain exports seed to around 50 countries worldwide. Export volumes from the UK have risen by around 20% between 2010 and 2020, and seed exports now generate approximately £33.5m income per annum for Britain's potato industry. Prior to leaving the EU, in 2018, the UK exported over 96,000 tonnes of seed potatoes with over a third of that traveling to the EU. Since the UK has left the EU, GB

seed potatoes have effectively been banned from being imported into the EU and Northern Ireland due to the UK and EU unable to find a political compromise on dynamic alignment. Around 30,000 tonnes of GB seed potatoes were imported each year into the EU, principally from Scotland, with a similar amount of EU seed potatoes exported to the UK. This trade has developed and flourished because of the recognised high quality of seed potatoes grown in GB underpinned by baseline standards that our growers continue to comply with today. Urgent action is needed by the EU Commission to agree a new model for two-way trade in seed potatoes between GB and the EU (and Northern Ireland). This is essential and must be agreed without delay in order to allow potato growers to plan for future cropping seasons. In this regard it is worth noting that growers in Ireland and Northern Ireland traditionally import significant quantities of GB seed potatoes and without movement on this issue their cropping plans will be severely impacted.

1. Source: Defra, Horticulture statistics 2020



Horticulture



Case Study

Adrian Scripps Ltd

Based in Kent, Adrian Scripps Ltd is a premier grower and packer of English fruit including a variety of apples, pears and grapes.

'We specifically export apples, supplying 18kg cardboard cartons for fresh consumption directly to multiple retailers and wholesale markets located across the Middle East. Our biggest exporting markets are located largely within the Middle East resulting in the total value for the whole region annually in excess of £750,000. The business would prefer to supply product directly to UK retailers and the domestic market, however it is very difficult to generate sales for the size profile of apples we export. In total, exporting generates approximately 5% of our turnover.'

'We identify opportunities for export growth in the Far East and within regions where there is an understanding of the value of UK produce and a subsequent support for quality. Notably, opportunities are redeemable where there is a loyalty to the Union Jack and British provenance and we are utilising this connection through our brand marketing and delivery cartons for exports, of which depict the British flag and London skyline.'

James Simpson, Managing Director - Adrian Scripps Ltd

Although there appear to be lucrative opportunities for Adrian Scripps, particularly within the Far East, challenges when exporting include currency fluctuations and shipping costs. Looking at technical barriers the business faces; phytosanitary restrictions, current and historical, are preventing access to potential markets. Unlike other European nations, whom have had opportunity and agreements in place for many years, the UK is yet to agree the important protocols, terms and conditions to overcome phytosanitary requirements. As a result, government action to negotiate SPS requirements is needed to help the growth of future horticultural exports. To further support the growth of exports by businesses such as Adrian Scripps, James asks for assistance in opening new markets and utilising diplomatic relationships to negotiate important technical barriers which limit potential market access.

