IRO Poland 2020

Tim Place – England
Oliver Thomson - Scotland
UK Production Markets

- **Fresh sales are approx 95%**
  - Supermarkets, Wholesale and Farm shops

- **Frozen sales are only approx 5%**
  - Supermarkets, Manufacturers and Food service..
UK Raspberry production

The most recent figures available from DEFRA are for 2018:

- **Area**: 1,457 Ha
- **Volume**: 15,100 t
- **Value**: £8093/t
- **Yield**: 10.3 t/ha

Source: DEFRA Aug 2019
UK Raspberry production volume

Source: DEFRA Aug 2019
UK Raspberry production Area

Source: DEFRA Aug 2019
Value of UK grown Raspberries

Source: DEFRA Aug 2019
Value/tonne UK grown Raspberries

£ per tonne

Source: DEFRA Aug 2019
UK Varieties

- **Current** – Driscoll Maravilla, Berry Gem, Berry Jewel, Vajolet, Lagorai

- **New** – Ovation, Paragon, Nobility
  - Malling Bella and Charm
Berry Breeding

- We purchase new certified plants every 4 years

- Large scientific institutes and breeding companies are now using genetically focused breeding techniques to produce potentially crop changing innovation.

- JHI and MRS in Dundee are working on gene markers for:
  - Root rot (phytophthora) resistance
  - Cane diseases (Gene H)
  - Fruit size
  - Post harvest softening.
Fresh sales of UK grown fruit

Source: British Summer Fruits
UK Growing Systems

- 70% of our group now grow in pots
- Due to:
  - Soil disease problems
  - Cost of tunnels and growing system..
Maravilla
Industry Issues

- National Living Wage
- Irrigation licence reductions – EU WFD, Habitat regs
- Loss of Crop protection products
- Spotted wing drosophila
- New clean plant material
- Wind Damage
- Brexit vote
BREXIT?

Key Issues: Availability of labour, Movement of plant material, EU funding, Trading with the EU
Fresh Raspberry Market information

- 2019 Retail value £338 million
- 48% of the population purchase fresh raspberries.
- Last year Turnover growth +12.4%
- Last year Volume growth +17.2%
- Last year prices fell by 9.2%
- The average customer bought raspberries 11.7 times in the last year..

Source: Kantar World Panel
4 weekly Retail Raspberry Volume including imports

Source: Kantar World Panel
Fresh Raspberry Retail Sales Volume including imports

Source: Kantar World Panel
Fresh Retail Raspberry Sales Value including imports

Source: Kantar World Panel
UK Exports

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh</td>
<td>428t</td>
<td>529t</td>
<td>422t</td>
</tr>
<tr>
<td></td>
<td>£6704/t</td>
<td>£7427/t</td>
<td>£4380/t</td>
</tr>
<tr>
<td>Frozen</td>
<td>111t</td>
<td>212t</td>
<td>131t</td>
</tr>
<tr>
<td></td>
<td>£3366/t</td>
<td>£2916/t</td>
<td>£2041/t</td>
</tr>
</tbody>
</table>

- Fresh: to Spain, Germany, Ireland, Romania.
- Frozen: to Netherlands, Ireland, France, Serbia, Iceland.

Source: HMRC UK Trade info 08112031 May 2020
## UK 2019 Fresh Imports

<table>
<thead>
<tr>
<th>Country</th>
<th>Tonnes</th>
<th>Value £000s</th>
<th>£/t</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>16,691t</td>
<td>£99,027</td>
<td>£5,933/t</td>
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<tr>
<td>Netherlands</td>
<td>3,292</td>
<td>£20,335</td>
<td>£6,177/t</td>
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<tr>
<td>Portugal</td>
<td>3,208</td>
<td>£21,330</td>
<td>£6,649/t</td>
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<tr>
<td>Morocco</td>
<td>1,117</td>
<td>£5,600</td>
<td>£5,013/t</td>
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<tr>
<td>Italy</td>
<td>787</td>
<td>£1,741</td>
<td>£2,212/t</td>
</tr>
<tr>
<td>South Africa</td>
<td>780</td>
<td>£9,398</td>
<td>£12,048/t</td>
</tr>
<tr>
<td>Poland</td>
<td>610</td>
<td>£995</td>
<td>£1,631/t</td>
</tr>
<tr>
<td>Germany</td>
<td>549</td>
<td>£4,242</td>
<td>£7,727/t</td>
</tr>
<tr>
<td>Others</td>
<td>868t</td>
<td>£3,804</td>
<td>£4,380</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>27,902t</td>
<td>£166,472</td>
<td>£5,966/t</td>
</tr>
</tbody>
</table>

Source: HMRC UK Trade info 08102010 May 2020
Fresh Import variations over 2 years to 2019

- Volume growth of 91% over 2 years
- Average price per tonne has decreased from £7043/t to £5966/t reduction of 15%
- The main growth is from Spain, doubling imports to the UK.
## UK 2019 frozen Imports

<table>
<thead>
<tr>
<th></th>
<th>Tonnes</th>
<th>Value £000</th>
<th>£/t</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serbia</td>
<td>4921t</td>
<td>£10367</td>
<td>£2107/t</td>
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<tr>
<td>Poland</td>
<td>1532t</td>
<td>£2344</td>
<td>£1530/t</td>
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<tr>
<td>Netherlands</td>
<td>1263t</td>
<td>£1441</td>
<td>£1141/t</td>
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<tr>
<td>Belgium</td>
<td>1263t</td>
<td>£1503</td>
<td>£1190/t</td>
</tr>
<tr>
<td>Chile</td>
<td>503t</td>
<td>£906</td>
<td>£1801/t</td>
</tr>
<tr>
<td>Croatia</td>
<td>381t</td>
<td>£654</td>
<td>£1717</td>
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<tr>
<td>Germany</td>
<td>324t</td>
<td>£1287</td>
<td>£3972/t</td>
</tr>
<tr>
<td>Denmark</td>
<td>296t</td>
<td>£546</td>
<td>£1844/t</td>
</tr>
<tr>
<td>USA</td>
<td>168t</td>
<td>£541</td>
<td>£3220</td>
</tr>
<tr>
<td>Other</td>
<td>168t</td>
<td>£1174</td>
<td>£6988/t</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>10819t</strong></td>
<td><strong>£20763</strong></td>
<td><strong>£1919/t</strong></td>
</tr>
</tbody>
</table>

Source: HMRC UK Trade Information 08112031 May 2020
Frozen import variations over 2 years to 2019

- The average price has decreased from £2.43/kg to £1.92/kg (21% decrease)
- The volume has remained similar.
- Serbia has increased their volume.
- Poland has seen a massive reduction from 4253t down to 1532 tonnes. – Why?
Summary

- England now grows only for the fresh market – Good flavour and shelf life. (only surplus fruit is frozen)
- Healthy eating and good flavour is encouraging the market to continue to grow by 17% last year
- However the average fresh selling price has dropped by 9.2%
- The huge increase in volume has come mainly from cheaper fruit imported from Spain