

# IRO Poland 2021

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 2019:

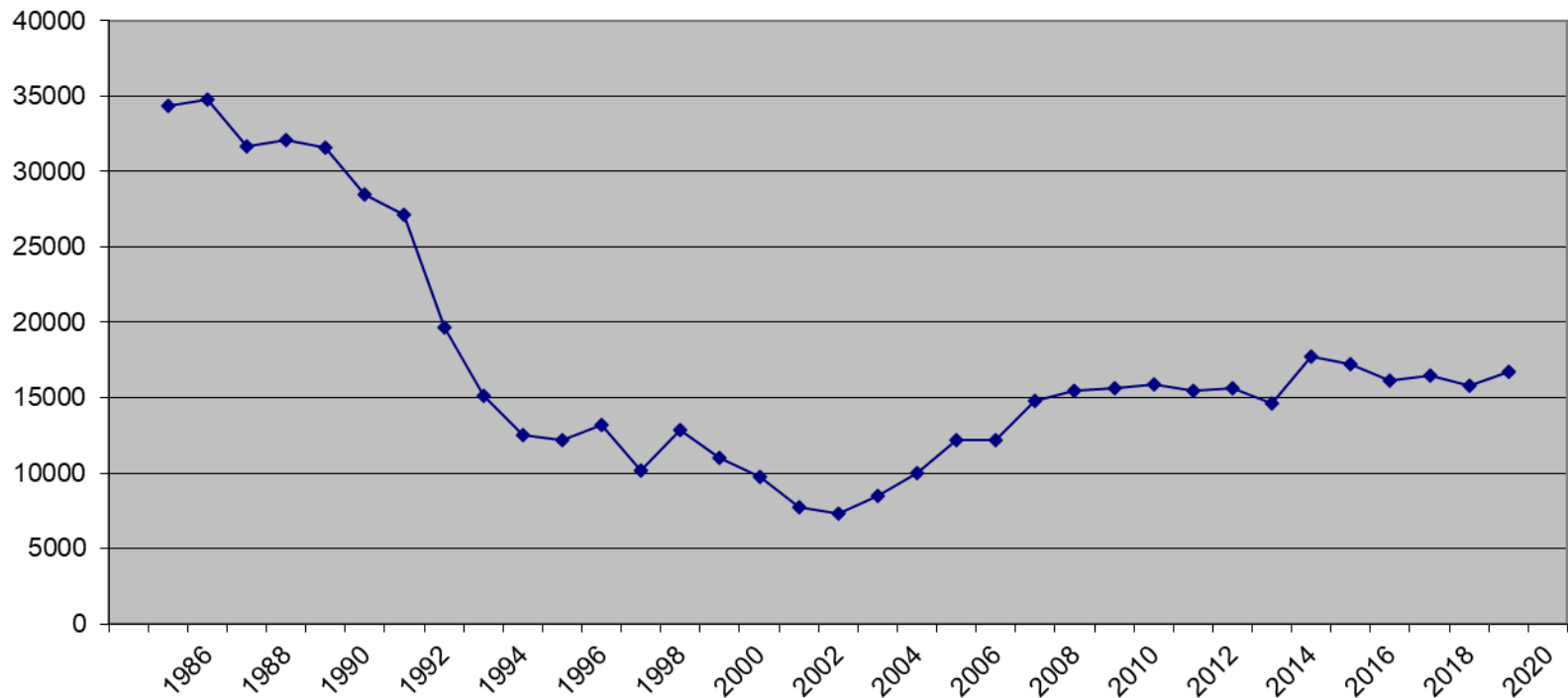
- Area 1,424 Ha
- Volume 16,700 t
- Value £8790/t
- Yield 11.7 t/ha

Source: DEFRA Aug 2020



# UK Raspberry production volume

Tonnes

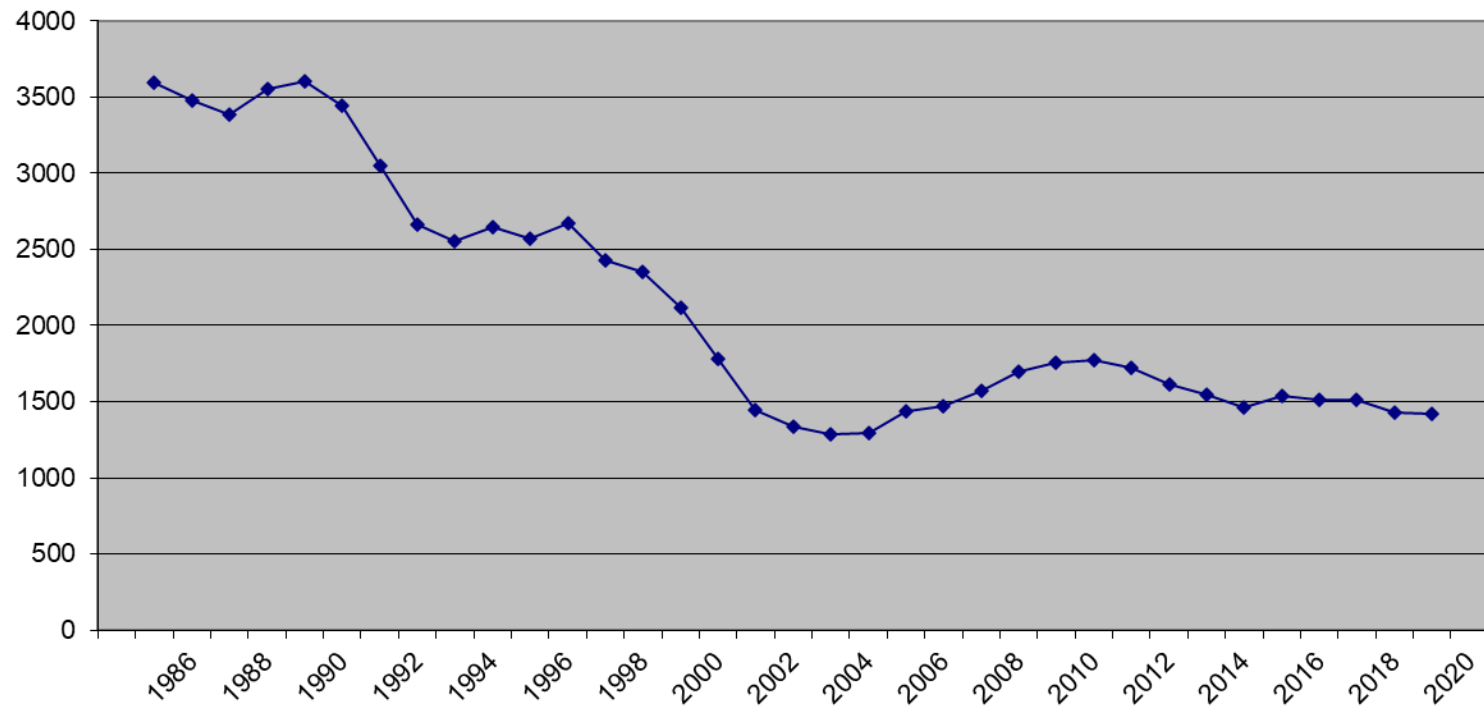


Source: DEFRA Aug 2020



# UK Raspberry production Area

Hectares

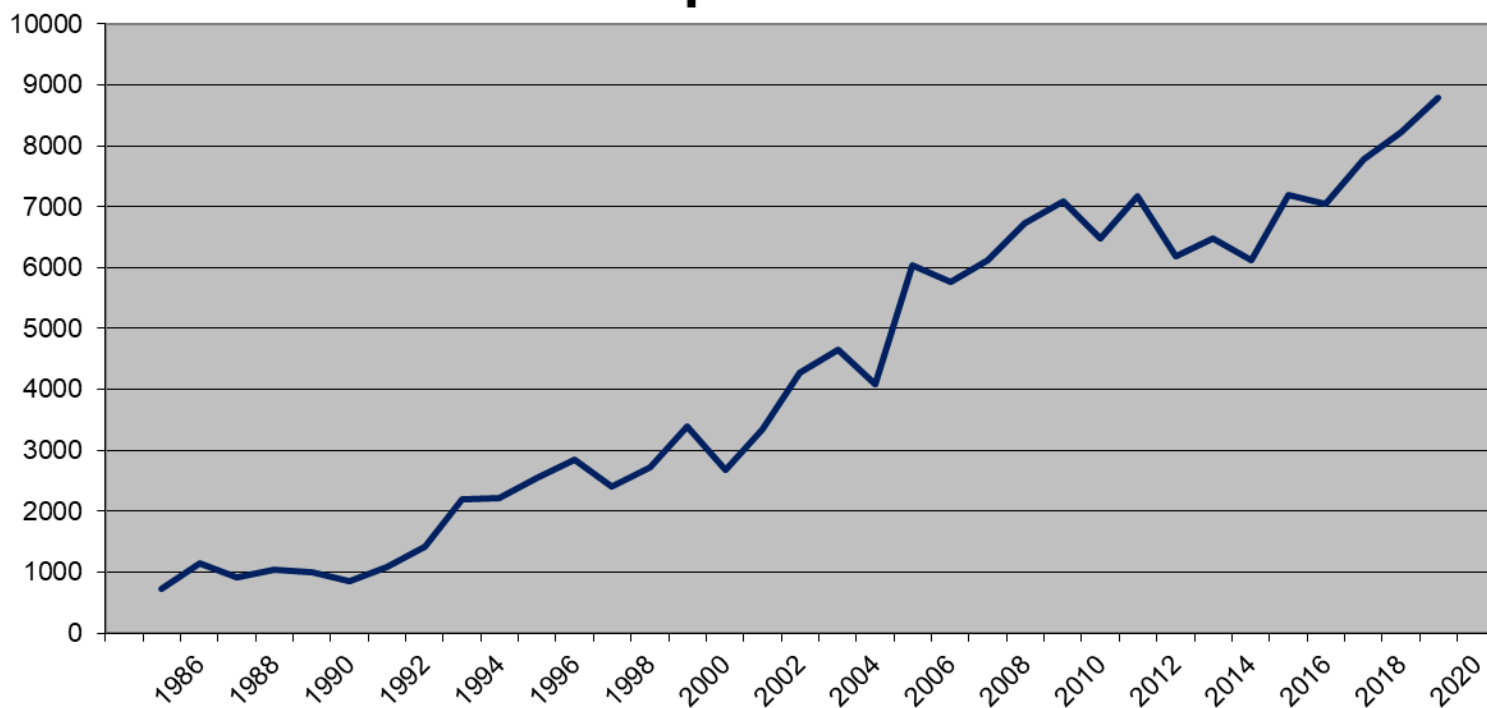


Source: DEFRA Aug 2020



# Value/tonne UK grown Raspberries

£ per tonne



Source: DEFRA Aug 2020



# UK Varieties

- **Current** – Driscoll Maravilla, Berry Gem, Berry Jewel, Ample, Vajolet, Lagorai, Malling Bella
- **New** – Nobility, Majestic, Kwanza, Ovation.



# Berry Breeding

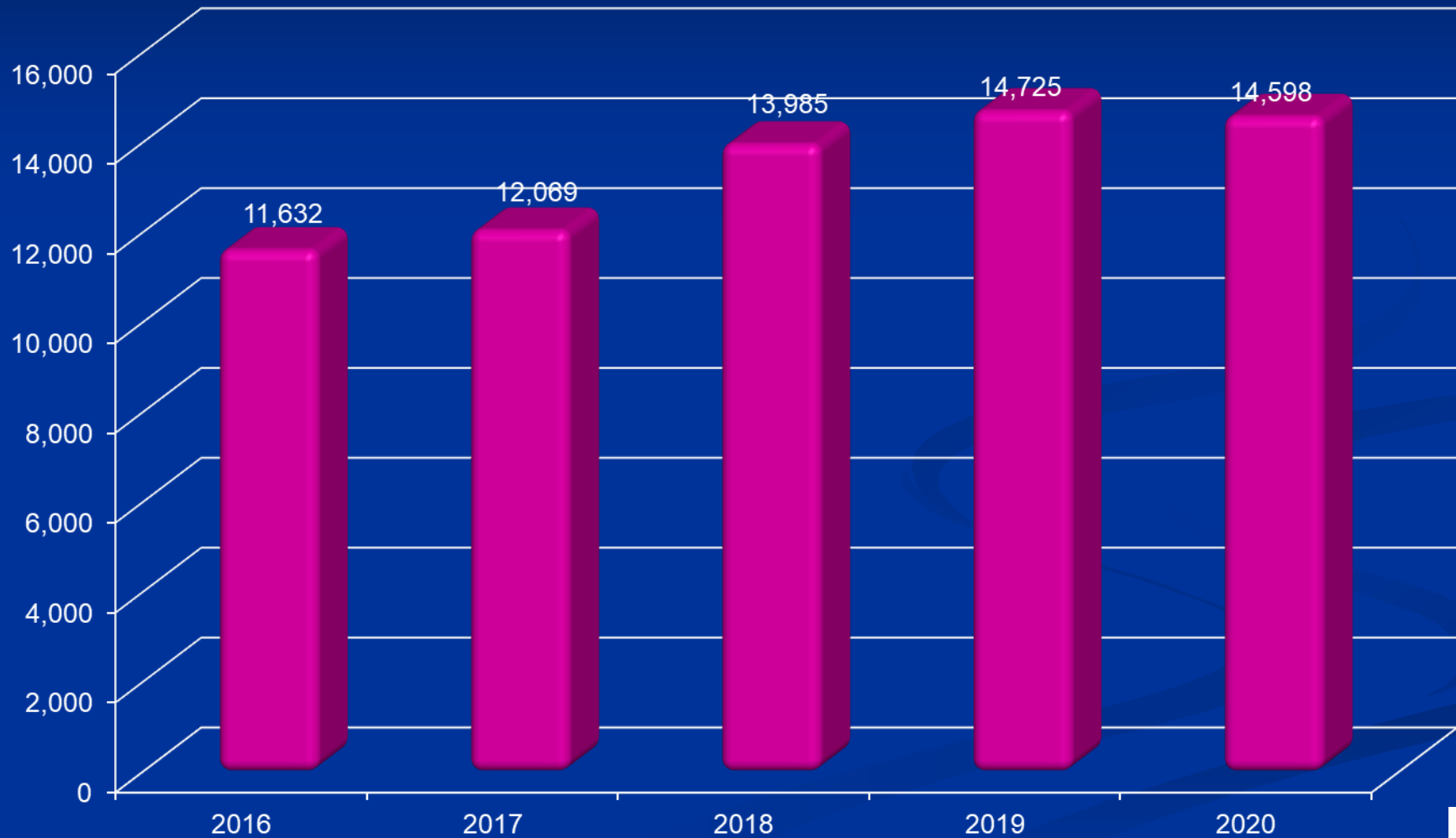
- We purchase new certified plants every 4 years
- Large scientific institutes and breeding companies are now using genetically focused breeding techniques to produce potentially crop changing innovation.
- JHI and MRS in Dundee are working on gene markers for:
  - Phytophthora resistance, Cane diseases, Fruit size, Shelf life and Flavour.
- We hope that Gene Editing may soon be allowed, which may give a huge step forwards.



# Fresh sales of UK grown fruit



BSFL Volume Data



Source: British Summer Fruits



# UK Growing Systems

- 70% of our group now grow in pots, in Polytunnels
- Due to:
- Soil disease problems
- Reduce picking costs
- Planning issues for Poly tunnels
- However growers are now moving further to only grow a one year annual crop from Long canes



# New Long cane substrate site

- Ground levelling and upgrade drainage
- Bespoke investment in 'high spec' tunnels, fertigation system and multiple lateral supports
- Rainwater collection, storage and treatments
- Cost for tunnel, irrigation and support system is 70,000euro/ha
- Plus plant cost 30,000euro/ha/year for long canes



# Grow the long canes



# Pack ready for cold storage



# Place out in field to grow



# Maravilla Crop



After cropping remove the canes  
and shred with a Bio chopper



# Industry Issues

- Covid 19
- Availability of seasonal harvest staff
- Continual increase in the National Living Wage
- Irrigation licence reductions – Environmental Habitat regs
- Loss of Crop protection products
- Spotted wing drosophila
- New good quality, clean plant material
- Wind Damage to poly tunnels
- Carbon footprint and CO2 reduction

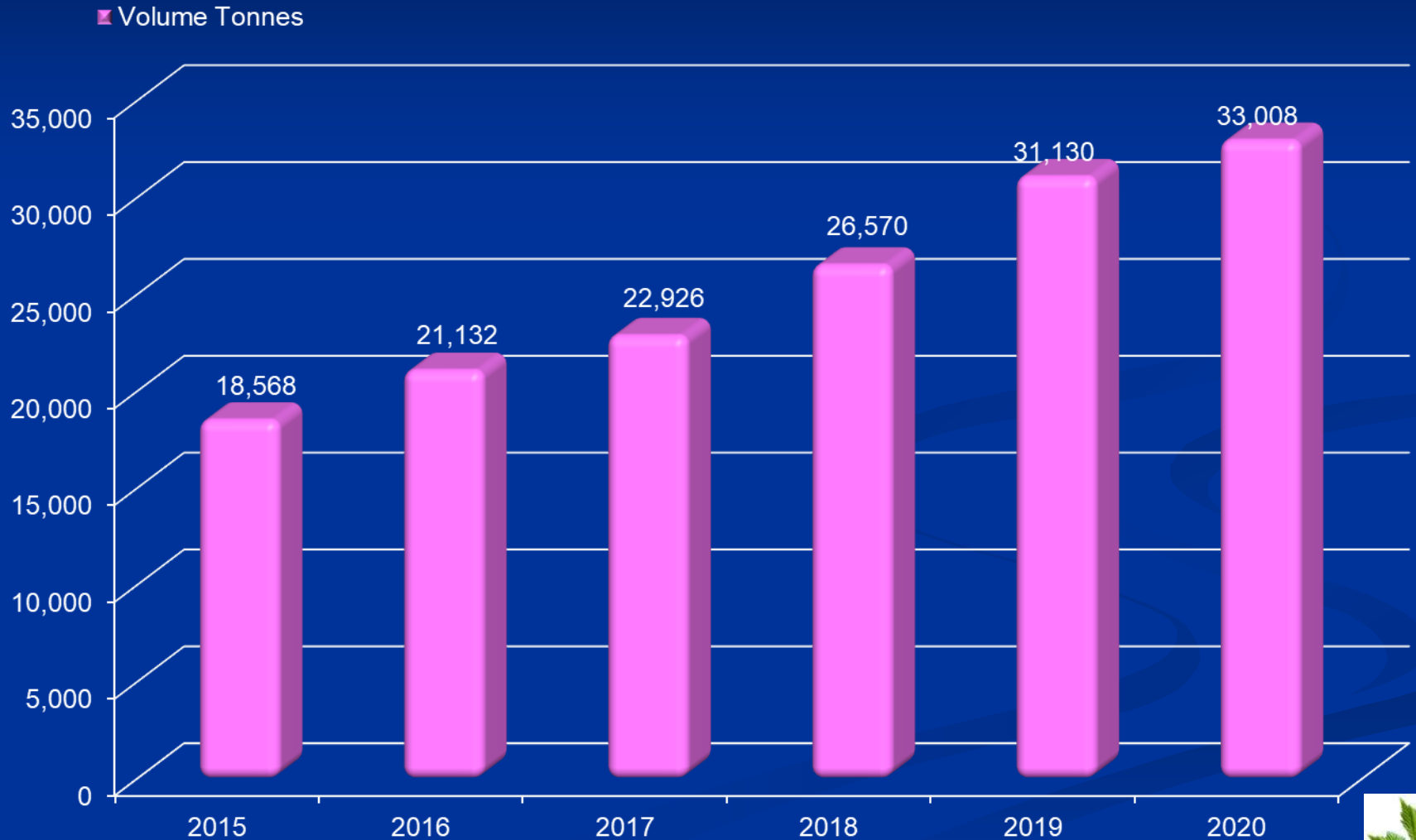


# Fresh Raspberry Market information including imports

- 2020 Retail value £368 million
- 48% of the population purchase fresh raspberries.
- Last year Turnover growth +9%
- Last year Volume growth +6%
- Last year prices rose by 3%
- The average customer bought raspberries 11.9 times in the last year..



# Fresh Raspberry Retail Sales Volume including imports

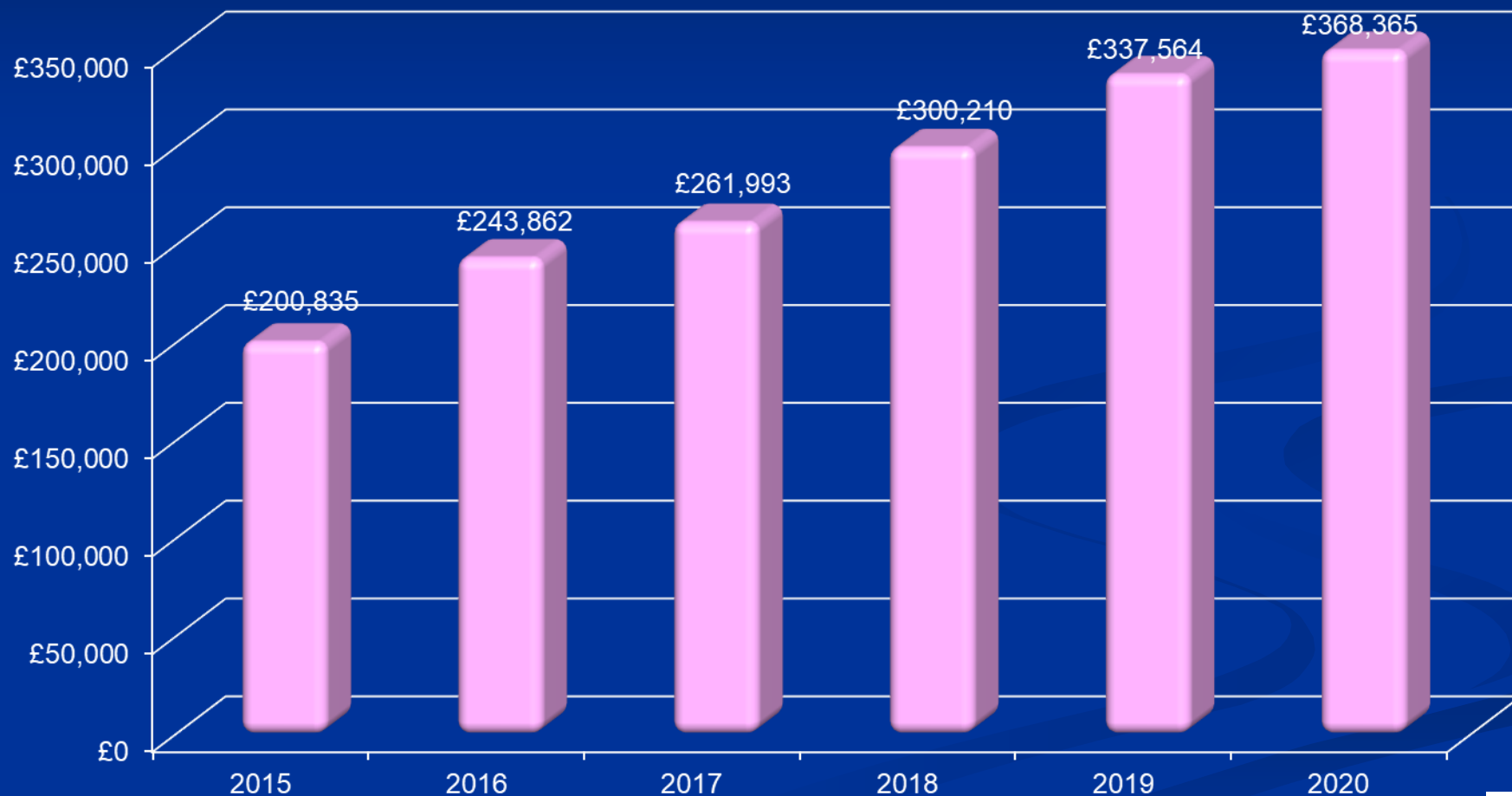


Source: Kantar World Panel



# Fresh Retail Raspberry Sales Value including imports

Value £000's...



Source: Kantar World Panel



# UK Exports

	<u>2018</u>	<u>2019</u>	<u>2020</u>	
■ Fresh	563t	461t	687t	to Portugal, Germany, France
■	£7382/t	£4607/t	£5373/t	
■ Frozen	215t	141t	423t	to Ireland, Netherlands
	£2916/t	£2794/t	£2695/t	

Source: HMRC UK Trade info 2104b001 April 2021  
2020 data are subject to amendments



# UK Imports

	<u>2018</u>	<u>2019</u>	<u>2020</u>
■ Fresh	17375t	28,623t	26,224t
■	£7070/t	£5986/t	£6357/t
■ Frozen	10,386t	11,469t	13,040t
■	£2053/t	£1920/t	£2388/t

Source: HMRC UK Trade info 2104b001 April 2021  
2020 data are subject to amendments



# UK 2019 Fresh Imports

	<u>Tonnes</u>	<u>Value £000s</u>	<u>£/t</u>
■ Spain	14506t	£89,818	£5,985/t
■ Netherlands	6,548	£44,282	£6,763/t
■ Portugal	1,909	£15,498	£8,145/t
■ South Africa	707	£8,014	£11,333/t
■ Germany	683	£5,169	£7,564/t
■ Italy	623	£1,428	£2,292/t
■ Kenya	430	£1,931	£4,491/t
■ Belgium	222	£279	£1,255/t
■ Poland	155	£340	£2,190/t
■ Others	447t	£2937	£6,570/t
<b>■ TOTAL</b>	<b>26,224t</b>	<b>£166,696</b>	<b>£6,357/t</b>

Source: HMRC UK Trade info 2104b001 April 2021  
2020 data are subject to amendments



# Fresh Import variations over 2 years to 2020

- Volume growth of 51% over 2 years
- Average price per tonne has decreased from £7070/t to £6357/t reduction of 10%
- The main growth is from the Netherlands and Spain.



# UK 2020 frozen Imports

	<u>Tonnes</u>	<u>Value £000</u>	<u>£/t</u>
■ Serbia	6115t	£14337	£2345/t
■ Poland	2161t	£4271	£1976/t
■ Belgium	1499t	£1808	£1207/t
■ Spain	1048t	£4980	£4750/t
■ Netherlands	1005t	£1492	£1485/t
■ Denmark	277t	£594	£2147/t
■ Chile	183t	£489	£2670/t
■ Germany	179t	£1000	£5601/t
■ China	142t	£161	£1131/t
■ <u>Other</u>	<u>431t</u>	<u>£2002</u>	<u>£4645/t</u>
■ <b>TOTAL</b>	<b>13040t</b>	<b>£31,134</b>	<b>£2388/t</b>



# Frozen import variations over 2 years to 2020

- The average price has increased from £2.05/kg to £2.39/kg (17% increase)
- The volume has increased by 26%.
- The increase has come from Serbia, Poland and Spain.



# Summary

- England now grows only for the fresh market – Good flavour and shelf life. (only surplus fruit is frozen)
- UK production is stable at about 16,000t per year
- Healthy eating and good flavour is encouraging the market volume to continue to grow by 9% last year
- With the average fresh selling price increasing by 3% last year.
- Annual Long Cane production is increasing, to improve quality, fill the season timing gaps and reduce picking costs.



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