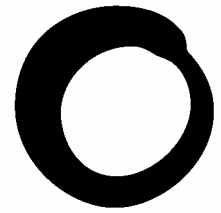


Media Briefing

18th November 2003



**Friends of
the Earth**

HOME GROWN APPLES IN SHORT SUPPLY IN BIG SUPERMARKETS

Friends of the Earth has carried out a survey of supermarkets, greengrocers and markets to find out which outlets were providing UK grown fruit and vegetables at a reasonable price. Friends of the Earth is concerned that if British farmers and growers are not supported by retailers paying them a fair price for their produce more will leave the land leading to a loss of diversity on our farmed land, damage to rural economies and an increase in the distance our food travels. The group is also concerned that as more and more of our smaller independent shops close down it may become harder for people without cars to access fresh produce at an affordable price. The big supermarkets claim to offer the cheapest prices to the customer but does that apply to fresh produce?

For the third year running [1] we found that the biggest supermarkets are not supporting UK apple growers. In a year when an industry journal has described the home grown dessert apple crop as “the best for many years” [2] we found that well over half the apples on Asda and Tesco’s shelves were imported. Greengrocers had more home-grown apples, and market stalls sold a wider range of UK apple varieties overall while supermarkets relied on imported varieties to boost their choice. Farmers’ markets are the best place to buy local produce but greengrocers provided more home grown fruit than supermarkets and also sold some local fruit and vegetables. Despite their claims on price Asda and Tesco were more expensive for apples than markets and charged very high prices for ‘added value’ carrots aimed at parents.

This is the third year that we have carried out a survey to find out where supermarkets source their apples at the height of the British season, and it is the second year we have included greengrocers and markets for comparison. It is also the second year we have looked at the price of apples. This year we also included convenience stores and we looked at potatoes and carrots as well as apples. This year due to the volume of data to be collected we only included the largest two supermarkets Tesco and Asda in our survey.

Key results

- The average proportion of UK grown apples in Asda and Tesco stores was 38%. Greengrocers provided 46% UK apples.
- Tesco had slightly more UK non organic apples (42% UK) than Asda (32% UK) but both had slightly fewer UK apples than last year.
- A significant proportion (16%) of apples in supermarkets were imported from outside the EU including from the USA, New Zealand, Chile, Australia, South Africa and Canada
- Apples were cheaper in greengrocers and markets (including farmers’ markets) than in

- Tesco and street markets beat Asda on price
- Almost all maincrop potatoes in all outlets were homegrown.
- The majority of carrots on sale in all outlets were also from the UK but 'baby' carrots from Tesco came from Holland and Zambia
- Markets were slightly cheaper than supermarkets for 'ordinary' carrots but supermarkets charged high prices for 'added value' products.
- Farmers' markets are the best place to buy local produce but street markets and greengrocers also provided local apples, potatoes and carrots. Some convenience stores sold local potatoes and carrots.
- No local apples, potatoes or carrots were found in the supermarkets surveyed.
- Supermarkets provided more organic fruit and vegetables than greengrocers and street markets but availability of home grown organic apples is still very poor.

Detailed Results

1. Supporting UK growers?

Apples

The amount of apple orchards in the UK halved between 1990 and 2000 and the number of apple growers fell from about 600 to 400 in the same time [3]. Planting an orchard is a long term commitment so to reverse this trend apple growers would need to be confident that they will have a market for their produce. With local shops closing every day (see below) and alternative outlets such as local food initiatives still in development many growers rely on supermarkets buying their produce.

Supermarkets claim to support UK growers, but the evidence for apples suggests otherwise. Tesco and Asda both say their policy is to source British wherever possible, and Tesco say that they are "selling more English apples than ever before, and working with growers to get more traditional varieties in stores". They claim that "at any one time there could be half a dozen English varieties on sale" [4]

However we found that as for the previous two years, the major supermarkets are importing large amounts of apples at the height of the UK season. The supermarkets surveyed had just 38% of their lines originating in the UK, with 43% from within the EU, and 16% from outside the EU, including USA, New Zealand, Chile, Australia, South Africa and Canada. Yet greengrocers are managing to provide 46% home grown apples.

The situation is even worse for organic apples with no UK organic apples available in Asda.

Percentage of apple lines sourced from UK, EU and non-EU (non-organic only) 2003

Outlet type	UK %	EU %	Non-EU%	Unknown %
Supermarkets (total)	38	43	16	3
Asda	32	36	29	3
Tesco	42	47	8	3
Convenience stores	27	39	19	16
Greengrocers	46	29	22	3
Market stalls (including farmers' markets)	62	16	15	8
Market stalls (without farmers' markets)	36	26	25	14

Percentage of supermarket organic apples sourced from UK, EU and non-EU (with 2002 figures for comparison)

Outlet type	UK %		EU %		Non-EU%		Unknown %	
	2003	2002	2003	2002	2003	2002	2003	2002
Asda	0	0	100	100	0	0	0	0
Tesco	23	10	18	79	56	10	3	0

Potatoes

It was reassuring to find that almost all maincrop potatoes surveyed across all outlets were home grown. Only four imported lines were found and these were all from within the EU.

Carrots

Again, by far the majority of carrots surveyed originated in the UK. The only lines that did not were specialised 'baby' carrots in Tesco, which originated in Holland in most cases, and Zambia in one case.

2. Consumer Choice – Varieties

Apples

With over 2,000 varieties of UK apples at the National Fruit Collection there should be a home grown apple to suit everyone's taste. However as in last year's survey supermarkets are boosting the choice they offer consumers by importing apple varieties rather than expanding their range of UK apples.

Supermarkets therefore appear to offer the widest range of apple varieties, with an average of 10 per store in Asda and 7 per store in Tesco. This compares to 6 in greengrocers and markets. However, when the average number of UK varieties is examined, it can be seen that the widest variety is available in markets (including farmers' markets), where an average of 5 per stall is found, as compared to 4 per store for Asda and 3 per store for Tesco. Overall 28 different UK apple varieties were found at markets across the country, with only an additional 3 varieties added by imports.

Total and average numbers of apple varieties stocked per shop/stall by outlet type (excluding organic)

Outlet type	Total number of varieties available in outlet type	Average number of varieties per store
Supermarkets (total)	22	8
Asda	14	10
Tesco	17	7
Convenience stores	14	3
Greengrocers	25	6
Market stalls (including farmers' markets)	32	6
Market stalls (without farmers' markets)	17	5

Total and average numbers of UK apple varieties stocked per shop/stall by outlet type (excluding organic)

Outlet type	Total number of UK varieties available in outlet type	Average number of UK varieties per store
Supermarkets (total)	14	3
Asda	9	4
Tesco	11	3
Convenience stores	8	2
Greengrocers	18	3
Market stalls (including farmers' markets)	28	5
Market stalls (without farmers' markets)	9	2

Potatoes

A wide range of potato varieties is available, 22 different varieties were noted in supermarkets around the country, but on average there were only 4 different varieties per store, with 2 per stall and greengrocer

Carrots

Carrots were not generally named by variety, but where the variety was named in supermarkets it tended to come at a premium (see below)

3. Consumer Choice – Organic & Local

Apples

Supermarkets do well on availability of organic produce, with organic apples available at around three-quarters of stores surveyed. However, they are not able to provide local produce, whereas ten per cent of markets and greengrocers provided local apples, jumping to nearly a quarter when farmers' markets were included in the data.

Potatoes

Again, supermarkets came out best for organic availability, with organic potatoes available in 44% of Asda stores and 64% of Tesco. However, Asda only offer one organic variety, while six organic varieties were noted in Tesco. Organic potatoes were available to a lesser extent at most other outlets too, even convenience stores. Again, supermarkets had no local produce available, while local potatoes could be purchased in three per cent of convenience stores, 19 per cent of greengrocers and 15% of markets, rising to 31% when farmers' markets are included.

Carrots

Again, organic carrots were easiest to obtain in supermarkets, where 66% of stores had organic lines available, but no local lines were stocked, while 5% of convenience and greengrocers stocked local carrots, and 21% of markets, rising to 29% when farmers' markets were included.

4. Pricing

The Government is keen to encourage everyone to eat more fruit and vegetables to improve the nation's health and it is also committed to tackling health inequalities. Access to a healthy diet at an affordable price must be key to achieving these aims. Asda and Tesco use low prices as their key promotional message to consumers. Big supermarkets certainly slash prices on key every day

processed goods such as sliced bread. But last year we found that apples were cheaper in greengrocers and markets than in supermarkets.

Friends of the Earth is concerned that for people on low incomes and especially those without cars access to local shops is essential to obtaining a healthy diet. Yet eight independent shops are closing every day [5]. As local shops close not only do people have to travel further, incurring further costs, to go shopping but they may also be paying more for healthy fresh produce when they get there.

Apples

When it comes to pricing of apples Asda and Tesco are not the cheapest places to shop, although Asda was cheaper than Tesco. The average price of a cox apple in the supermarkets surveyed was £1.18 per Kg, while in markets it was just 96p per kg. Even when farmers' market data is included, the average price is still only £1.02 per Kg. Greengrocers were also cheaper than Tesco, at £1.14 per kg. The same pattern occurred across most varieties – the average price for an apple in the supermarkets was £1.28 per kg, in greengrocers it was 1.21 per kg, and in markets (including farmers markets) it was £1.07 per kg.

Average price for non-organic cox and bramley apples by outlet type.

Outlet type	Cox £ per kg		Bramley £ per kg	
	2003	2002	2003	2002
Asda	1.02	1.27	1.34	1.16
Tesco	1.27	1.30	1.35	1.09
Convenience	1.37	n/a	1.37	n/a
Greengrocer	1.14	1.07	1.34	1.02
Market stalls (including farmers' markets)	1.02	n/a	1.13	n/a
Market stalls (without farmers' markets)	0.96	1.02	1.16	0.99

Potatoes

Pricing of potatoes is distinctly less variable than for apples. The average price for potatoes across all store types is 53p per kg. This is also the average price for supermarkets and greengrocers, with markets coming in slightly cheaper at 47p per kg. Convenience store potatoes were most expensive at 60p per kg.

Carrots

Markets and greengrocers offered the best value for carrots, although when 'added value' products such as ready sliced or baby varieties were excluded, supermarkets were as cheap as greengrocers, at 63p per kg, while markets were still slightly cheaper at 61p per kg.

At Asda and Tesco customers pay more to buy a named variety of carrot. Carrots labelled as 'Chantenay' in Tesco cost on average £1.96 per kg, and 89p per kg in Asda, compared to an average price of 50p per kg for un-named, standard carrots. Similarly 'bunched' carrots with green tops included come at a premium price of £2.06 per kg at Tesco. Size and convenience can come at an even higher price. 'Microwave in the bag' carrots in Asda pushed the price up to 1.67 per kg, while ready sliced carrots in Tesco cost £1.69 per kg. Mini carrots from Tesco cost 2.07 per kg, while Dutch baby carrots cost £4.54 per kg. And finally, Tesco's Kids Snack Pack Carrots cost an amazing £5.50 per kg, 13 times the price of Tesco 'Value' carrots while Asda's 'Snack Pack Carrot Crunchies' were 10 times the price of normal carrots.

Average prices for supermarket carrots

Supermarket	Range	Origin	Average price per kg
Tesco	Value	UK	0.44
Asda	Un-named	UK	0.45
Tesco	Un-named	UK	0.54
Asda	'Chantenay' variety	UK	0.89
Tesco	'Chantenay' variety	UK	1.96
Asda	Organic	UK	1.02
Tesco	Organic	UK	1.60
Asda	Microwave in the bag	UK	1.67
Tesco	Sliced	UK/Holland	1.69
Tesco	Bunched	UK	2.06
Tesco	Mini carrots	UK	2.07
Tesco	Baby carrots	Holland	4.54
Asda	Snack Pack Carrot Crunchies	Unknown	4.62
Tesco	Kids Snack Pack Carrots	Unknown	5.50
Tesco	Organic baby carrots	Zambia	5.56

ACTION NEEDED

Supermarkets should

- source more UK apples and more varieties when they are in season
- pay growers a fair price for their produce
- be more flexible about appearance standards so they can take more of the UK crop

Government should

- support local food initiatives in particular to help growers set up direct marketing ventures
- regulate to stop unfair trading practices of the supermarkets
- set up an independent watchdog to protect both consumer and producer interests

Consumers should

- buy UK apples when they are in season, and buy local and direct from the grower where possible.

NOTES

[1] previous survey results available on www.foe.co.uk/realfood

[2] Fruit Grower magazine (November 2003)

[3] English Apples and Pears 2001

[4] Radio 4 Food Programme, 19 October 2003

[5] The Grocer Yearbook 2002

Methodology

Volunteers from over 35 local Friends of the Earth groups visited stores and markets across the UK. Stores were visited in every English region (except NE) and in Wales and Northern Ireland. The

data was collected in early November when there should have been plenty of UK produce available.

Volunteers noted the country of origin for each line of apples, potatoes and carrots sold in each store or stall. We then measured the proportion of UK produce by counting the number of lines from the UK and compared this with lines from the EU and from outside of the EU. For example if a store sold three sorts of Coxes apples, of which one was from the UK and two were French this would be counted as one UK and two EU. Volunteers also noted the variety of the apples, potatoes or carrots if this information was available. Price data was noted in pence per kg.

Total number of stores visited

18 Asda stores

40 Tesco stores

58 supermarkets overall

36 convenience stores

37 greengrocers

33 markets, of which 10 were farmers' markets