Soft fruit is a staple for many UK consumers, and the British love affair with strawberries and raspberries is particularly prominent. According to Defra, consumption of strawberries and raspberries has risen by 150 per cent and 123 per cent respectively between 1996 and 2015, supported by perceived health benefits and improved availability. UK soft fruit purchases now account for 22 per cent of all consumer fruit purchases, according to primary market researcher Kantar World Panel. Volumes have continued to climb, with the market value of soft fruit grown in the United Kingdom worth £465 million in 2016, according to Defra’s agricultural report, estimated at £670 million in 2018. Yusuf Allinson from IBIS World assesses the current market picture.
A CROSS the United Kingdom, the planted area for soft fruit increased by eight per cent between 2014 and 2016, with over 80 per cent of strawberries, raspberries and blackberries grown under polytunnels. Although domestic consumption has been healthy, the effects of the EU referendum have posed problems for producers, with a shortage in seasonal labour leading to significant disruption in the 2017 harvest.

Consumption
Soft fruit consumption takes many forms including smoothies, fruit salads and as ingredients in other products including fresh fruit used to decorate cakes and pastries. The rise in fruit-flavoured ciders has also been a factor in the industry’s expansion. Most raspberries and strawberries are consumed fresh, although sometimes swimming in cream, taking centre court at Wimbledon. Homemade smoothies have become regular in many households, boosting soft-fruit purchases. IBISWorld estimates 13 per cent of soft fruit bought for home consumption is used to make smoothies. However, direct consumption still remains at the top of tree.

Away from home, the rise in the number of dedicated juice and smoothie bars in the United Kingdom has contributed to rising soft-fruit consumption, while the popularity of office deliveries and farmers’ markets has also been beneficial. Several online retailers now offer regular office deliveries as employers aim to boost productivity and encourage healthy eating among workers. Aply named companies such as Fruitful Office offer a range of workplaces a convenient service and are quick to point out the advantages of a healthy workforce, prompting companies to dump doughnuts. This has contributed to rising sales of soft fruit, and, according to Kantar World panel figures, sales of berries in the United Kingdom broke the billion-pound barrier for the first time in 2016.

The unseasonably warm weather in April stimulated sales in many supermarkets, with Tesco estimating sales of more than two million punnets of strawberries and 1.5 million punnets each of blueberries and raspberries over the week through until 22 April of this year (2018). Similarly, Asda revelled in a berry boost in sales, which propelled strawberries to a podium position among its 15 bestselling fruit and vegetables for 2018.

Retail: supermarkets
Supermarkets have responded to changing consumer diets by launching numerous marketing initiatives. According to the British Summer Fruits campaign, supermarkets have latched onto the importance of soft fruits, stocking full shelves and ensuring berries are easily accessible to consumers. This increased in-store prominence resulted in the sales value of soft fruit increasing strongly over the past five years, on occasion surpassing the value of vegetable sales. Cut-throat competition among major supermarkets, particularly with the rise of discounters Aldi and Lidl, has kept prices low for consumers for many years, also aiding demand. This has benefited soft-fruit consumption, as price remains a major determining factor when customers visit retailers – particularly given prevailing consumer uncertainty and pressures on disposable incomes in recent years.

In a bid to maintain a strong position in the market, supermarkets have formed partnerships with growers to provide own-brand soft fruit, with bold labels that state the origin of the produce. British consumers often value the superior taste of locally sourced produce, as the fruit may be picked at the optimal time, ensuring it is fresh and flavourful. This enhances the unique selling point of domestic growers and makes the prevailing consumer focus on provenance particularly
important to the soft-fruit industry. In light of this, Tesco, Sainsbury’s, Asda and many more have stocked their shelves with soft fruit punnets labelled as ‘British Grown’ or ‘Best of British’.

Despite this increase in production, the industry is still affected by seasonality and import availability, which influences revenue for domestic growers. For example, in April 2018, UK strawberry prices increased due to a supply shortage in Spain, which pushed up wholesale costs by 63 per cent compared with April 2017. Such fluctuations can affect consumer demand.

**Consumer tastes**

Concurrent with rising interest in provenance, there has been a rapid rise in demand for organic produce. Indeed, the amount of UK farmland converted to organic production increased 22 per cent in 2016. Organic produce is often sold at premium prices, which has prompted retailers to expand shelf space. Despite recent pressures on household income, many consumers prioritise health, ethical and environmental issues over price, which is expected to keep the industry on an upward trajectory over the current year.

Both organic and general soft-fruit consumption has been boosted by the rise of online-only retailers and farmers that sell directly to consumers. Online retailers such as Abel & Cole and Ocado allow customers access to a broad range of seasonal fruit delivered straight to their homes at their convenience, fitting in well with increasingly busy lifestyles.

Rising environmental concerns have also led to an increasing media focus on waste and wonky fruit. Soft fruit is particularly prone to wastage, with a recent survey by WRAP, a government advisory body, estimating that one in 10 UK strawberries end up as waste. Some fruit processors, such as Wonky Drinks Ltd, have played a starring role in

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**UK FOCUS | SOFT FRUIT**

ABOVE: IBISWorld estimates 13 per cent of soft fruit bought for home consumption is used to make smoothies

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**EXPERT VIEW**

**Alison Johnson**  
Managing Director, Food Forensics

“To manage risk effectively, it is imperative that the supply chain is robust”

**Tackling Risk in Frozen Foods**

Anything stable that can be easily stored and traded is a risk when it comes to traceability and authenticity.

WHEN frozen horsemeat was sold as beef and used in frozen beef burgers and ready meals, why were we surprised? Why would we think this was an isolated incident? Who cares? The consumer is the one who cares – and the consumer trusts the retailer and/or brand holder to have undertaken the due diligence and managed any risks on their behalf. Tesco and Findus found out the hard way what happens when this trust is betrayed.

The ability to store and trade frozen foods between wholesalers, countries and continents makes the frozen food category unusually high risk. Combine that risk with foods that are often eaten raw – frozen berries for instance – and we see the sort of challenges the US is facing with E.coli in Romaine lettuce.

To manage risk effectively, it is imperative that the supply chain is robust. We recommend isotope testing to validate origin – you may be comfortable with your Spanish supplier but what if they are supplementing your supply with Polish goods? You start to see how the risks can exponentially increase, even where you believe you have control of your supply chain.

If you are purchasing purées or in a form that is less identifiable, using Next Generation Sequencing to check for adulteration with other DNA containing product is helpful – is the asparagus purée pure asparagus, or has it been diluted with another green veg? Is the fruit purée made from the fruit you think?

Testing cannot replace paper traceability, but it is needed to validate it. Paper traceability alone is only paper thin. How well are you managing your risks? ■
reducing this, by using misshapen fruit in their juice. These companies can effectively address consumer concerns over wastage in the food sector and the importance of sustainable, domestic production.

Production
UK growers have responded accordingly by increasing land area dedicated to growing soft fruit, which has grown by 30 per cent over the past decade, according to Defra. Polytunnel growing is a key aspect of the British soft-fruit-growing industry; protecting crops, reducing the use of pesticides and extending the growing season. Development in polytunnel construction allows for near ambient temperature, improved ventilation and, often, better-quality plants. Climate-controlled glasshouses, which are more expensive, have proved even more successful at bringing forward harvest times and extending growing seasons, while different varieties of strawberry, such as ‘everbearing’ cultivars, can help provide fruitful harvests throughout the year. The current year saw the earliest-ever British strawberries, when fruit from Springfield Nursery in South Wales went on sale in Tesco and Aldi on 26 February 2018.

Brexit
Brexit has planted a few problem seeds for many growers. The weakness of the pound since the vote has gradually discouraged many seasonal workers from coming to the United Kingdom, as has the effects of an improving European economy and the perception that EU migrants are unwelcome. IBISWorld estimates that the average seasonal labourer from the European Union earned €412.82 per week prior to EU referendum. In the following year, seasonal workers earned 13.6 per cent less in Euro terms for the same hours, despite improvements in the national minimum wage. This contributed to almost a third of vacancies that were left unfilled during the crucial harvest month of September in 2017, according to the NFU.

Due to the delicate nature of strawberries and raspberries, harvesting remains a labour-intensive process. According to British Summer Fruits, 31,000 seasonal workers are required during the growing season. Polytunnel growing is a key aspect of the British soft-fruit-growing industry; protecting crops, reducing the use of pesticides and extending the growing season. Development in polytunnel construction allows for near ambient temperature, improved ventilation and, often, better-quality plants.
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annual harvest of soft fruit in the summer. Labour shortages were therefore highly detrimental to the crop, with Haygrove farms and G’s growers, a producer organisation, reporting that many of their members were faced with strawberries rotting in fields across the country. This prompted the National Farmers Union (NFU) to call for the re-introduction of the Seasonal Agricultural Workers Scheme, which ceased in 2013, as many growers grumbled about the disruption to their harvests in 2017. In addition to the direct effect of labour shortages, many farms are finding it difficult to plan for the 2018 harvest due to lack of clarity regarding UK-EU immigration policies. It remains uncertain if the government will reintroduce the Seasonal Agricultural Workers Scheme, but an expected shortage of labour, and consequently a rise in wages, is likely to lead to higher soft-fruit prices.

Increased capital investment, however, does hint at a solution to the problems posed by Brexit. The development of glasshouses and more sophisticated polytunnels has already facilitated increased production, and productivity could, in the near future, be further increased by the utilisation of automated picking systems. Innovate UK funds a number of relevant start-ups, with Dogtooth Technologies, a Cambridge-based firm, currently pilot testing a number of strawberry-picking robots. Such developments could lead to a significant reduction in the industry’s reliance on labour. Ultimately, however, the consumer outlook for the soft fruit industry remains strong, continuing its ascent within the wider fruit and vegetable sector. With consumers finding numerous ways to enjoy the fruits of farmers’ labour and supermarkets emphasising domestic provenance and sustainability, British producers are well placed to benefit from strong domestic demand for soft fruit, estimated to be worth over £1.6 billion in 2018.

Establishing – and optimising – anthocyanin levels in your berries

Seasonal berries, alongside a plethora of fruits and vegetables, are commonly associated with health benefits, including high levels of vitamins and minerals as well as antioxidants. One antioxidant that is found at high levels within a variety of seasonal berries is anthocyanin.

ANTHOCYANINS are water-soluble pigments that occur naturally in a range of fruits and vegetables. These pigments have been known to appear as red, purple or blue in food plants and hence are present in products where this is the naturally occurring colour (such as blueberries, raspberries, strawberries).

As with a number of antioxidants there have been various health links proposed for anthocyanins, such as having anti-inflammatory potential and even anti-cancer qualities – however there is no proven evidence for these benefits yet. Nonetheless there have been steps taken by food producers of anthocyanin-rich products to try and optimise the levels of naturally occurring anthocyanin.

It is well documented that variations in geography and weather can have a huge impact in harvest, which can reduce both the quality and taste of the product. Due to this, vast swathes of seasonal berries consumed by the UK are farm grown in optimal conditions. While this gives producers the opportunity to ensure quality in their product, it also allows for experimentation (such as variation in light sources, temperature etc.) into boosting those naturally occurring antioxidants such as anthocyanins.

Premier Analytical Services is able to offer analysis to support optimisation of seasonal berries in the form of an anthocyanin profile, as well as being able to offer guidance from our technical experts. In addition to anthocyanin analysis, PAS offers accredited analysis for water and fat-soluble vitamins and a range of minerals and metals.

“…there have been various health links proposed for anthocyanins, such as having anti-inflammatory potential and even anti-cancer qualities – however there is no proven evidence for these benefits yet”

YUSUF ALLINSON is an Industry Analyst at London-based market research firm IBISWorld, having previously achieved an Economics BSc at Royal Holloway. He specialises in the trends influencing the comprehensive UK agricultural sector.

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“There have been various health links proposed for anthocyanins, such as having anti-inflammatory potential and even anti-cancer qualities – however there is no proven evidence for these benefits yet”