Media Briefing

November 2002

British apples for sale

Markets and greengrocers have more for less

British apple growers have told Friends of the Earth that supermarkets do not give enough shelf space to their fruit, that they 'de-list' traditional varieties of British fruit and that they do not pay growers a fair price for their produce [1]. We put these claims to the test in a survey of supermarkets, greengrocers and markets.

Firstly we set out to find out how much fruit each of these outlets imported at the height of the British apple season. We gathered sourcing information from 166 supermarkets, 74 greengrocers, and 48 market stalls. Greengrocers and market stalls offered a higher proportion of British apples. Comparing the results to a similar survey we carried out last year we found there had been no improvement in the proportion of British fruit sold by supermarkets. The average percentage of British apples sold remains at about 40%.

We also looked at how many varieties of apple were on offer. Supermarkets claim to offer consumers choice but where they did offer a wide range of apple varieties this was mainly due to imports, they only offered at most three varieties of British apple – as did greengrocers and market stalls.

We also looked at retail prices for Cox and Bramley apples and compared this to the farmgate price (ie the amount paid to the farmer). The results show a significant mark up on fruit on the supermarket shelves. We also looked at the difference in price to the consumer by comparing supermarkets with greengrocers and market stalls. Supermarkets were found to be the most expensive.

The survey confirms that supermarkets are not providing what consumers want when it comes to supporting British producers. An opinion poll commissioned by Friends of the Earth [2] in early November reveals that most of the British public think supermarkets are giving farmers a raw deal. Almost two thirds (63%) think farmers are not paid enough by supermarkets for the food they produce. And more than four fifths (84%) want the supermarkets to give preference to UK products over imported products when in season.

Key results

- The average proportion of British apples in supermarkets was 39%, showing no improvement on last year's results (tables 2 and 3).
- With the exception of Marks & Spencer, which managed an average of 56% British apples,

Contact:

Your name Tel: **Mobile:**

Other contact Tel: **Mobile:**

26-28 Underwood Street London N1 7JQ
Media contact 020 7566 1649 (24 hour) Fax 020 7490 0881 Email press@foe.co.uk Website www.foe.co.uk

less than half the apples sold in the major supermarkets were British (see table 2).

- In Co-op, Morrisons and Safeway stores, less than a third of apples on average on offer were British (see table 2).
- A significant proportion of apples were imported from outside the EU, eg. from New Zealand, Australia and USA.
- Of the supermarkets, only Waitrose, Tesco, Safeway and Sainsbury sold any British organic apples (table 5).
- Supermarkets, greengrocers and markets only offer on average three varieties of British apples (table 6).
- Supermarkets offer on average eight varieties of apples from all countries of origin. Waitrose offers 12 varieties (table 7).
- Both Cox and Bramley apples are cheaper in greengrocers and on market stalls than in the supermarket (see table 8).
- There is a significant mark up between the price the grower gets and the price on the supermarket shelf (see table 9)
- Only market stalls and greengrocers sold local produce. Where supermarkets did state county of origin none were local.

Methodology

About 100 volunteers from over 40 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. Pricing data were collected from fewer stores than sourcing data. The data was collected in late October at the height of the British apple season.

Volunteers noted the country of origin for each line of apples sold in each store or stall. We then measured the proportion of British apples by counting the number of 'lines' of apples from the UK, and compared this with lines from the EU and from outside of the EU. For example, if the supermarket sold three sorts of Coxes apples, of which one was British, and two were French, this would be counted as one UK and two EU. For the retail pricing data, volunteers purchased British Cox and Bramley apples and sent us the receipts. The farm gate price data was obtained from the Department of the Environment, Food and Rural Affairs (DEFRA) and from a marketing group via a grower.

Table 1: Total number of stores visited

	Number of stores visited
Greengrocers	**74**
Market stalls	**48**
Supermarkets	**166**
Marks & Spencer	9
Waitrose	14
Tesco	34
Asda	10
Somerfield	20
Sainsbury's	30
Safeway	22
Morrisons	4

Contact:

Your name Tel: **Mobile:**

Other contact Tel: **Mobile:**

26-28 Underwood Street London N1 7JQ
Media contact 020 7566 1649 (24 hour) Fax 020 7490 0881 Email press@foe.co.uk Website www.foe.co.uk

Co-op	23

Results – sourcing

Supermarket League Table
We found that in most supermarkets less than half the apples were from the UK. Only in Marks & Spencer were more than half (56%) the apples on sale British. The Co-op had the fewest British apples on offer (28%). Safeway and Morrisons also had less than a third

The majority of apples on sale at the height of the British season were imported, and in many cases apples were sourced from outside the EU. Marks & Spencer, Asda, Somerfield, Sainsbury's and Morrisons all sourced more than 20 per cent of their apples from outside the EU, eg New Zealand, Chile, South Africa, USA, Canada, and Australia. Transporting apples over such large distances in the British season makes no sense. Apples shipped from New Zealand clock up over 20,000 kilometres, travelling almost as far as the average UK family car does in the course of a year.

Table 2: percentage of apple lines sourced from UK, EU, Non-EU in supermarkets 2002:

Supermarket	**UK %**	EU %	Non-EU %
Marks & Spencer	**56**	18	25
Waitrose	**45**	43	11
Tesco	**43**	41	16
Asda	**40**	32	27
Somerfield	**39**	39	21
Sainsbury's	**33**	35	29
Safeway	**32**	60	7
Morrisons	**31**	40	29
Co-op	**28**	55	16
Average	**39**	40	20

NB apples of unknown origin not shown

Table 3: 2001 results (for comparison)

Supermarket	**% UK**	% EU	% Non-EU
Waitrose	**66**	14	17
Asda	**44**	38	17
Somerfield	**43**	44	9
Sainsbury's	**40**	43	16
Marks & Spencer	**37**	43	20
Co-op	**31**	53	13
Safeway	**31**	37	29
Tesco	**30**	50	19
Average	**40**	40	17

Supermarkets vs markets and greengrocers

Contact:

Your name Tel: **Mobile:**

Other contact Tel: **Mobile:**

26-28 Underwood Street London N1 7JQ
Media contact 020 7566 1649 (24 hour) Fax 020 7490 0881 Email press@foe.co.uk Website www.foe.co.uk

We found that market stalls offered the best chance of buying UK apples, followed by greengrocers. Supermarkets fared much worse in comparison.

Table 4: percentage of apples sourced from UK, EU, non-EU by outlet type:

Outlet type	**UK%**	EU%	Non-EU%
Market	**55**	25	16
Greengrocer	**50**	29	19
Supermarket	**39**	40	20

Organic apples
The situation was even worse for organic fruit. Most supermarkets failed to offer any British organic apples. For example, only eight lines of organic apples were found in the Co-ops visited, seven of these were from New Zealand. Only seven greengrocers and three markets sold any organic apples although a high proportion of these were British.

Organic British apples are likely to be harder to source than non-organic due to the lack of orchards converted to organic production in the UK. Organic Aid Rates for conversion of all types of horticulture have historically been significantly lower than in other EU countries [3] although this is set to change with the Government's Organic Action Plan. The Action Plan is intended to increase the conversion grant for top fruit.

Table 5: percentage of organic apples sourced from UK, EU, Non-EU and unknown origin in the main supermarkets:

Supermarket	**UK %**	EU %	Non-EU %	Unknown %
Waitrose	**38**	17	56	0
Sainsbury's	**21**	54	23	2
Tesco	**10**	79	10	0
Safeway	**5**	57	33	5
Asda	**0**	100	0	0
Morrisons	**0**	100	0	0
Somerfield	**0**	100	0	0
M&S	**0**	20	80	0
Co-op	**0**	12.5	87.5	0

Consumer Choice? - Apple Varieties
In Friends of the Earth's recent survey of apple growers, several growers told us that supermarkets de-list particular varieties of UK apples. There used to be thousands of varieties of apples grown in the UK, including many locally distinctive varieties suited to the local climate and soil. The National Fruit Collection at Brogdale in Kent has more than 2,300 different varieties of apple. The supermarkets, greengrocers and market stalls surveyed all offered an average of three British varieties of apple.

Table 6: shows average number of varieties stocked per shop/stall by outlet type

Outlet type	**Average no. of UK varieties**	Average no. of varieties per

Contact:
Your name Tel: **Mobile:**
Other contact Tel: **Mobile:**

26-28 Underwood Street London N1 7JQ
Media contact 020 7566 1649 (24 hour) Fax 020 7490 0881 Email press@foe.co.uk Website www.foe.co.uk
Friends of the Earth Limited Registered in London No 1012357

	per shop/stall	shop/stall (all countries)
Greengrocer	**3**	5
Market	**3**	5
Supermarket	**3**	8

However, when imported varieties are included, the supermarkets stock more varieties of apple on average than greengrocers and market stalls. Supermarkets seem keen to promote 'new' varieties of imported apples, while de-listing traditional British varieties. The supermarkets offer on average about eight varieties of apple. Waitrose offered the widest choice, with an average of 12 varieties of apples in its stores.

Table 7: average number of UK varieties stocked per store at each of the main supermarkets

Supermarket	**Average no of UK varieties per store**	Average no of varieties per store (all countries)
Waitrose	8	12
Morrisons	6	11
Sainsbury's	5	10
Asda	4	9
M&S	4	8
Safeway	3	8
Somerfield	3	8
Tesco	3	7
Co-op	2	6

Results - Pricing

Our survey revealed that supermarkets are the most expensive places to buy apples. For example on average a kilo of Cox apples costs 43 pence more in a supermarket compared to a market stall.

Table 8: average price for UK non-organic cox & bramley in different types of outlet

Outlet type	**Cox £ per kg**	**No of outlets**	**Bramley £ per kg**	**No of outlets**
Supermarkets	1.45	140	1.22	137
Greengrocer	1.07	51	1.02	58
Market	1.02	39	0.99	29

NB – no of outlets differs for bramley & cox as not all sell both
Data on prices in individual supermarkets is available on request

What the Grower gets - Farm Gate Price

We obtained average farmgate prices from DEFRA for October 2002 which suggest a significant mark up between the farmgate and the supermarket shelf. The DEFRA figure is an average for all apples sold via different outlets, so partly reflects the lower prices paid for processing. We also obtained figures from a marketing group, via a grower, which show the price paid by supermarkets in October 2002. However this price does not take into account the fact that in order to supply a

Contact:
Your name Tel: **Mobile:**
Other contact Tel: **Mobile:**

26-28 Underwood Street London N1 7JQ
Media contact 020 7566 1649 (24 hour) Fax 020 7490 0881 Email press@foe.co.uk Website www.foe.co.uk

supermarket the grower has to meet the costs of grading, packaging and transport. Once these costs are deducted the DEFRA figure is a fairer representation of what a grower actually takes for a kilo of apples from a supermarket.

Table 9: Farm gate and retail price for Cox apples, October 2002

Average supermarket retail price (140 stores)	£1.45
Average supermarket price to grower* (from marketing group)	£0.92
Average farmgate price (from DEFRA)	£0.33

*out of this total price, the grower must pay for grading, packaging and transport of his/her apples

It is not possible to obtain prices paid to farmers by individual supermarkets. However the Competition Commission inquiry into multiple retailers found that Tesco paid the lowest prices to its suppliers.

Other information – local sourcing
Only market stalls and greengrocers sold local produce. Where supermarkets did state county of origin none were local.

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.

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] Friends of the Earth survey of apple growers published October 2002, details available from media unit
[2] NOP omnibus carried out the survey between 8th and 10th November, details available from media unit
[3] Comparative figures given in the report of the House of Commons Agriculture Committee into Organic Farming (2001)

Contact:
Your name Tel: **Mobile:**
Other contact Tel: **Mobile:**

26-28 Underwood Street London N1 7JQ
Media contact 020 7566 1649 (24 hour) Fax 020 7490 0881 Email press@foe.co.uk Website www.foe.co.uk