IRO Canada 2012

The United Kingdom

Tim Place – England

Place uk

perfect produce - naturally

Oliver Thomson - Scotland

TRADE SOLUTIONS - (SCOTLAND) - LTD

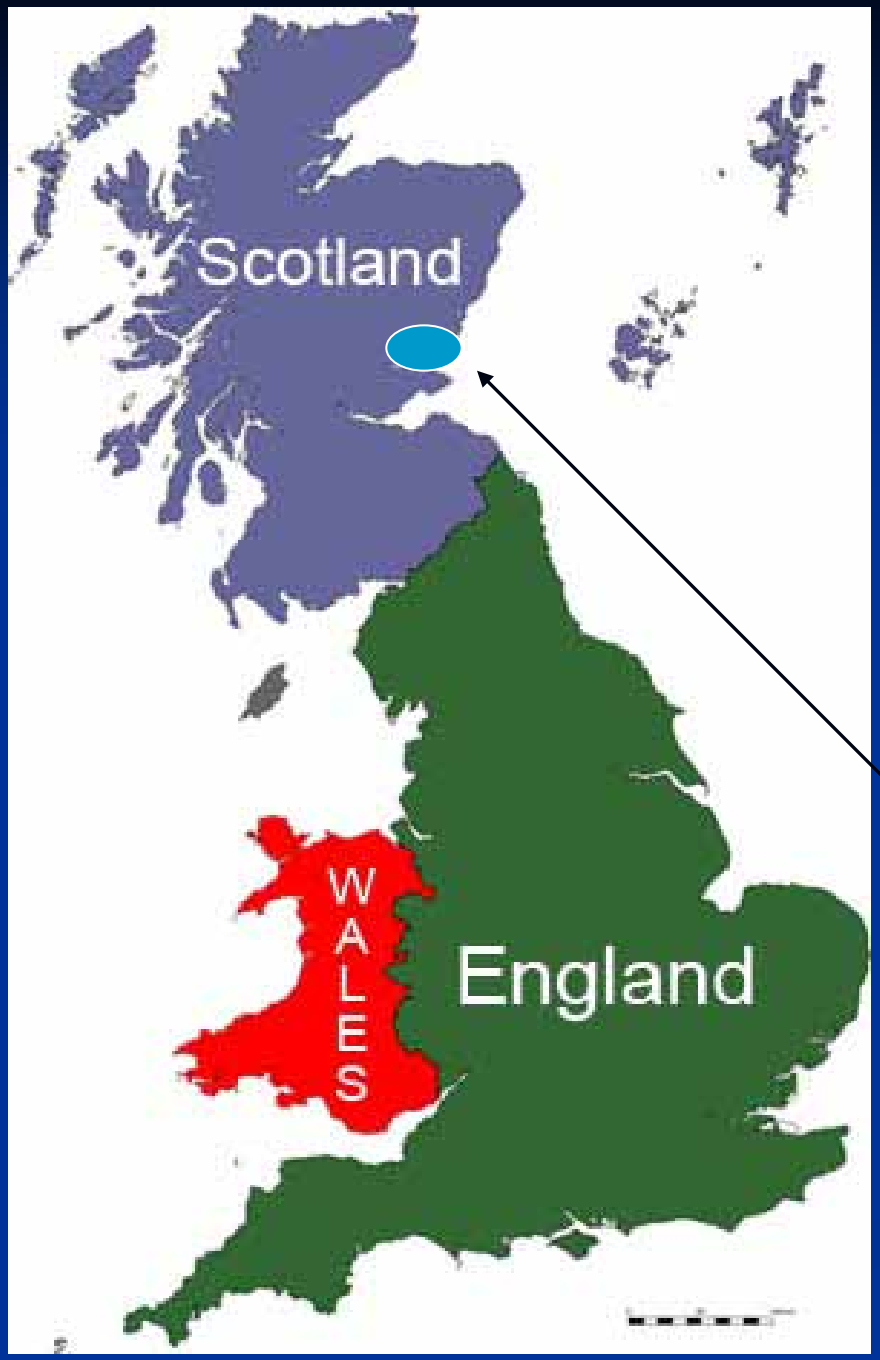
SCOTTISH SOFT FRUIT PROCESSORS

Introduction

- Tim Place
- I am Managing Director of Place UK Ltd.
- We are Soft fruit growers, processors and traders
- We grow soft fruit in the East of England
- We market our fruit fresh to UK supermarkets as a member of Berrygardens Cooperative (45% of UK fresh sales)
- We sell Frozen fruit direct to UK manufacturers.
- We purchase frozen fruit from abroad..

Introduction

- Oliver Thomson
- Director of Trade Solutions (Scotland) Ltd
- Trade Solutions (Scotland) Ltd is a fruit processing and trading company
- We supply processed fruit products to Manufacturers in the UK and Europe
- We process British fruit products, but also import fruit into the UK..



The fruit Growing Region is concentrated in a small area in Scotland.

The majority of the production is in the Strathmore valley, which has an ideal climate for soft fruit production.

The Valley of Strathmore

Scottish Production trends

- The majority of Soft fruit in England and Scotland is grown for the domestic fresh market.
- 20 years ago 80% of Raspberries grown were for the processing industry and 20% for the fresh market.
- 2009 80% of Raspberries grown in Scotland are for the Fresh market and 20% for processing.
- There is around 100 HA of Raspberries grown specifically for processing which is all machine harvested.
- The remainder of fruit for processing comes from out graded fruit grown for the fresh market..

- Eating seasonably is also a great way of eating more sustainably. The fruit and vegetables we consume in the UK have the same carbon footprint as driving round the world a million times in a Hummer or taking 4 million return flights to Australia (according to the Energy Trust). Growing fruit and veg in season requires lower levels of artificial inputs like heating, lighting, pesticides and fertilisers than at other times of the year and so has a lower environmental impact.

  With reduced transportation and production costs for the producers, seasonable fruit and veg will have less of an impact on your grocery bills too. Also when produce is in season, it is more abundant and this helps to keep the price down. A basket of fruit and veg bought in season can be as much as a third cheaper than the same basket bought out of season.

  Try eating seasonably this summer and experience the joy of eating fruit and vegetables at their peak of perfection – better tasting, better for the environment and better yet – better value.

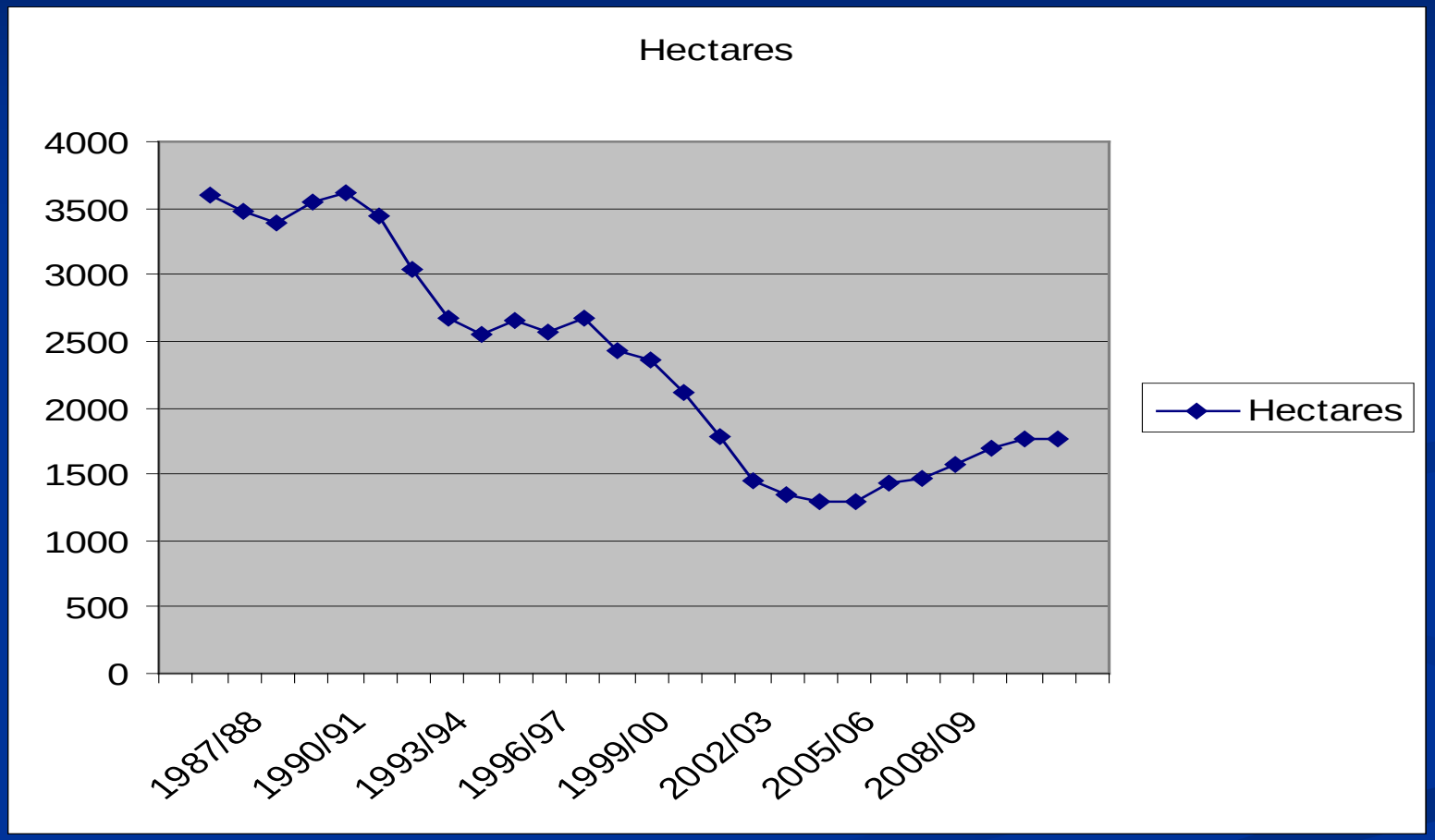
UK Raspberry production

	Area	Volume	Value
2006	1434 Ha	12200 t	£5772/t
2010	1770 Ha	17000 t	£6033/t

- Over 5 years
- Area increased by 23%
- Tonnage has increased by 39%
- Value/t has increased by 4.5%..

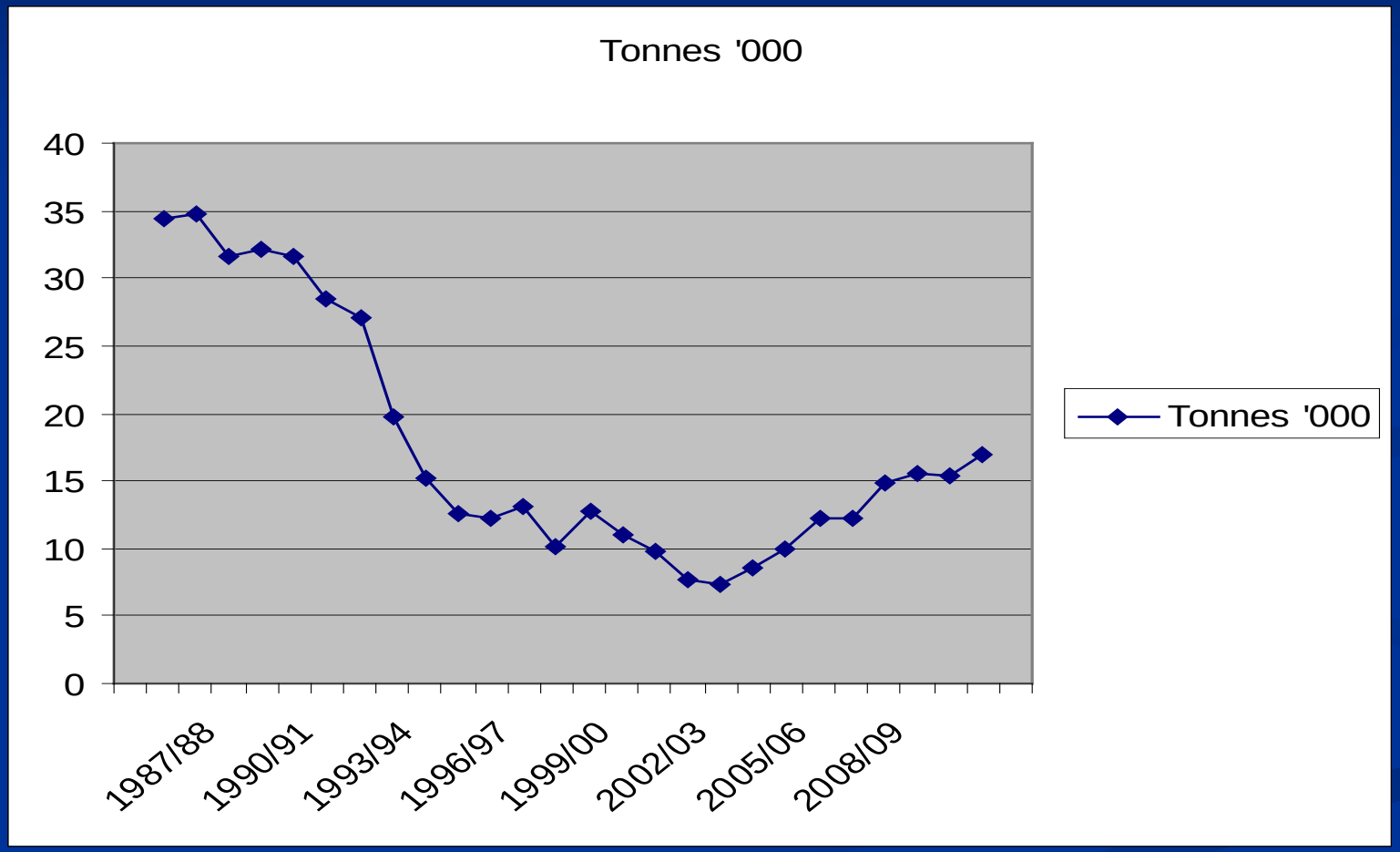
Source: DEFRA

UK Raspberry Area



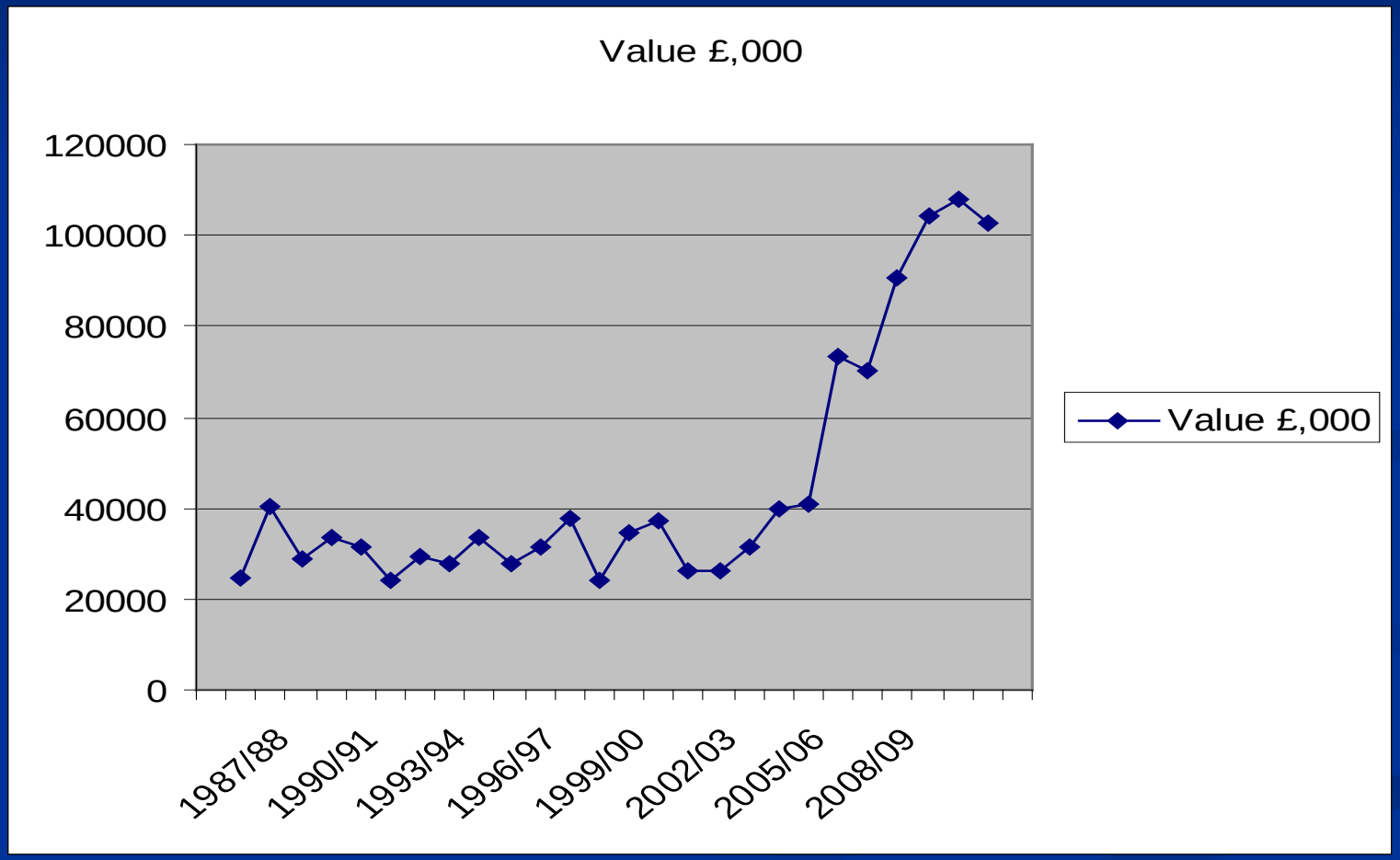
Source : DEFRA

UK Raspberry production volume



Source: DEFRA

Value of UK grown Raspberries



Source: DEFRA

UK Markets

- <u>Fresh approx 95%</u>
  - Supermarkets
  - Wholesale markets
  - Farm Shops and Pick your own

- <u>Frozen approx 5%</u>
  - Supermarkets
  - Manufacturers – Deserts, Jams, Yoghurts, Juices..

UK Varieties

- Glen Ample
- Tulameen
- Octavia
- Driscoll's Maravilla
- Driscoll's Cardinal

- Priority is Taste and Shelf life for fresh sales..

Tulameen

Maravilla

New varieties

- The Scottish Breeding program

- Marketing group exclusive
  - Berrygardens – Driscoll's
  - Berryworld – Edward Vinson

New primocane varieties are replacing the traditional floricane cultivars..

Raspberry variety trials

UK Growing Systems

- Soil or pots
- Soil sterilisation
- Raised plastic covered bed
- Post and wire, with lateral supports
- Trickle irrigation (Clean water)
- Polythene tunnels
- Hand picking into retail punnet..

Substrate grown crop

Accreditation

- Assured produce
- Nurture – Tesco
- Leaf – Waitrose
- Field to Fork – M & S
- BRC
- SEDEX

Growing Problems

- Loss of chemicals
- Water restrictions
- Planning restrictions on Poly tunnels
- Labour
- Phytophthora
- Vine Weevil, Raspberry beetle
- Spotted winged Drosophila (SWD)?

Phytophthora damage

Fresh Packing

- Fast cooling within 2 hours of picking to below 4 Centigrade
- Inspection and weighing to average weight
- Heat sealing
- Dispatch to Supermarket..

Heat Sealing

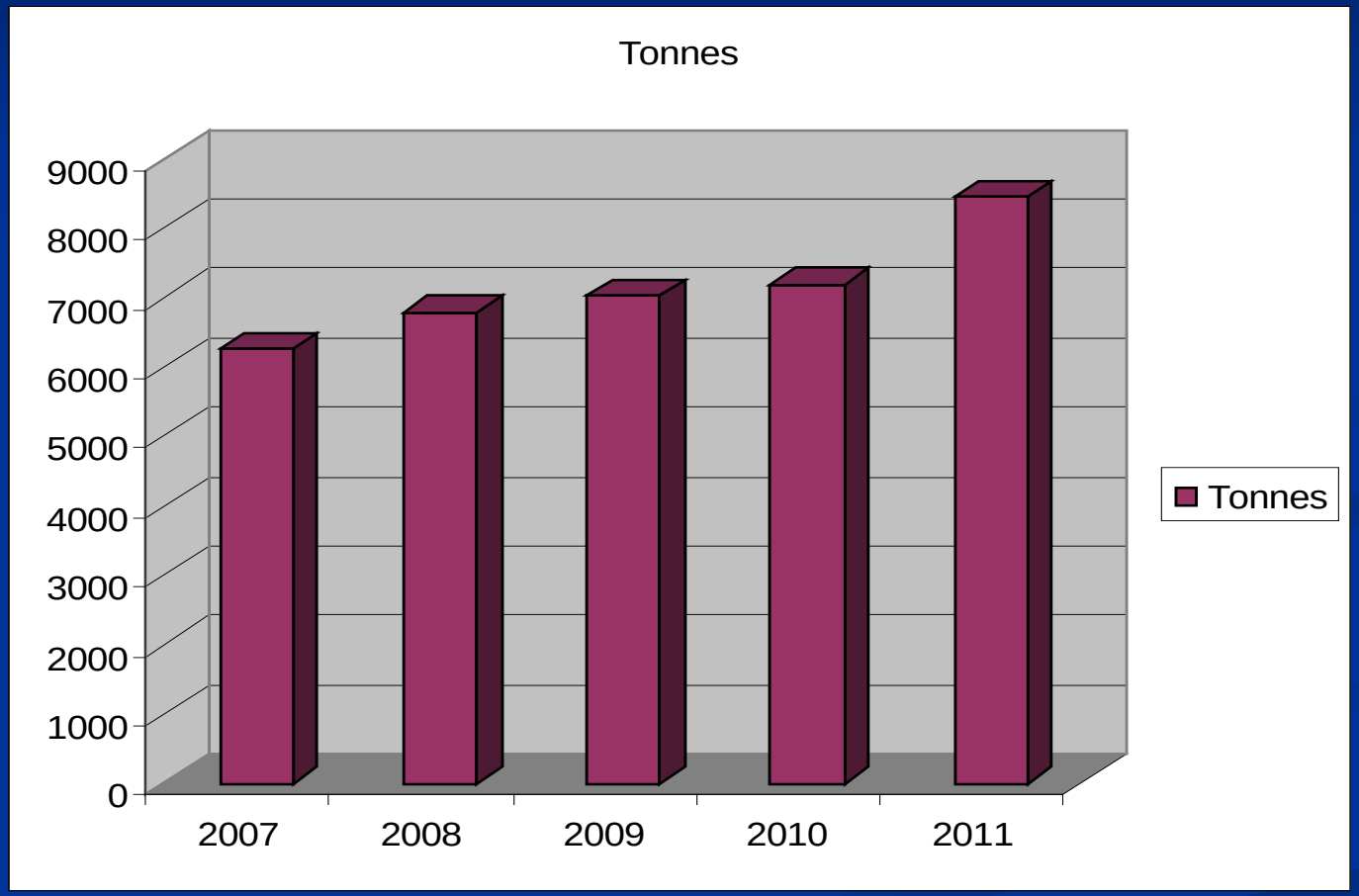
Heat sealed punnet

Fresh Raspberry Market information

- 2011/12 Retail value £144 million
- 33% of the population purchase fresh raspberries.
- Turnover growth +12.8%
- Volume growth +7%
- The average customer bought raspberries 6.7 Times in the last year..

Source Kantar World Panel

Fresh sales of UK grown fruit



Source BSFL

Processed fruit Volumes

- The majority of British processing grade Raspberries are used in the production of juice and Puree for use within the UK
- A large proportion of IQF produced is sold through Supermarkets as a “frozen pack”
- Limited amounts of British IQF Raspberries are sold for manufacturing.
- Most of the IQF Raspberries used in the UK are imported from Serbia, Chile and Poland
- A large proportion of the Concentrate and Puree used in the UK is imported from Poland..

Raspberries being Machine Harvested

Processed fruit Trends in the UK

- Price is still King
- Quality and traceability
- Origin is becoming increasingly important as a marketing tool, as consumers are becoming more interested and aware of how things are produced.
- Fewer growers, but larger scale farms means “single farm” and “single variety” products are available in commercial volumes.
- Single variety products are becoming increasingly popular..

Raspberry Processing Companies in the UK

- There are very few Raspberry processors in the UK.
- Among them are:

pixley berries
for the joy of juice

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UK Exports

	2010	2011	
Fresh	84t	95t	to Irish republic
Frozen	178t	156t	to France, Irish rep., Serbia

Source: HM Revenue & Customs

UK 2011 Fresh Imports

	Tonnes	Value £000s	£/t
Spain	5821t	£35,752	£6142/t
Morocco	1228	£3,516	£2863/t
Netherlands	427	£1,319	£3089/t
South Africa	531	£4,901	£9230/t
USA	239	£1,687	£7059/t
France	273	£782	£2864/t
Belgium	229	£1,535	£6703/t
Portugal	79	£275	£3481/t
Mexico	23	£154	£6696/t
Germany	111	£680	£6126/t
Other	55	£116	£2109/t
TOTAL	9018t	£50,716	£5624/t

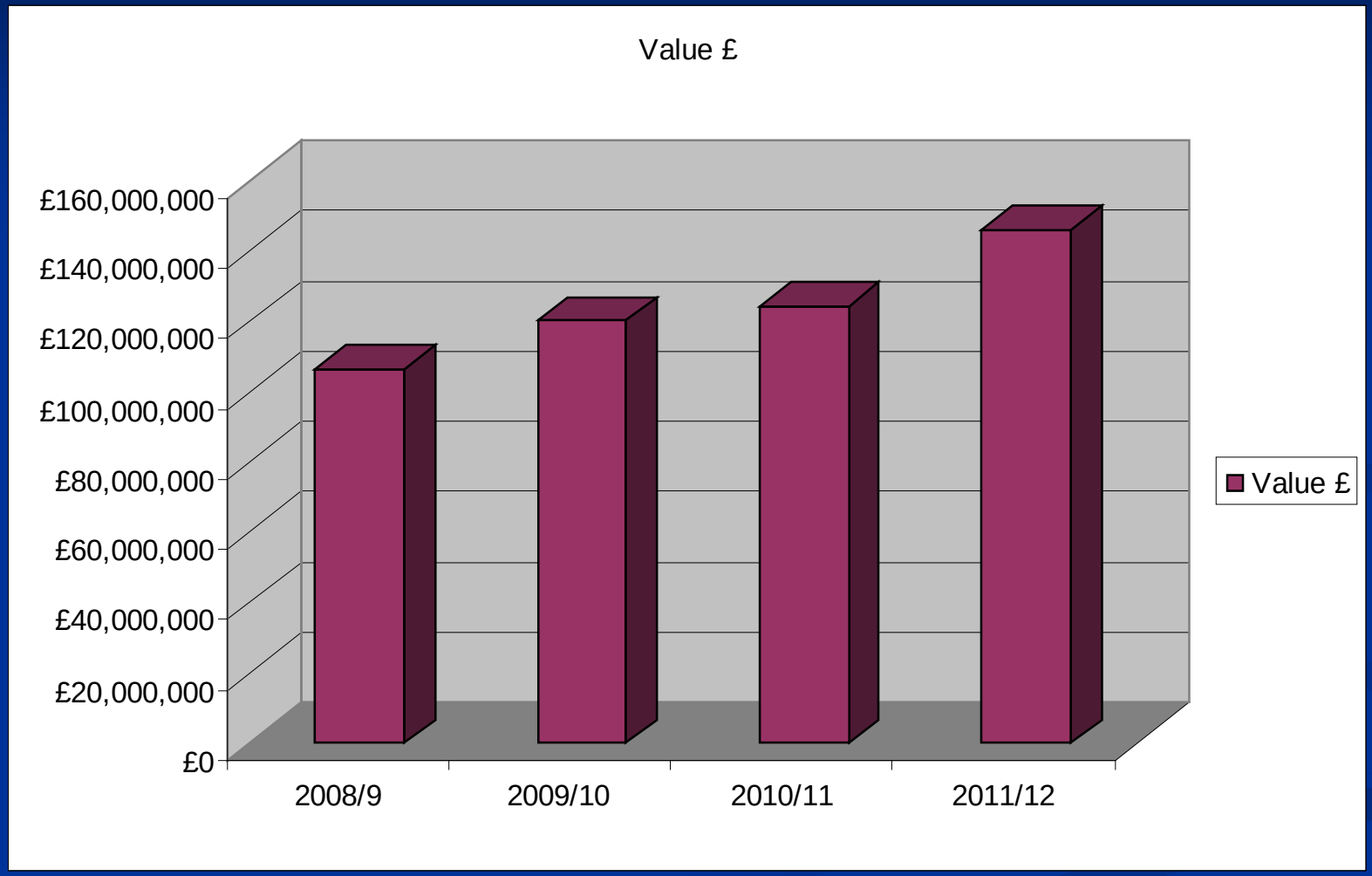
Source: HM Revenue & Customs

UK 2011 Frozen Imports

	Tonnes	Value £000s	£/t
Chile	1833t	£3,204	£1748
Netherlands	1475t	£2,041	£1384/t
Poland	1661t	£2,965	£1785/t
Belgium	1023t	£2,078	£2031/t
Serbia	1725t	£2,822	£1636/t
Germany	512t	£1,474	£2879/t
Bulgaria	117t	£193	£1650/t
France	122t	£305	£2500/t
Cyprus	184t	£225	£1223/t
Other	25t	£43	£1720/t
TOTAL	8678t	£15,351	£1769/t

Source: HM Revenue & Customs

4 Year Fresh Sales Growth



Source – Kantar World Panel

Summary

- The UK now grows mainly for the fresh market – Good flavour and shelf life. (only surplus fruit is frozen)
- Health eating is encouraging the market to continue to grow.
- New autumn fruiting primocane varieties are extending the season - June to October
- All raspberries are protected with polytunnels..

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