



FCRN – Fruit & Vegetable Seminar

Sector Overview

FRESH PRODUCE CONSORTIUM





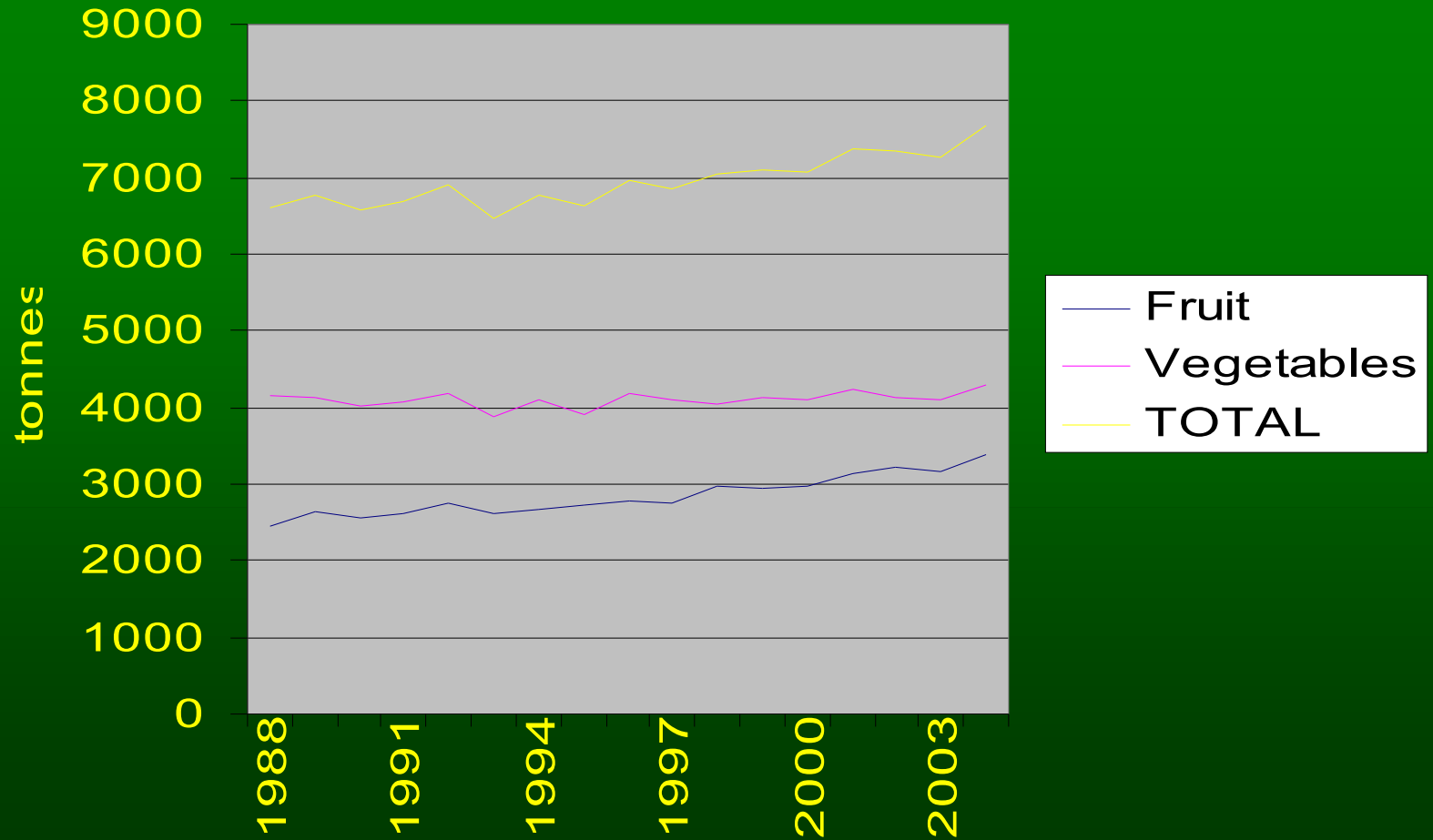
MARKET OVERVIEW

Estimated total turnover of industry equates to approximately £7.2 billion

- Retail Sector – 59%
- Wholesale/Food Service – 41% (£2.9b)
- Significant position for development IGD eating out
- 'consumption of meals, eaten out of the home, has doubled since 1992, and is expected to represent 50% of all food consumed in the UK by 2025' (source IGD)

Information is based on various sources and indicates trends only

Total UK Market / Volume

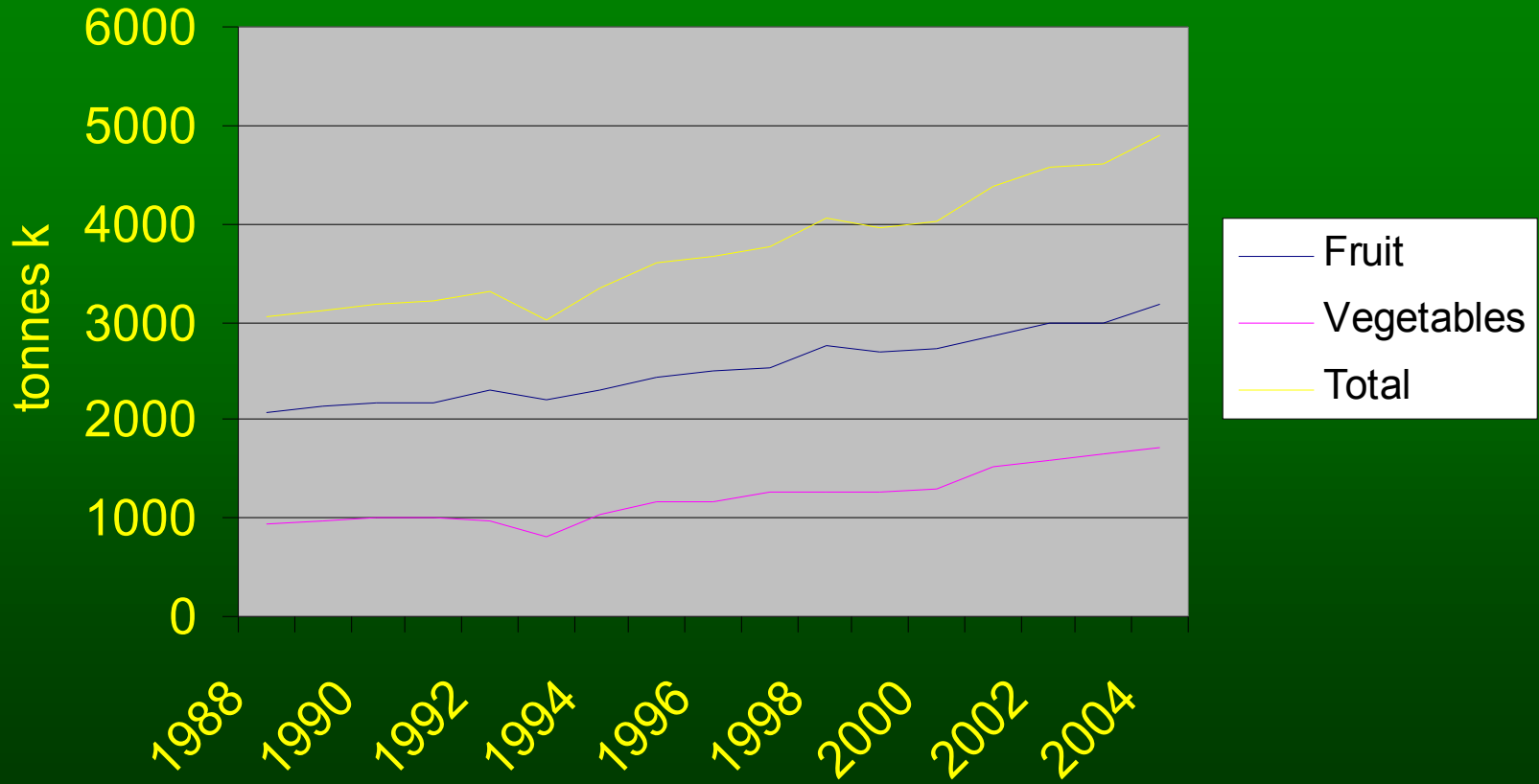


Total UK Market / Volume

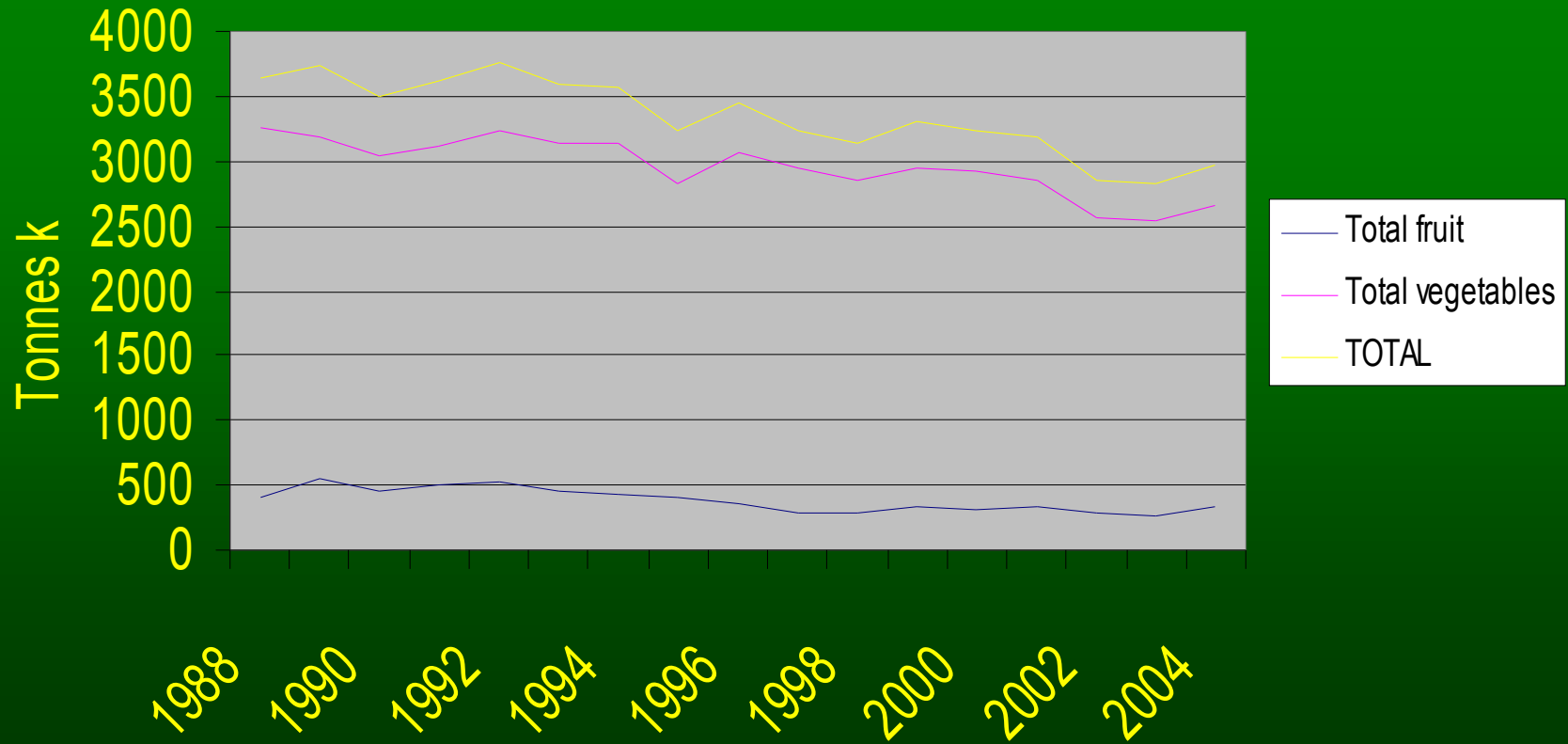
<u>Total market - volume (tonnes k)</u>											
		1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Fruit		2725	2773	2745	2979	2948	2979	3125	3208	3172	3390
Vegetables		3911	4193	4110	4059	4142	4088	4240	4135	4093	4300
TOTAL		6636	6966	6855	7038	7090	7067	7365	7343	7265	7690



UK Market Imports



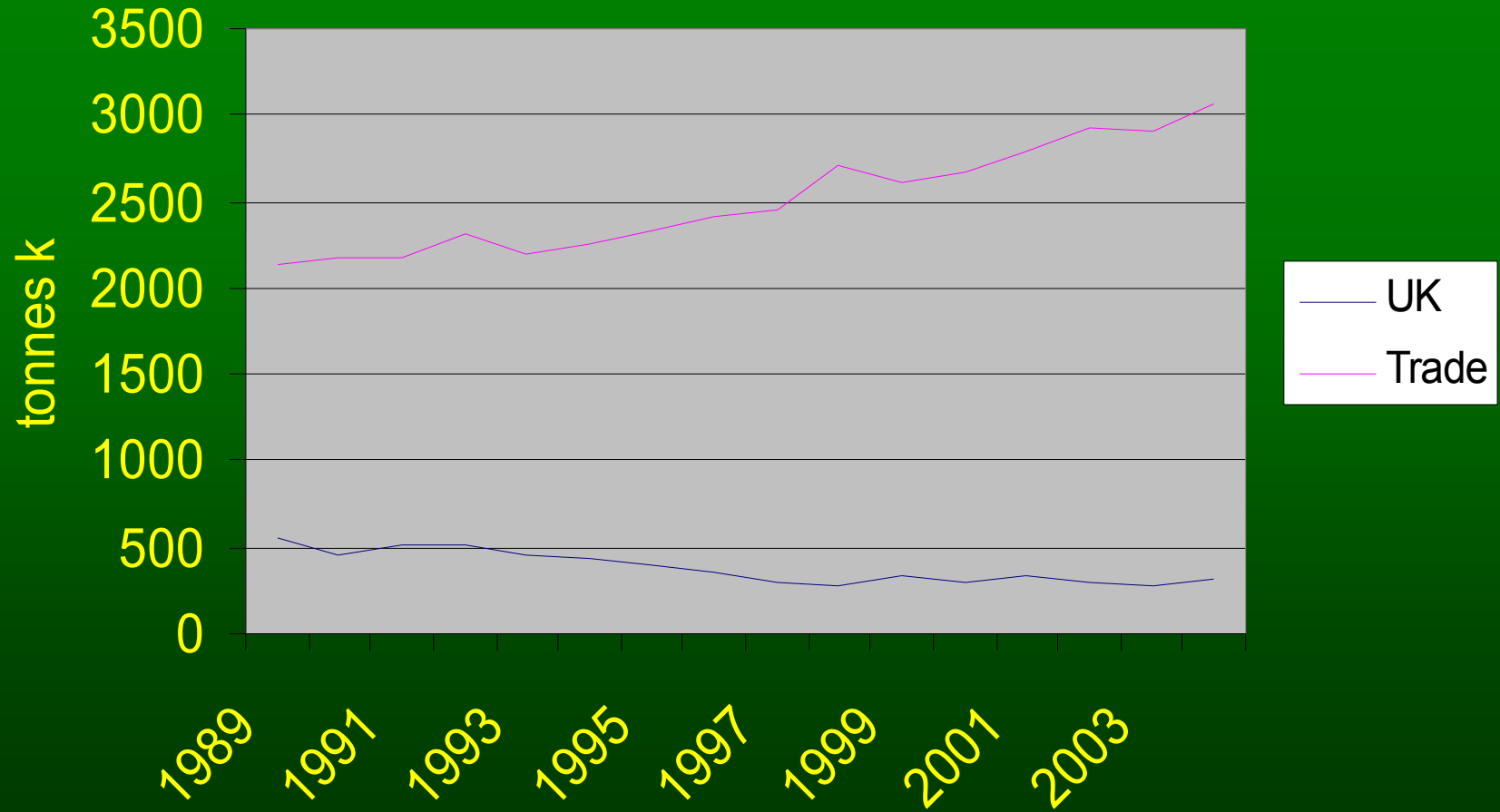
UK Production



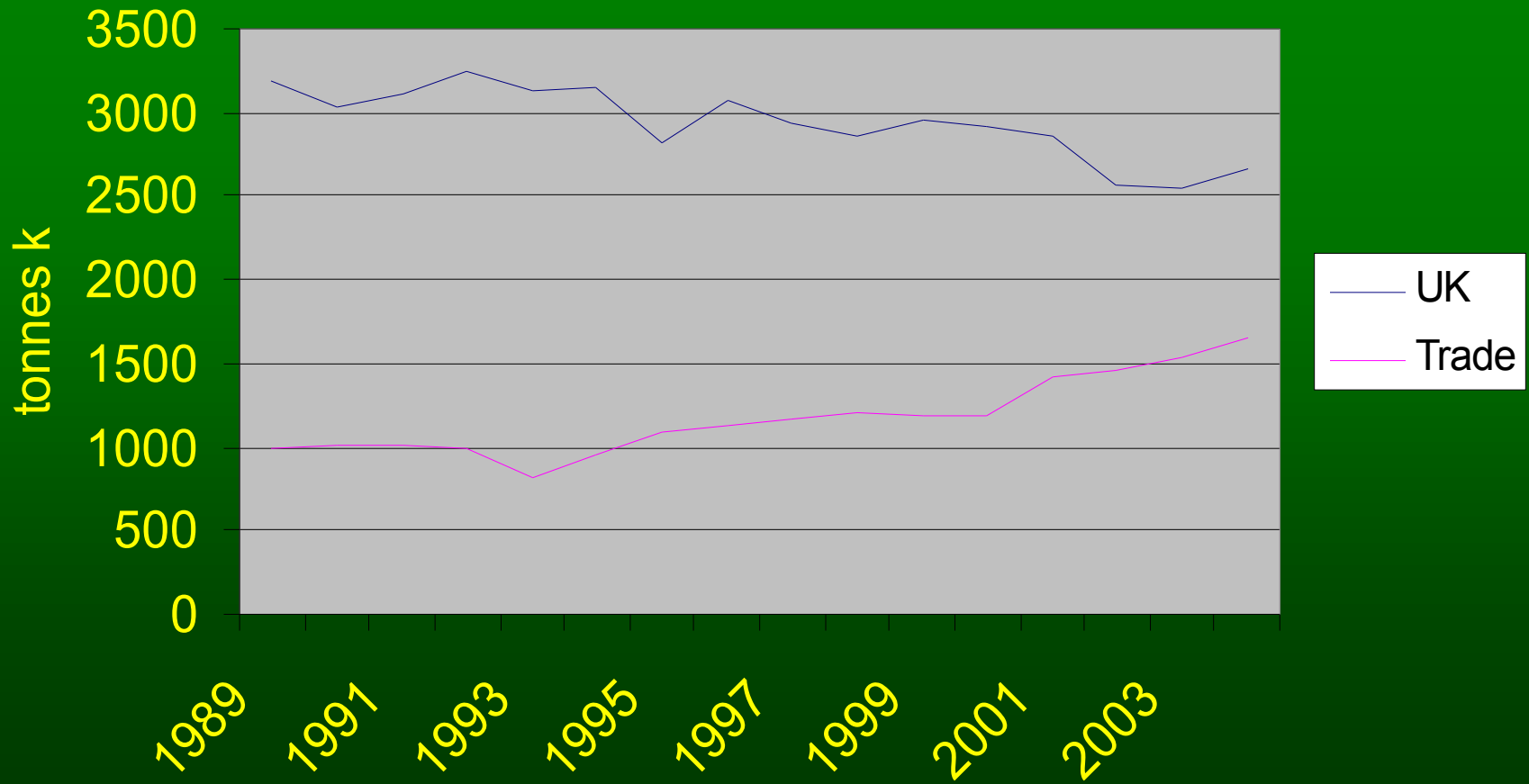
UK Production

UK production (tonnes k)		1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Fruit											
	Dessert apples	139	105	96	98	134	101	104	84	69	96
	Culinary apples	135	118	91	86	112	108	107	95	75	108
	Pears	30	36	33	26	23	27	39	34	30	23
	Plums	14	20	12	6	9	5	15	12	15	14
	Cherries	4	4	1	1	1	1	1	1	1	1
	Soft fruit	76	81	59	60	66	63	64	63	78	83
TOTAL FRUIT		398	364	292	277	345	305	330	289	268	325
Vegetables											
	Roots and onions	1023	1222	1272	1263	1374	1422	1451	1288	1254	1299
	Brassicas	711	739	649	615	590	539	496	452	463	558
	Legumes	298	319	283	259	247	276	234	230	222	210
	Tomatoes	113	116	114	108	117	113	109	101	76	79
	Cucumbers	88	86	82	84	84	80	72	74	77	61
	Lettuce	223	216	183	173	175	155	145	126	142	136
	Mushrooms	102	107	107	110	105	90	93	85	81	74
	Celery	49	46	45	40	45	39	45	34	40	37
	Others	222	223	204	210	218	208	213	183	193	201
TOTAL VEGETABLES		2829	3074	2939	2862	2955	2922	2858	2573	2548	2655
TOTAL		3227	3438	3231	3139	3300	3227	3188	2862	2816	2980

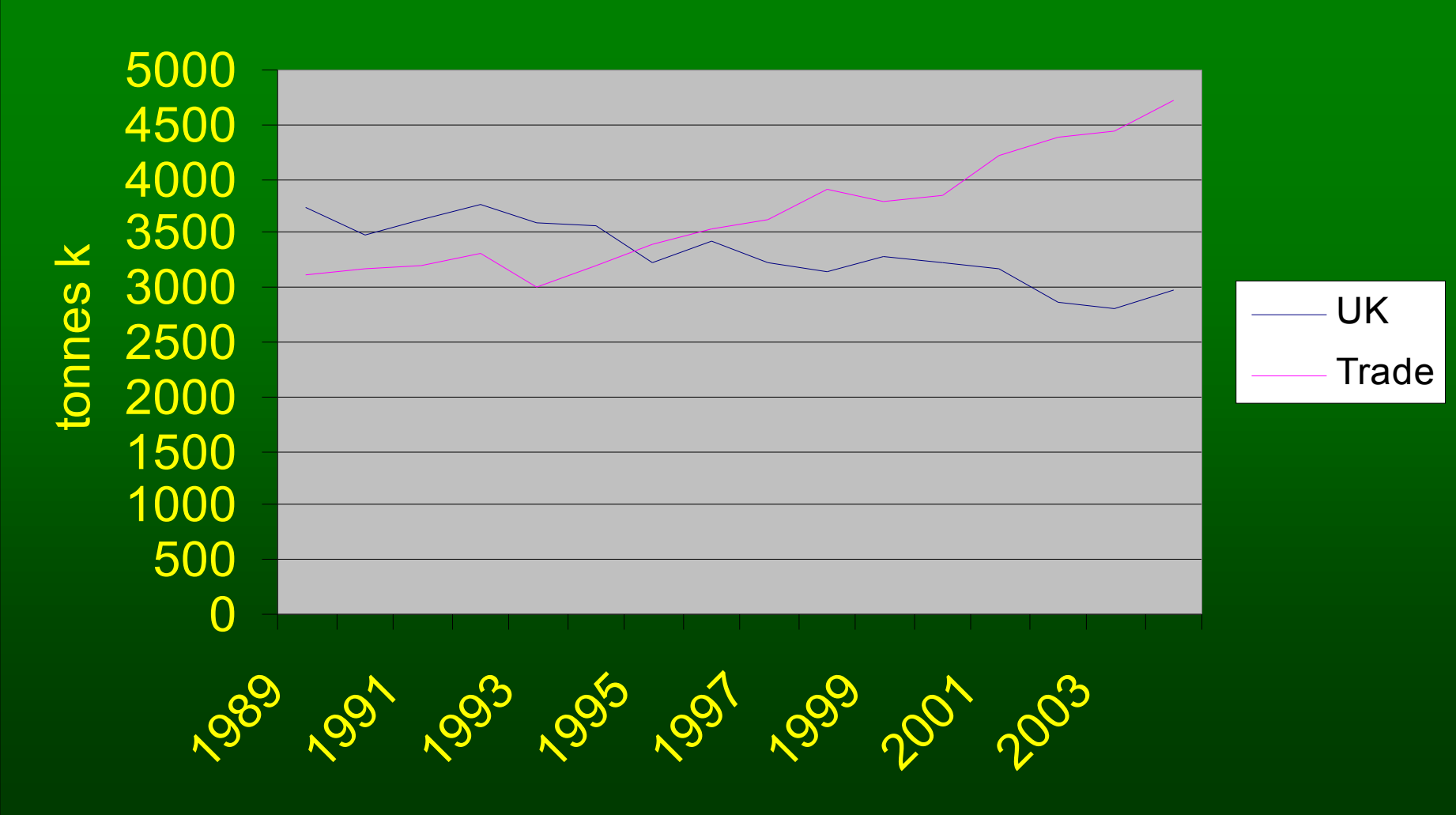
Total Market Fruit



Total Market Vegetables



Total Market Fruit & Veg



Total Market

UK Self Sufficiency													
			1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Fruit	UK		401	552	450	508	518	464	428	398	364	292	277
	Trade		2090	2141	2167	2181	2312	2192	2245	2327	2409	2453	2702
	Total		2491	2693	2617	2689	2830	2656	2673	2725	2773	2745	2979
	%		16	20	17	19	18	17	16	15	13	11	9
			1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Vegetables	UK		3249	3192	3040	3116	3238	3137	3146	2828	3074	2939	2862
	Trade		949	987	1019	1015	989	809	945	1083	1119	1171	1197
	Total		4198	4179	4059	4131	4227	3946	4091	3911	4193	4110	4059
	%		77	76	75	75	77	79	77	72	73	72	71
			1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Total	UK		3650	3744	3490	3624	3756	3601	3574	3227	3438	3231	3139
	Trade		3039	3128	3186	3196	3301	3001	3190	3410	3528	3624	3899
	Total		6689	6872	6676	6820	7057	6602	6764	6637	6966	6855	7038
	%		55	54	52	53	53	55	53	49	49	47	45