

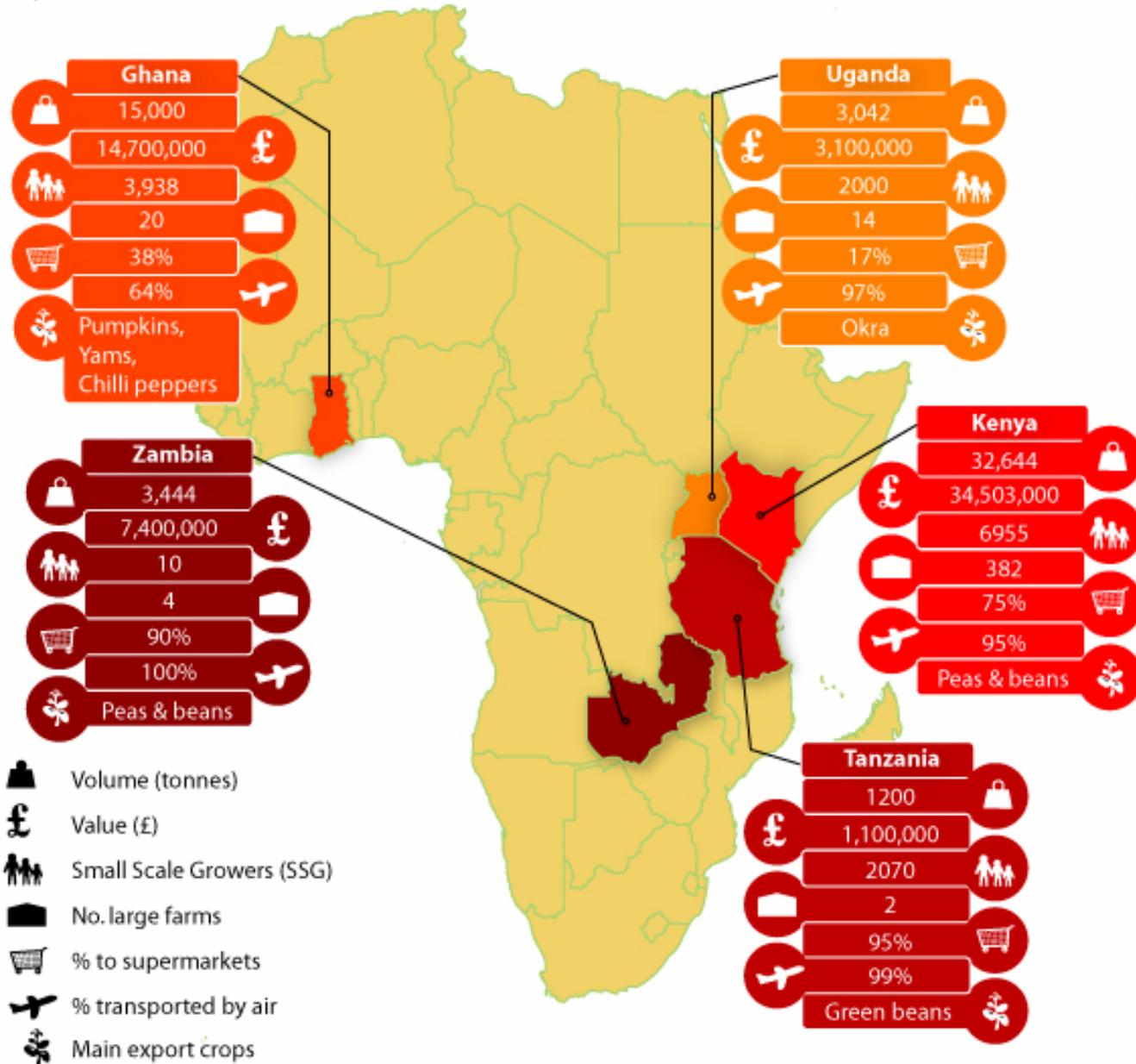
Mapping the flows of African
smallholder produce from Africa
to UK wholesale and retail

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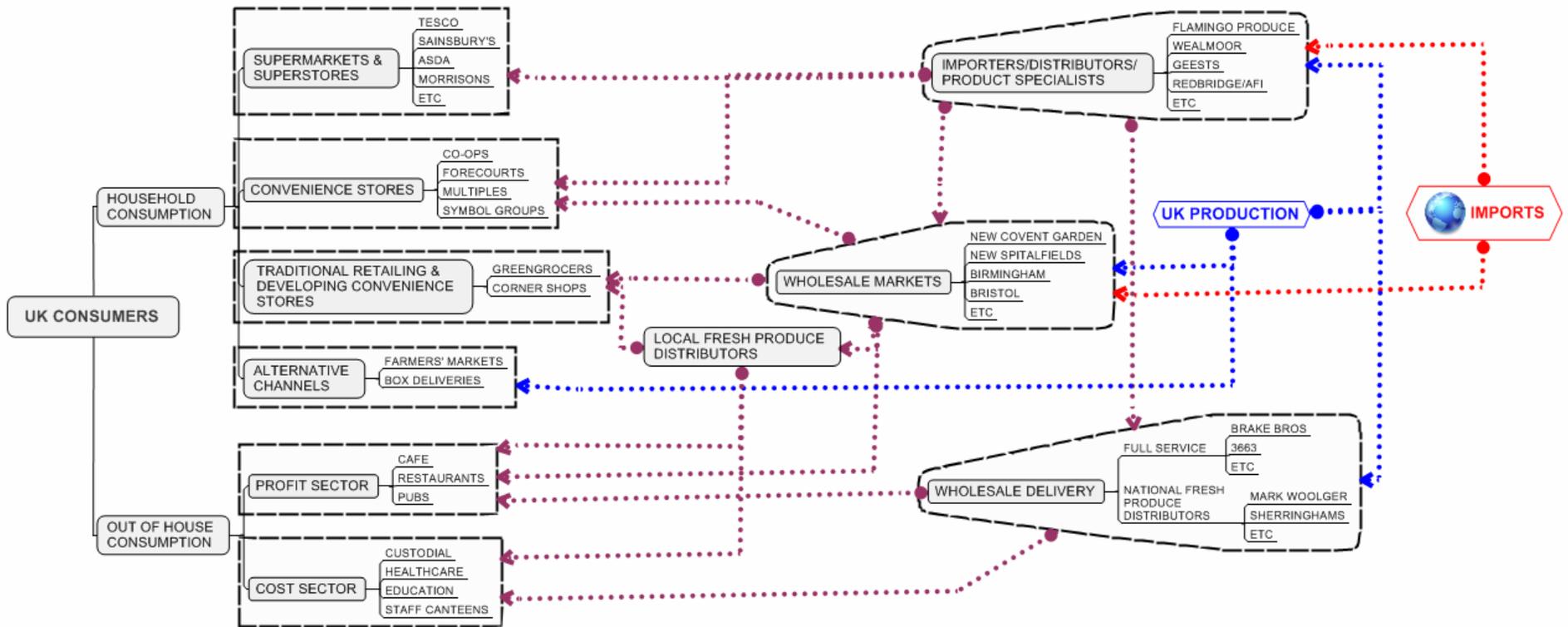


All Fresh Fruit and Veg (FFV) Imports from Africa to the UK



UK destination distribution





Flow of Non-Certified Fresh Produce in the UK

Imports from SSA
(excl bananas, citrus, pineapples, stone fruit, grapes)
£131mn c&f

Non-certified imports from other
(excl bananas, citrus, pineapples, stone fruit, grapes)
£80mn c&f

Of which non-certified
£30mn c&f

Of which certified
£101mn c&f

Total UK imports of non-certified selected fresh produce
£110mn c&f

Note the data on imports only covers lychees, mangoes, papaya, passion fruit and unspecified fruit; and beans, peas, mini-aubergines, chillies, cassava, yams, sweet potatoes and unspecified vegetables

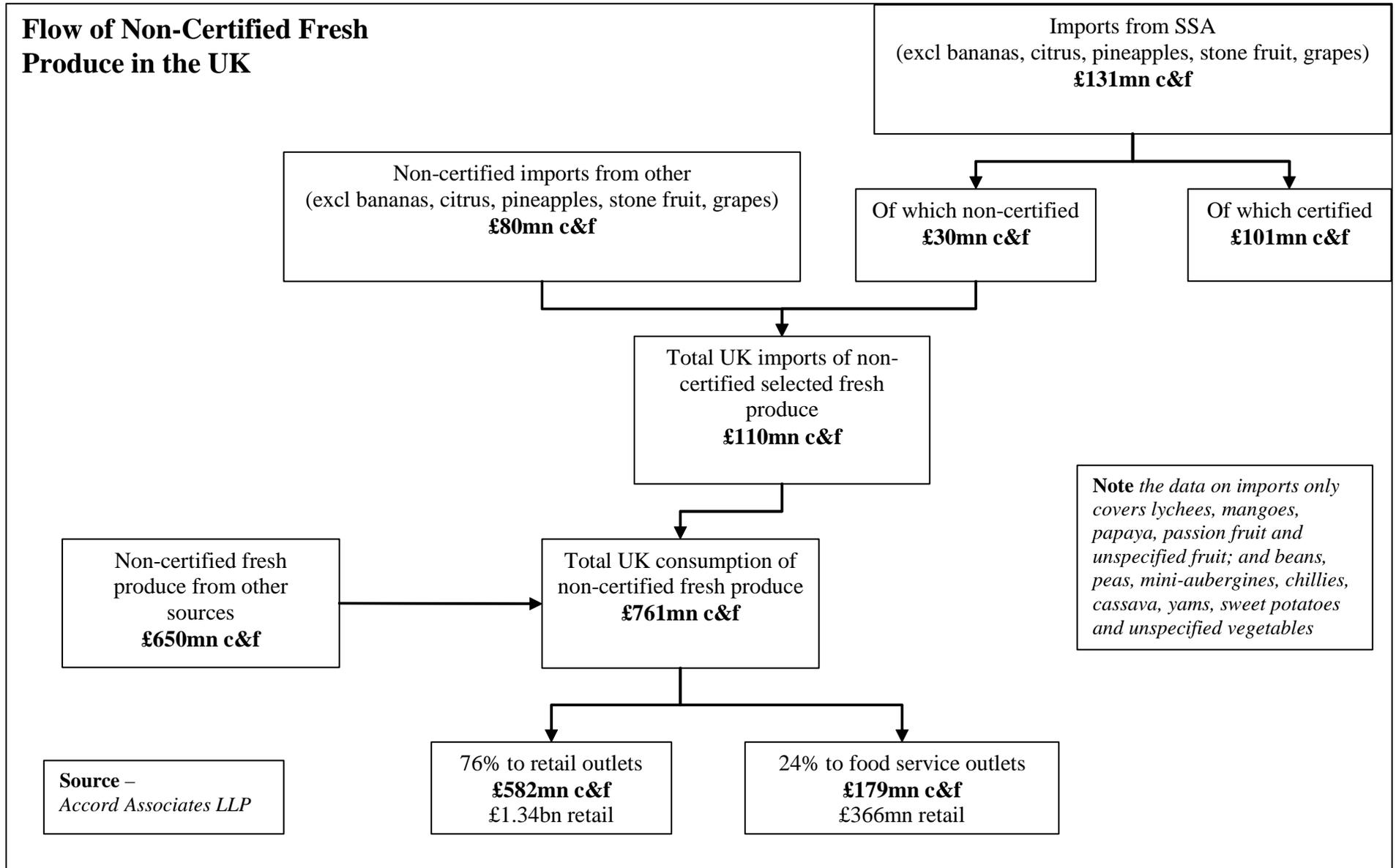
Non-certified fresh produce from other sources
£650mn c&f

Total UK consumption of non-certified fresh produce
£761mn c&f

Source –
Accord Associates LLP

76% to retail outlets
£582mn c&f
£1.34bn retail

24% to food service outlets
£179mn c&f
£366mn retail



| Positive influences | Negative influences |
|---|---|
| Steady growth in the value of grocery which includes fruit and vegetables | The fruit and vegetable market in the UK is generally regarded as being mature and therefore not good for new entrants |
| | Increasing strength of multiple-retailers will result in more FFV having to be certified. Multiple retailers account for 84 per cent of FFV sales – an increase of 2.2 per cent between 2000 and 2002 |
| Increase in number of convenience stores | Increase in number of multiple-convenience stores – that demand certified products |
| | Decrease in number of independent convenience stores (who do not demand certified products) – which has led to a decrease in FFV sales through this segment. The number of outlets fell by 5 per cent and sales had fallen by 4 per cent between 2005 and 2007. |
| Increase in popularity of ethnic restaurants – (although much of the fresh produce that is used are temperate vegetables that can be grown locally) | |
| Promotion of fresh fruit and vegetables for healthy lifestyles – but the FFV market is reaching its peak with consumption at about 2,300 grammes/person/ week | Promotion of local production in both retail and food service outlets |
| | Environmental concerns regarding air freight of FFV |
| Steady increase in demand for ethnic food – from 22 to 30 gram/person/week over last 5 years | Preference of some restaurants to promote local and seasonal products |
| Growth in Food Service sector | Increasing demands by food service industry for traceability – as the industry consolidates |
| | Even smaller food service companies are increasingly demanding the auditing of supply chains |
| | Local government institutions wanting to support local production and reduce their carbon footprint |
| | Consolidation in the food service industry will result in fewer, but larger, catering supply companies, which will demand higher standards of certification |
| | Overall, sales in the wholesale markets are, at best, steady and there is a switch from supplying retail outlets to the food service sector – much of which is very cost conscious. |