

# **BRITISH APPLES & PEARS LIMITED – WRITTEN EVIDENCE (HSI0063)**

## **House of Lords Committee: call for evidence on the Horticultural Sector**

British Apples & Pears Limited (BAPL) is a grower-funded, not-for-profit organisation that represents all commercial apple and pear growers of dessert and culinary fruit in the UK. BAPL works hard on behalf of its members to safeguard their interests and grow the market share of British apples and pears. Our ambition is for at least 60% of apples sold in the UK to be British by 2030. Today British apples represent less than 40% of all apples sold in the UK despite being our national fruit. British apples can be stored for up to 12 months of the year and therefore British growers could supply a much higher proportion of the fruit sold.

Despite this ambition, the value of orchard fruit has decreased by 15% to £287m between 2020 and 2021<sup>1</sup>. Apple and pear production is part of the £4bn Horticulture industry which is worth 20% of farmgate value from just 2% of the land area. A sector that should be being celebrated, promoted, and supported. BAPL activities include industry representation, government liaison, data gathering and raising consumer awareness and promotion. The organisation now also funds much-needed research and development to protect the crop, since the demise of AHDB Horticulture. BAPL represents 95% of all British dessert and culinary apple and pear growers with almost 300 members. We are delighted to be able to respond to this enquiry.

BAPL believes that the sector should be championed by both government and retailers. The UK is one of the best climates in the world to grow apples with a mild maritime climate. They are the best tasting in the world because they ripen more slowly than apples from all other growing regions which have either continental/sub-tropical (Europe, Chile, New Zealand) or semi-arid climates (USA). Only profitable businesses can be sustainable and can continue to invest in productivity and environmental outcomes.

BAPL fully supports the [NFU Horticulture Growth Strategy](#), published in March 2023.

### **1. Key challenges, risks, and opportunities facing the sector**

#### **Challenges:**

- a) The failure in government to provide enabling policy for the sector. Policies of immigration, energy, water, planning, crop protection and the environment are limiting the sector's resilience and have been a significant contributing factor to the market failure that all of the fresh

produce sector is now experiencing. The most important of these is access to seasonal labour – workers that are prepared to travel to do seasonal work for specific periods and return home at the end of the period. The Seasonal Workers Scheme is highly valued by the sector but is hampered by its lack of permanence with government decision making being so late each year that the scheme's effectiveness has been jeopardised each year, leading to low worker return rates, low productivity levels and permit operators and employers lacking certainty about where labour will come from. This has led to reductions in investment, planting and therefore a decline in production, especially for annual crops like strawberries and vegetables. The length of the visa should be nine months rather than six months to reflect the growing season. Permit operators are being unfairly penalised for missing "return rate" targets because the Home Office has been accepting asylum applications from workers holding these visas and then suspending and revoking permit operator licences. This has caused significant disruption. The Home Office should either account for these applications when assessing operator performance or refuse asylum to a visa holder.

- b) Brexit has reduced the seasonal workforce that the sector relies on, created new complexities for research funding, crop protection policies and trade policies in terms of imports and exports.
- c) The Covid pandemic created a surge in demand for fruit through grocery retail, requiring businesses to keep going at any cost, and the "return to normal" post-pandemic created a spike in energy costs in late 2021 which has been sustained into 2022 and 2023.
- d) The war in Ukraine which has exacerbated energy costs and created volatility in input markets, increased costs and distorted the EU fruit market due to sanctions imposed on Russia.
- e) Supermarkets' market failure has created a "race to the bottom" on price. The government has delegated a "cheap food" policy to the market. Retailers used to insist that the highest priority was availability of product (to have full shelves and to drive the profit per m<sup>2</sup>.) Instead, today they are simply targeting goods with the lowest price available to purchase which is creating empty shelves<sup>2</sup>. This means that British produce is often substituted by imported produce, often grown to a lower standard and of lower quality. It is critical that retailers support the horticulture sector to be sustainable, achieve meaningful ESG (environment, social and governance) gains, and support investment in innovation and technologies. Food producers should have an *equal* stake in the value chain. Retailer contracts are often single year, lack inflation clauses and do not provide the certainty and partnership approach that growers require to invest in long term crops. To plant an orchard in the winter of 2022/23, the grower would have ordered trees in 2020, the trees once planted would not come into full production until 2027/28. The risks associated with the current "cheapest price" approach do not give growers the

confidence and certainty required to make such long-term investments.

- f) Super inflation has caused significant harm to the sector in the last 18 months. It costs 23% more to grow, pick and pack apples in November 2022 compared to the year before<sup>3</sup>.
- g) Static returns are causing disinvestment. The BAPL grower survey of 2022 revealed that grower returns had increased by only 0.8% in the year<sup>4</sup> which is leading to the removal of orchards without the planned re-planting. Over one million trees should have been ordered for winter 2022/23 and yet only 500,000 were ordered. Of these one third were cancelled.
- h) Unfairness in the supply chain. According to ONS data, the lowest consumer price of apples increased by 17% between September 2021 and September 2022. This increase in price to the shopper is being retained by the retailer and not being shared with growers who received just 0.8% increase in returns between 2021 and 2022<sup>4</sup>.
- i) Supermarket specifications mean that profitable apples are only those that measure 60-68mm in diameter. Smaller apples and larger apples are worth less, diminishing returns and creating much higher food waste on farm and in the packhouse.

### **Risks:**

- a) The weather is usually the biggest risk that growers take. Growing an outdoor crop means that growers risk losing their crop to frost (uninsurable); hail (insurable); heat (extreme temperatures can cause sun scorch and ruin apples, uninsurable); drought (affects yield and reduces the size profile of the crop which can damage profitability, uninsurable); flooding/excess rainfall (waterlogged trees die, uninsurable).
- b) Financial risk is significant as few retailers work in partnership with growers to mitigate risks. As well as the weather-related crop loss scenarios explained above, growers must invest £50,000-£75,000 per hectare to establish orchards which do not become fully productive for at least five years. With current levels of workforce inflation and other inflation, an orchard profitability model is unlikely to break even during its lifetime.
- c) Biodiversity loss – as the UK loses productive commercial orchards the biodiversity loss will be highly significant. Orchard blossom is a huge source of food for bees and pollinating insects which are supported by on-farm wildflower margins and alleyways throughout the summer and early autumn months.
- d) Pest and disease – Apples and pears suffer from various pests and diseases which if not prevented or controlled may lead to crop or yield loss, or a reduction in quality. Growers use integrated pest management techniques to protect their crops, for example, from moths which are a major problem as they puncture the apples with holes and damage the crop so that it cannot be sold. Growers use

moth traps in the orchard to check for pest numbers. Only when the threshold of a certain number of moths is reached do they act. For codling moth, growers use a pheromone mating disruptor called RAK 3+4. These are discs that are hung in the orchard which sterilise the male moths to stop the moth population increasing so spraying the crop is not required.

- e) Crop protection regulation - since leaving the EU which has a hazard-based approach to the regulation of crop protection products, and despite promises from the UK government to introduce a more enabling risk-based approach, nothing has changed. In fact, things are far worse because the GB costs from the Health and Safety Executive's (HSE) Chemical Regulation Division (CRD) to register active chemicals, bio-controls and biopesticides is the same cost as for the whole of the EU, leaving many suppliers unsure as to whether they can justify the cost to register products in the UK. Approvals for 79% of GB actives expire in 2024. Currently applicants do not know how much the renewal process will cost, or if CRD will require additional data (to that required by EU). For the first time, UK farmers and growers are facing the real prospect of losing crop protection tools, not because active substances fail regulatory requirements, but because GB regulatory fees will mean it is not commercially viable for manufacturers to support them through a GB regulatory process. This effect will be greater for the specialist fruit and vegetable sectors like apple and pear because the smaller GB market for these products and size of these sectors limits the opportunity for companies to recoup the costs of GB registration. This puts British growers in an unacceptable position. It will make it impossible to grow the crop and to compete with imported fresh produce coming from markets with generally much greater access to crop protection products.

### **Opportunities:**

- a) Human health – apples and pears have tremendous health benefits<sup>5</sup> and the UK grows the most delicious tasting apples and pears in the world because they ripen more slowly than in other climates. There is significant concern about the health of the UK population, expressed succinctly in a report from the British Medical Association in 2022<sup>6</sup>. More people than ever have Diabetes in the UK<sup>7</sup>: 4.9 million people have diabetes, and 13.6 million people are at risk; 850,000 people are living with undiagnosed type 2 diabetes and yet research has consistently shown that diet, exercise, and weight loss can be effective in reducing the risk of type 2 diabetes by about 50%. Diabetes costs the NHS almost £14 billion per year whilst the cost of absenteeism and early retirement is estimated to be over £15 billion<sup>7</sup>. The National Food Strategy<sup>8</sup> published in 2022 made stark recommendations: Escape the junk food cycle and protect the NHS; Reduce diet related inequality; Make the best use of our land; Create a long-term shift in our food culture. Only 8% of children (11-18 years), 27% of adults (19-64

years) and 35% of those aged 65 years and above actually achieve the 5-A-Day recommendations and those from deprived areas are the least likely to achieve the recommendation<sup>9</sup>.

Apples and pears have a significant role to play to ensure that everyone includes at least one apple or pear in their diet every day, replacing bagged snacks like crisps or chocolate that are often more than double the cost and contain triple the number of calories. A bar of chocolate contains 200-230 calories where a single apple contains just 77 calories and the fibre in the skin of the apple acts to help the consumer feel full for longer.

- b) Government choosing to advocate for and champion British Horticulture. A clear opportunity exists for government to actively promote the British Horticulture sector which would create the enabling policy framework so desperately needed especially for policy areas such as: immigration; energy, water, planning, crop protection and the environment. The sector delivers almost 20% of farmgate value from just 2% of the land. Judicious expansion of the fruit and vegetable sector (right crop, right place) would enable production of more home-grown fruit and vegetables, increase local and seasonal availability, reduce food miles by reducing reliance on imports and improve the health and wellbeing of society. Such a position by government would deliver against the number one recommendation from the National Food Strategy which called on government to break the junk food cycle<sup>8</sup>.
- c) Improve productivity through actions including research, automation, robotics, breeding programmes and innovation with government grants and tax incentives targeting the sector.
- d) Increase environmental outputs through thoughtful, detailed environmental schemes that are based on a clear understanding of orchard profitability. Every British orchard could be planted with wildflowers through the alleyways if growers received assistance with upgrading their orchard machinery to allow the flowers to thrive (this will mean the development of and investment in machinery that does not travel through every alleyway). Every British orchard could create nature sanctuaries, e.g. bee hotels for solitary bees, select biodiverse options for hedgerows and windbreaks and use mulches to improve soil condition and reduce the need for irrigation and herbicides. All these practices have a significant cost and could be incentivised through the ELMS scheme.
- e) Export of British apples and pears. Growers are exporting small volumes<sup>1</sup>. The UK is a good place to grow fruit and arguably with the impacts of climate change on many apple growing regions in the rest of the world, the UK will have a moral responsibility to grow more fruit for export to those countries where high temperatures and a lack of rainfall prevent local production. Government could choose to champion the export of fruit by investing in the sector through a

marketing campaign, assistance for businesses with attending trade shows and resource for navigating the complexities of trade deals and trade barriers, e.g. maximum residue levels (MRL's) and phytosanitary requirements.

- f) Global competitiveness. British growers' competitiveness is threatened by recent trade deals that undermine the high standards of British production. Public opinion polls are clear, they state that 93% want the UK's high food standards to be maintained in all post-EU exit trade deals<sup>8</sup>. The UK's Trade and Agriculture Commission states that if trading partners cannot "demonstrate equivalence with core standards then they would not be considered for zero tariff, zero quota access"<sup>8</sup>. In recent years British apple growers have invested in long storing varieties (new clones of Gala and new varieties such as Magic Star, Junami, Red Prince and Kentish Kiss), and can store apples for up to 12 months to provide shoppers with a year-round supply of British apples, diminishing the need for imported apples. There is an opportunity for government to recognise the value of and champion home-grown production and provide protection in future trade deals to ensure that British growers remain globally competitive.

## **2. The impact of climate change on the sector, and how it can be mitigated**

Climate change will have impacts that include weather volatility such as high rainfall which can cause tree death if soils become waterlogged and increase the incidence of diseases such as scab and canker; drought which reduces crop yields and affects crop size profile producing smaller apples leading to lost profit; high temperatures which may cause sun scorch on certain apple varieties and can create tree stress leading to reduced tree health and lower yields; frost which can decimate a crop and hail which can damage a crop and make it unsaleable.

Some studies are also linking climate change to changes in pollination dates and insect availability. All these impacts can be mitigated through appropriate investment in science and innovation to overcome the changes and challenges ahead. Apple breeding programmes, new novel growing systems, pest and disease research and innovation in machinery and robotics will be required.

Growers are working hard to measure and monitor carbon emissions and sequestration although current carbon measurement tools are a limiting factor and each one produces significantly different results. BAPL is benefiting from a Innovate UK grant to undertake a feasibility study on the use of pyrolysis kilns to create biochar with the woody matter created at the end of orchard life, to reduce carbon emissions. This project has recently put forward a proposal to extend this work to include the Lifecycle Carbon Analysis (LCA) of apple production to provide a clear understanding of what growers can target to further reduce carbon emissions.

Securing water availability for the sector will be key. The UK should be investing in a major water infrastructure project to make water available year-round to households and growers. Enough water falls on our island, but measures are required to reserve and re-direct this important resource to where it is required during periods of low rainfall and drought. Climate change will be much more significant for other apple growing regions than for the UK. Most other growing regions are already water stressed<sup>10</sup> and this is likely to become more significant with climate change.

### **3. Skills and recruitment challenges, particularly in relation to skilled jobs**

The UK has an ageing population, high vacancy rates combined with the lowest unemployment rates on record<sup>11</sup>. Politics aside, if the UK wishes to grow its economy and the business sectors that contribute to GDP, rural employment and the rural economy, then businesses must be enabled to source a workforce. The UK education system needs a dual objective to create not just the graduate jobs that the economy needs, but to also inspire students into the vocational roles that the economy requires. This will require a restructure of the education opportunities open to students and a re-focus for careers teachers on the vocational roles available in the horticulture industry and the career paths open to graduates and non-graduates. In addition, we welcome the initiatives by government to get the over 50's back to work. As highlighted in the [Defra Automation Review](#), the industry invests significantly in automation and robotics, but for the most labour intensive roles, technological solutions are still many years away from commercial realisation.

The immigration system requires an overhaul to ensure that the visa schemes open to overseas workers and UK employers are cost effective and fit for purpose. Seasonal workers are critical to the horticulture industry, as many tasks require multiple hands for short periods of time. Apple trees require pruning for 6-8 weeks in the winter; thinning the crop in mid-summer for 2-6 weeks, dependant on crop load; and harvesting (every dessert apple is hand picked) for 6-10 weeks in the Autumn. Seasonal work offers a "win/win" for the worker and the employer, providing a high income to the worker and a good source of workers to meet peaks and troughs for the employer. The base rate wage for 2023 is the national living wage at £10.42/hour with many workers able to earn £15-20/hour on piecework rates. Seasonal workers return home to finish their education, educate children, build homes, and start businesses. The Seasonal Workers Scheme needs to be made permanent, the visas need to be valid for nine months rather than six months and the government needs to provide much greater certainty with much longer lead in times, so that growers have the confidence to plan their businesses over a three to five year period.

Skilled workers are desperately needed in many sectors of our economy. Government could help with re-training grants that employers could use to help individuals transition into the sector and/or make career changes.

Many businesses find that the Apprenticeship levy is taken from them but that the apprenticeships on offer are not aimed at the edible horticulture industry and so are less appropriate for their business, meaning that they cannot benefit from the apprenticeship scheme.

#### **4. The availability of funding for science, research and development to enable innovation**

Funding for applied research in primary food production innovation has been funnelled through Innovate UK in recent years. Whilst it is critical that the funding is in one place and whilst the themes of the numerous grant opportunities are often relevant to Horticulture, the sector often loses out to broadacre crops or livestock on the basis that these sectors provide a wider (people/land) impact. Innovate UK should be able to fund the automation and robotics projects that the sector so desperately needs. The Innovate UK application process and platform requires significant investment by government to modernise it and to improve the delivery of the grants for the horticulture (and agriculture) sector. The system is bureaucratic, requires a huge time investment and is designed for the academic sector who benefit from employing project leads, project control managers, finance teams and academics. It is expensive to participate in, lacks agility for business and is extremely onerous. With the demise of AHDB, the sector has created Horticulture Crop Protection Ltd to ensure that the applications for the registration of crop protection products, their emergency approval, and the extension of authorisations for minor use crops continues. BAPL is fully supportive of this initiative and is also looking to continue its own research and development work to overcome pest and disease issues and mitigate against climate change through the new technical committee that is now part of BAPL rather than AHDB.

The sector would like to be able to easily access small grant awards to assist with this work. Grants of between £50,000 to £250,000 would be extremely useful to speed up delivery of climate change related and pest and disease work. These projects could reduce carbon emissions, improve productivity, and improve the environmental outcomes in orchards.

#### **5. Benefits and challenges of implementing technological developments, particularly those that help combat climate change and its effects**

The sector has benefited from the EU Fruit and Vegetable Producer Organisation regime, however, the future of this is extremely uncertain and despite Defra's commitment to develop a replacement, no new scheme design has been proposed. This policy could be designed to drive productivity and environmental outcomes such as the funding of capital items, robotics, automation, breeding programmes, development of new growing systems, renewable energy alternatives, new packaging development, water capture, water treatment, new irrigation methods, carbon capture, reducing carbon emissions, increasing biodiversity and wildlife gain.



Environmental schemes and the new ELMs SFI are all designed around taking land out of production and focus on “income foregone”. For tree fruit and orchards this is counterproductive because it drives low participation rates. Instead, environmental schemes should be designed to create good environmental outcomes within the orchard itself. Every British orchard could be planted with wildflowers through the alleyways if growers received assistance with upgrading their orchard machinery to allow the flowers to thrive (this will mean the development of and investment in machinery that does not travel through every alleyway). Every British orchard could create nature sanctuaries, e.g. bee hotels for solitary bees, biodiverse options for hedgerows and windbreaks and the use of mulches under trees to improve soil condition and reduce the need for irrigation and herbicides. All these practices have a significant cost and could be incentivised through the ELMS scheme.

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## **6. The impact of trade on i) UK businesses ii) the environment and iii) bio- and phytosanitary issues**

The UK imports around 85% of the fruit we consume. UK supermarket policy now appears to be predicated on buying the cheapest food possible. Importing foods simply because they can be produced at lower cost elsewhere means that the UK is offshoring environmental and water footprint to other regions. This is morally reprehensible as the UK should be leading in the work to halt the degradation of habitats here and across across the world. Importing cheap food also reduces the ability for retailers to manage labour markets and risks moving production to countries where low pay and modern slavery risks are higher.

Biosecurity must be taken seriously at our borders, especially when importing young trees for planting from Belgium, France and the Netherlands. The current regime where inspections are undertaken at the place of destination has worked well for growers, with checks conducted within an appropriate environment and in a timely fashion. The new Target Operating Model (TOM) proposes checks moving to Border Control Points (BCP) and raises concerns for the industry as this holds its own biosecurity risks and delays could mean the death of trees or significant damage to tree health. There is significant concern from growers that moving consignments to a BCP risks supply chain disruption, will add significant cost and potentially will create catastrophic delays.

Inspection regimes must mitigate any risk of cross contamination between consignments, maintain crop vitality, and prevent crops from deteriorating or being damaged while undergoing inspections. The NFU is calling on government to introduce an Authorised Operator Model, to enable checks to be carried out at the premises by qualified staff within the business. BAPL fully supports this proposal.

## **7. Lessons learned from horticultural policy and practice from overseas, or from the devolved administrations**

Our Chairman, Ali Capper participated in a Defra trip to New Zealand to consider what could be learned for the UK Horticulture industry. The full report is available here: <https://britishgrowers.org/wp-content/uploads/2021/10/210622-New-Zealand-Industry-Report-FINAL.pdf>

New Zealand has a thriving Horticulture industry focused on the export of edible produce to the rest of the world. They have an enviable relationship with their Ministry of Primary Industries and a shared ambition to deliver benefit for growers and the nation as a whole. The NZ government invests significantly in the research and development for the sector through NZ Plant & Food to derive valuable export income from overseas markets. Sitting at the heart of the industry is HortNZ, funded through a compulsory levy system. HortNZ and its constituent organisations perform several roles, including political representation, near-market R&D and export promotion.

The successful development of new markets for New Zealand fresh produce is due, in part, to the use of single-desk and grower-owned marketing operations. The best example of this is Zespri – the kiwi fruit marketing organisation which controls every aspect of the New Zealand kiwi fruit operation, from production volumes through to exports. This has allowed Zespri to become a global operation, managing a global demand for New Zealand kiwi fruit valued at c.NZ\$2bn.

A similar situation applies with New Zealand apples, where a small number of marketing desks have created an export market for New Zealand apples valued at NZ\$732m. It is evident that the New Zealand marketing desks, with grower boards and managed supplies, exert greater grower influence, which ultimately delivers better returns that lead to increased investment. This approach retains their position in a highly competitive global marketplace.

Some British growers now believe that the only way to break the power imbalance between British growers and UK supermarkets is to find new markets overseas to export the crop to derive more value. Others believe that competition law needs to be reviewed to reset the relationship and rebalance the power dynamic between small family farming businesses and the multi-billion-pound turnover retailers they serve. With a population of almost 70 million in the UK (compared to New Zealand with only c. 5 million), British growers should be able to grow their crop for sale at home and be able to make a fair return that includes profit for reinvestment.

The British government could choose to advocate for and champion home-grown produce, creating policies for retailers and food service companies that ensure they seek to source British first to reduce food miles and to prevent the offshoring of environmental and worker welfare degradation to other countries.

### **8. The effectiveness of Government planning and policymaking in relation to horticulture**

Some growers believe that the UK government is trying to close the sector through inappropriate energy, immigration, planning, Food Strategy, plant health and water policy. All this could change if the government decided to support a bold strategy to champion the growth in production of British fruit (and vegetables, plants and flowers). There is no reason why the share of apples available to British shoppers should be at only 40% when it could easily be 60% or even 75% with the right investment and policy measures.

### **9. The impact of recent legislation on the sector, including the Agriculture Act 2020 and the Environment Act 2021**

There is market failure today. Grocery inflation is now at a record high of 17% for apples<sup>4</sup>. The power of buyers in the grocery market is taking value out of the diminishing returns (just 0.8%)<sup>4</sup> of grower business, in turn leading to a significant restructuring of the sector. We fully support the NFU asks in this area: We call on Defra to work with the horticulture sector to promote a fair and functioning trading environment by seeking to retain the Groceries Code Adjudicator role and renew and refresh the GSCOP Code to embed the GCA's 7 golden rules. We ask that the Government also uses its powers in the Agriculture Act to assess the risk profile within the horticulture supply chain by launching an urgent investigation and consultation to gather evidence of the worst inequalities of trading behaviours within the supply chain. The Secretary of State must also use its powers within the Agriculture Act to improve fairness and transparency in the supply chain, particularly acting to support primary producers who fall out of scope of GSCOP, who are inherently at an increased risk of unfair trading practices.

British apple and pear growers believe it is important that the future framework for new environmental targets delivers for the needs of agriculture and the environment, and it's absolutely critical the government's ambitions sit alongside equally ambitious plans for domestic food production and UK food security.

### **10. Horticulture's contribution to mental and physical health**

Working outside in orchards can contribute to excellent mental and physical health benefits. However, of more concern now is the market failure in British apple and pear production and the mental health pressures that growers find themselves suffering. The effects of Brexit, Covid, the war in Ukraine and the super inflation facing grower businesses means that the current situation feels unrelenting to many growers.

Should the British government choose to champion the sector and deliver against the asks in this paper these concerns would be alleviated somewhat.

### **Source references:**

<sup>1</sup> Defra Hort stats -

<https://www.gov.uk/government/statistics/agriculture-in-the-united-kingdom-2021/chapter-7-crops#fresh-fruit>

<sup>2</sup> <https://www.thegrocer.co.uk/fruit-and-veg/shortages-of-fruit-and-veg-linger-despite-end-to-restrictions/677348.article>

<sup>3</sup> <https://www.nfuonline.com/updates-and-information/promar-report-the-real-impact-of-cost-pressures-on-the-horticulture-sector/>

<sup>4</sup> <https://www.britishapplesandpears.co.uk/grower-survey-news-2-2/>

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<sup>6</sup> <https://www.bma.org.uk/media/6520/the-country-is-getting-sicker-bma.pdf>

<sup>7</sup> <https://www.diabetes.org.uk/professionals/position-statements-reports/statistics>

<sup>8</sup> <https://www.nationalfoodstrategy.org>

<sup>9</sup> <https://www.bda.uk.com/resource/are-we-achieving-5-a-day.html>

<sup>10</sup> <https://blogs.cranfield.ac.uk/agrifood/healthier-diets-mean-water-scarcity-footprint-uk-fruit-veg-system/>

<sup>11</sup>

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/uklabourmarket/latest>

10 April 2023