



Abel & Cole

**THE FUTURE OF
ORGANIC FRUIT & VEG**

2024

FOREWORD

Anyone who has seen my shows and read my books will know how passionate I am about getting us all to eat more organic fruit & veg. Why? Because plants are the foods that do us the most good, and the planet the least harm.

This passion isn't mine alone. It's one I share with the brilliant folks at Abel & Cole. That's something I've seen first hand, as River Cottage has supplied them with organic products for several years now. **As pioneers of the organic movement, they understand the challenges farmers face and, more importantly, are determined to champion the future of sustainable food** - which is exactly what the Future of Organic Fruit & Veg report is all about.

No stone has been left unturned in the writing of this report. They've surveyed their organic farmers, 1,000 consumers and interviewed 11 industry experts. And it shows in startling clarity what everyone involved in the growing, supplying and sharing of organic fruit & veg knows. Organic farming is not easy.

But as Abel & Cole say, when it comes to food, difficult is worth doing.

There are bright spots on the horizon. Organic farmers are innovators - and some are adapting to warmer weather with new crops. That's why we are seeing a boom time for organic vineyards in the UK and why one of Abel & Cole's farmers is now growing grapes and producing fantastic English wine on the banks of the River Wye.

One thing that especially matters to me, is that biodiversity is an intrinsic part of organic farming. Now, we know that insects and wildlife that were once on the brink are thriving in our organic farmlands, and even acting as natural pesticides to help boost our crops.

There's good news from the consumer side as well. Demand for organic produce is on the rise. Abel & Cole have seen sales of organic mushrooms, British apples and heirloom tomatoes boom - to name just a few from their 'What's Fresh' list of trending organic fruit & veg.

For over 35 years, Abel & Cole have led the way in organic grocery. And I'm optimistic that, together, we're heading toward a bright future for organic fruit & veg.



**HUGH
FEARNLEY-WHITTINGSTALL**

Founder of River Cottage



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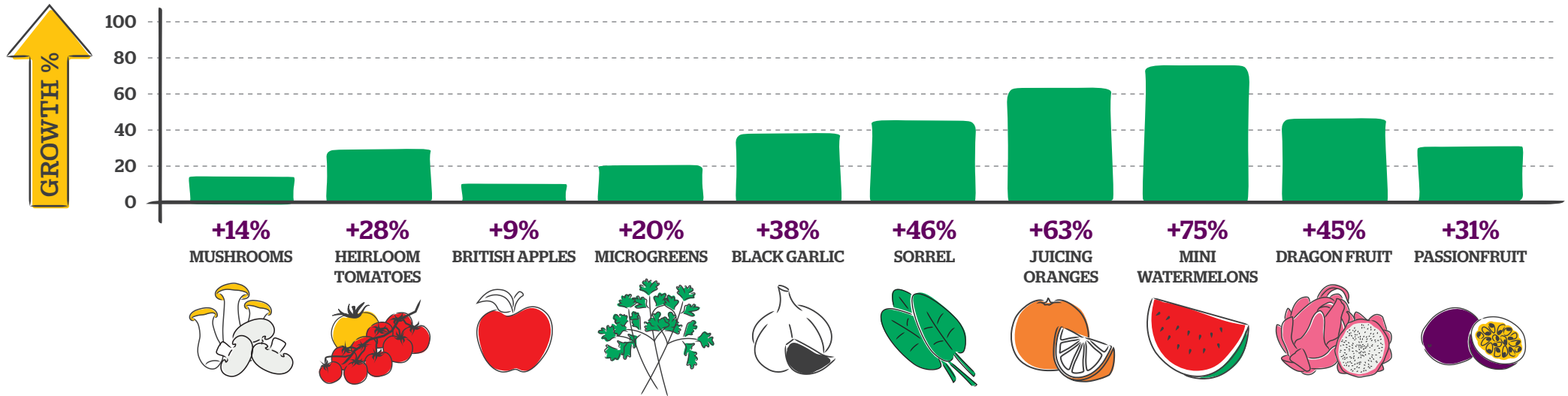
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WHAT'S ON OUR PLATES

The organic fruit & veg Abel & Cole predict the nation will be enjoying through 2024 and beyond. Plus, the organic crops having a more challenging time this year.

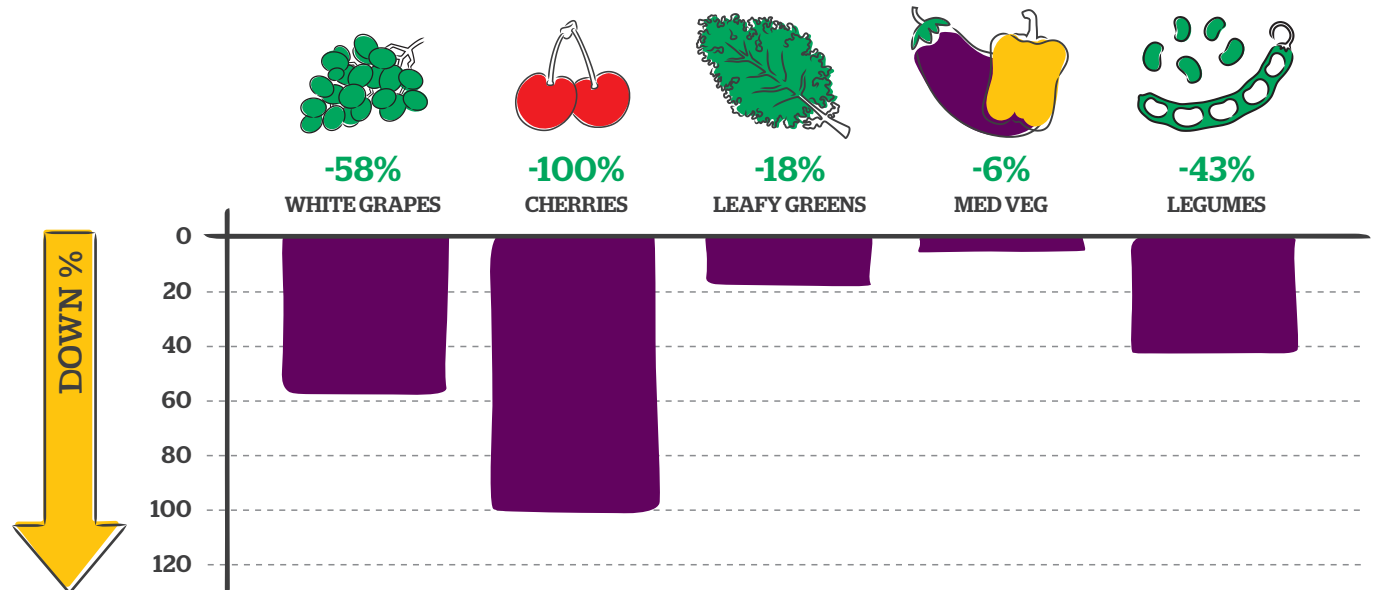
WHAT'S FRESH



TOP FRUIT & VEG OF 2024

What's trending in the world of organic fruit & veg this year. Based on sales data (2024 vs. 2023) and insights from Abel & Cole's team of experts.

WHAT'S FADING





WHAT'S FRESH

MUSHROOMS ARE COMING OUT OF THE DARK

↑ +14%

On a steady rise over the past few years, fungi's popularity has grown - partly in response to the plant-based food revolution. It's not just the humble White Button Mushrooms that are popping up all over though.

At Abel & Cole, we're seeing sales of our more diverse varieties, such as Oyster, Shiitake and

Nameko, grow. In fact, we now have 12 different varieties of organic mushrooms on offer. We've also seen the popularity of speciality mushrooms, like Lion's Mane, boom. Once the best kept secret of researchers and gourmet chefs, the fungus now seems to be everywhere, from Netflix documentaries to Jeremy Clarkson's farm¹. (After a mention on his Amazon show, searches for Lion's Mane spiked by 450%.²)

Luckily for mushrooms, looks don't seem to matter. We've seen a 50% increase in sales of our food-waste-fighting Wonky Mushrooms - delicious fungi which might not quite meet the beauty or size standards required by other retailers. Foraging is having its moment, too. TikToks of people mushroom hunting have been viewed a staggering 1.6 billion times³. With 15,000 species of wild mushrooms growing the UK, there are plenty of them to find.

It's worth noting that it's illegal to pick wild Lion's Mane mushrooms in the UK because they're so rare. That's why we get ours from **Forest Fungi**, an organic grower in Devon.



“It's official - mushrooms are finally having their moment, and it couldn't be more deserved. Driven by a rise in veganism and people wanting to get their protein from plant-based sources, we've seen an increase in sales across lots of different varieties. Lion's Mane is a clear favourite thanks to its social presence and influencers championing the mushroom online. But we're also seeing more people eating them for health reasons. Mushrooms are no longer being seen as a basic vegetable - they're a functional food that taste delicious and could even help heal the body. ”

SCOTT MARSHALL OF FOREST FUNGI

Supplier of fresh organic Mushrooms to Abel & Cole since 2022

HEIRLOOM TOMATOES ARE HAVING A MOMENT

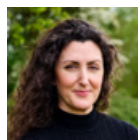
↑ +28%

When it comes to tomatoes, variety truly is the spice of life. In fact, according to a recent YouGov poll⁴, different types of tomatoes take four of the top 20 spots in the UK's most popular veg. The demand for even more variety is increasing, with consumers keen to try out new flavours.

Our most popular sellers have been our organic Heirloom Tomatoes (up 28%), with organic English San Marzano tomatoes close behind (up 25%). Last year, we introduced six new lines of heritage tomatoes to meet the demand. And we've been experimenting with different lines from specialist growers, such as Isle of Wight Tomatoes.

They've been growing organic produce for over 20 years. This year, they've produced 17 unique varieties of organic tomatoes, each grown specifically for their distinctive flavour. This includes the ever-popular Cherry Vine, the bold Kumato, and an assortment of colourful tomatoes including Orange Cherry Vine and Brown Cocktail Vine.

“Thanks to TV chefs and food writers experimenting with different varieties of tomatoes in their recipes, we're seeing more and more people wanting a taste of speciality types. Tomatoes come in all shapes and sizes, colours and tastes. It's great to see the public really embracing all the unique varieties we have to offer over recent years.”

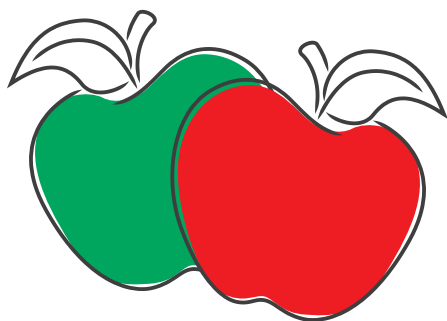


DANIELLA VOISEY

Isle of Wight Tomatoes
Supplier of organic Tomatoes
to Abel & Cole since 2022



¹ Whitney, B. (2023) 'A mushrooming trend: how fungi became an It food', The Guardian, 2 December [Online]. Available at: <https://www.theguardian.com/environment/2023/dec/02/mushroom-food-trend> [Accessed: 04.09.24].
² Stephenson, D. (2024) 'Jeremy Clarkson scores another hit with fungi from Clarkson's Farm', Daily Express, 16 June [Online]. Available at: <https://www.express.co.uk/showbiz/tv-radio/1911425/Jeremy-Clarkson-fungi-boom-from-Clarkson-s-Farm-show> [Accessed: 04.09.24].
³ Garlick, H. (2023) 'The middle-class obsession with foraging is ruining luxury holidays', The Telegraph, 9 November [Online]. Available at: <https://www.telegraph.co.uk/travel/destinations/foraging-the-ultimate-middle-class-holiday-activity> [Accessed: 04.09.24].
⁴ YouGov (2024) 'The most popular vegetables 2024', YouGov [Online]. Available at: <https://yougov.co.uk/ratings/consumer/popularity/vegetables/all> [Accessed: 04.09.24].



BOOM TIME FOR BRITISH APPLES

↑ +9%

While the UK's favourite⁵, the Pink Lady, still dominates sales, at Abel & Cole our organic heritage apples are also booming (up 9%). To meet the demand, we make sure to have at least two named varieties for most of the season. This September, for example, we'll have Early Windsor and Scrumptious apples for sale.

We're also seeing an increase in small orchards growing regional varieties. We've sourced organic apples from **Martin Soble on Whitethorn Farm** since 2004. Martin grows 12 different kinds of apples. *"Most of the apples we grow are traditional and not the varieties you'd see in your everyday supermarket,"* says Martin. *"They're more suited to purely organic suppliers that embrace all types of apples which is why we only sell to organic distributors like Abel & Cole."*

Britain is home to hundreds of apple varieties – at least 30 in Sussex alone. There are over 2,000 varieties of British apples in the National Collection. And more may be on the way, thanks to a project at Bristol University, which is working to capture the DNA fingerprint of lost varieties at the Royal Horticultural Society Garden Rosemoor⁶.

However, heritage apples are at risk. The commercial orchards that dominate tend to grow a limited range of apples because most supermarkets demand a consistently sized and flavoured product, all year round. In response, British apple farmers launched their first ever manifesto earlier this year⁷. It set out 10 actions to be taken to secure the future of the

British Apple industry, from fair contracts to environmental protection and innovation.

Our priority has always been to support our organic apple growers, both now and in the long-term.

BOOST FOR MICROGREENS

↑ +20%

Small but mighty. Microgreens have a well-earned reputation for being the superheroes of the nutrition world. Antioxidant-rich and packed with vitamins, a study has shown they could help support gut health and lower inflammation⁸. Thanks to the surge in demand for healthy and nutritious food products, the global microgreen market is expected to reach \$3.4 billion by 2030⁹.

Another factor in their popularity is the move towards sustainable agriculture practices and locally sourced produce. Microgreens can be grown year-round in small spaces using either hydroponic or soil-based methods.

Ours come from **Alina, at A S Organic**, who grows them in a polytunnel in her back garden in Herefordshire with zero artificial pesticides. Whether grown on windowsills at home or sourced from growers, expect to see microgreens everywhere.



BLACK GARLIC IS IN THE PINK

↑ +38%

Once the preserve of chefs and dedicated foodies, Black Garlic has now hit the mainstream. Only last year, celebrity chef Marcus Wareing¹⁰ labelled it an underrated ingredient. Fast forward to 2024, and it's everywhere. From TikTok to Heinz mayonnaise lines.

Black Garlic is not a distinct garlic variety. Rather, it's regular White Garlic that has undergone a unique fermentation process. It contains higher levels of antioxidants than regular garlic¹¹. And a recent study¹² found that aged Black Garlic extract may help to improve blood pressure.

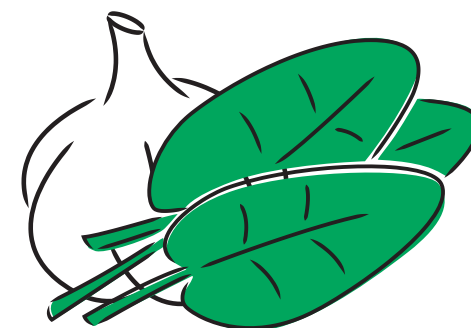
We source ours from **Vincente Sanchez in Spain** (using zero air miles).

SORREL IS ROCKETING

↑ +46%

We've seen our sales of classic organic herbs such as Basil, Thyme and Coriander grow (by 7% on average). But it's Sorrel that's seen the biggest surge. This increase is due to the boom in home cooking. With 28% more Brits cooking at home compared to last year¹³, they're experimenting with different herbs to add extra flavour to their at-home dining.

As a response to this love for herbs, we added to our lines. We started selling potted herbs from the team at **Organic Blooms**, alongside cut herbs. **Simon Weir, of Turf Croft**, grows most of our organic cut herbs on a small, organic farm in the New Forest. British Sorrel isn't available to us all year round. But when it's in season, its tangy goodness is worth the wait.



⁵ Duncan, G. (2023) 'Fresh fruit & veg 2023: Perfect storm of challenges hits UK fruit' (2023), The Grocer, 15 December [Online]. Available at: <https://www.thegrocer.co.uk/top-products/fresh-fruit-and-veg-2023-perfect-storm-of-challenges-hits-uk-fruit/686339/article>. [Accessed 04.09.24].

⁶ Horton, H. (2024) 'UK genetics project looks for lost apple varieties to protect fruit in climate crisis', The Guardian, 23 March [Online]. Available at: <https://www.theguardian.com/science/2024/mar/23/uk-genetics-project-rosemoor-lost-apple-tree-varieties-climate-crisis>. [Accessed 04.09.24].

⁷ Duncan, G. (2024) 'British apples & pears launches manifesto ahead of election', The Grocer, 11 March [Online]. Available at: <https://www.thegrocer.co.uk/sourcing/british-apples-and-pears-launches-manifesto-ahead-of-election/689133/article>. [Accessed 04.09.24].

⁸ Akaike, T., Ida, T., Ihara, H., Kasamatsu, S., Kinno, A., Komae, S., Owaki, T. Untargeted polysulfide omics analysis of alternations in polysulfide production during the germination of broccoli sprouts. Redox Biol. 2023 Nov; 67:102875.

⁹ Microgreens World (2023) 'Trends', Microgreens World [Online]. Available at: <https://microgreenworld.com/microgreens-trends>. [Accessed: 04.09.24].

¹⁰ Wareing, M. (2023) 'Marcus Wareing's underrated ingredients and how to use them', BBC, 28 August, [Online]. Available at: https://www.bbc.co.uk/food/articles/marcus_wareing_ingredients. [Accessed 04.09.24].

¹¹ Collins, J. (2023) 'White garlic or black garlic: which is healthier', Healthspan, 11 October [Online]. Available at: <https://www.healthspan.co.uk/guides/white-garlic-or-black-garlic-which-is-healthier/#:~:text=The%20fermentation%20process%20involved%20in,conditions%20of%20raw%20unfermented%20garlic>. [Accessed 04.09.24].

¹² Bambridge-Sutton, A. (2023) 'Aged black garlic extra may improve blood pressure, study suggests', Food Navigator, 10 October [Online]. Available at: <https://www.foodnavigator.com/Article/2023/10/10/aged-black-garlic-extra-may-improve-blood-pressure-study-suggests>. [Accessed 04.09.24].

¹³ Vypr (2023) 'How are Brits cooking from home in 2024' Vypr, November 2023 [Online]. Available at: <https://vyprclients.com/wp-content/uploads/2023/11/Ebook-How-Are-Brits-Cooking-from-Home-in-2024.pdf>. [Accessed 04.09.24].



JUICING ORANGE SALES ARE FLOWING

↑ +63%

The increase in sales of our organic Juicing Oranges proves that customers, despite what the major supermarkets believe, don't always care about their fruit & veg looking perfect. As long as they taste amazing. Which our Juicing Oranges do.

The boost is likely part of an overall trend for home juicing. Google searches for 'gut health juices' are up 23% year-on-year, as people catch on to the gut-health benefits of introducing a variety of fruit & veg into their diets¹⁴ thanks to the work of public health campaigners such as Dr Tim Spector and our friend at River Cottage, Hugh Fearnley-Whittingstall.

MINI WATERMELONS ARE ON THE UP

↑ +75%

First there were Microgreens. Now there are Mini Watermelons. While the popularity of regular-sized Watermelons has also gone up, it's the Mini Watermelon that's seen a dramatic spike in interest this year. In the US, 68% of consumers who purchased a Watermelon last year said they went for a mini¹⁵. And we've seen a similar trend in the UK, with sales of our organic Mini Watermelons increasing by 75% year-on-year.

The trend towards innovation in miniaturisation is likely driven by the increase in single-person households - which now make up three in 10 of UK households¹⁶. Single-person households face unique problems when it comes to food waste. With the retail environment geared towards family-sized portions, it can be hard to avoid buying more than they need. Which is where small-size fruit & veg come into their own.



THE YEAR OF THE DRAGON FRUIT

↑ +45%

Also known as pitaya or pitahaya, Dragon Fruit deserves its reputation as a superfood. Rich in phytonutrients and antioxidants¹⁷, it's the perfect choice for anyone wanting to increase the variety of fruit & veg in their diet.

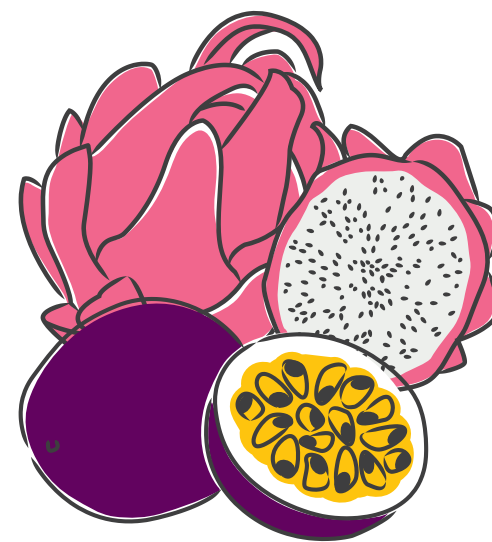
They're actually the fruit of a cactus, hinted at by their striking spiky peel. We have a mix of varieties - all organically grown with zero artificial pesticides. They used to be quite hard to source organically. We were thrilled to find **Camposeven, a farming cooperative in Spain**, who provide ours. And our customers love them.

BIG LOVE FOR PASSIONFRUIT

↑ +31%

From relative obscurity 20 years ago, to stardom. Much like the Dragon Fruit, Passionfruit's rising popularity has been driven by increasing consumer demand for tropical fruits and greater awareness of their nutritional benefits. Despite only the seeds being edible, Passionfruit is said to be packed with protective plant compounds and may help to manage blood sugar levels¹⁸.

Whether whole or the purée version, it's amazing in smoothies, desserts and - of course - cocktails. In fact, the Passionfruit-infused Porn Star Martini has been named the UK's most popular cocktail for the last 5 years¹⁹.



¹⁴ Matei, A. (2024) 'Experts say we need to eat 30 plants a week. This is how I fared', The Guardian, 4 April, [Online]. Available at: <https://www.theguardian.com/wellness/2024/apr/04/30-plants-week-gut-health>. [Accessed 04.09.24].

¹⁵ The Packer. (2023) 'Fresh Trends 2023: Just how popular is watermelon among U.S. consumers?', The Packer, 14 July [Online]. Available at: <https://www.thepacker.com/news/retail/fresh-trends-2023-just-how-popular-watermelon-among-us-consumers#:~:text=Younger%20consumers%20were%20more%20frequent,the%2040%2D49%20age%20group>. [Accessed 04.09.24].

¹⁶ Fox, A. (2024) 'Three in 10 households made up of people living alone, latest estimates suggest', The Independent, 8 May [Online]. Available at: <https://www.independent.co.uk/news/uk/ons-office-for-national-statistics-b2541473.html>. [Accessed 04.09.24].

¹⁷ Begum, J. (2024) 'What are the benefits of dragon fruit', WebMD, 4 June [Online]. Available at: <https://www.webmd.com/food-recipes/benefits-dragon-fruit>. [Accessed 04.09.24].

¹⁸ Shubrook, N. (2023) 'Is passion fruit good for you?', BBC Good Food, 13 December [Online]. Available at: <https://www.bbcgoodfood.com/health/are-passion-fruits-good-for-you>. [Accessed 04.09.24].

¹⁹ Flavours (2023) 'Passion fruit flavour of the month', Flavours, July [Online]. Available at: <https://www.flavours.co.uk/2023/07/21/flavour-of-the-month-passion-fruit>. [Accessed 04.09.24].

WHAT'S FADING



WHITE GRAPES

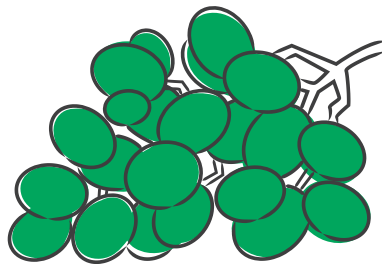
↓ -58%

It's been a challenging year for the humble White Grape. As the British public look to add more diversity to their fruit & veg shop, table grapes are being swapped for tropical fruit. But British-grown grapes are thriving, fuelling a surge in UK wine making. There are now 1,030 vineyards in the UK (a 9.2% rise) and, last year, English and Welsh wine sales grew by 10% from 2022²⁰ – a great example of farming innovation in response to a changing climate.

BRITISH CHERRIES

↓ -100%

Bad weather had a devastating impact on organic British Cherries in 2024. And they're one of the most difficult crops to grow without the use of artificial pesticides, making them financially unviable for many of our growers this year. Many are optimistic for a rebound, however, having seen their organic trees blossom early²¹.



LEAFY GREENS

↓ -18%

The surge in popularity of Leafy Greens like Kale, Cabbage and Rainbow Chard has slowed. However, we're seeing sales of unusual brassicas such as Kohlrabi going up, with an increase of 47% year-on-year.

MED VEG

↓ -6%

Spain has been affected by long periods of unseasonably hot weather and drought over the last year, which have particularly impacted the availability and quality of Peppers. We continue to expand and grow our crops of organic Med Veg from the UK in the summer months in a sustainable manner, but we're also subject to climate challenges. And for anything that can't be sourced in the UK, we have a zero air-freight policy in place.

LEGUMES

↓ -43%

Thanks to a wet winter and spring, our growers' over-wintered and early spring Pea crops were lost, and later plantings only yielded half the volume we were expecting. Our Sugar Snaps and Flat Beans did not yield at all. All a result of weather and poor germination.



²⁰ Wine GB (2024) 'UK vineyards surpass 1,000 milestone mark and sales continue to buck the wider wine market trend', Wine GB, 4 July [Online]. Available at: <https://winegb.co.uk/press-releases/uk-vineyards-surpass-1000-milestone-mark-and-sales-continue-to-buck-the-wider-wine-market-trend>. [Accessed 04.09.24]

²¹ Produce Business UK (2024) 'Picota cherries poised for rebound in UK thanks to better forecasts, new marketing campaigns', Produce Business UK, 23 May [Online]. Available at: <https://www.producebusinessuk.com/picota-cherries-poised-for-rebound-in-uk-thanks-to-better-forecasts-new-marketing-campaigns>. [Accessed 04.09.24]



ORGANIC MATTERS

We've spoken to our growers and the British public to learn what impacts them most when it comes to organic fruit & veg.



A FIGHT FOR FAIR PRICES

Consumer demand for organic has almost doubled in value since 2011²² and the average Abel & Cole order size is up 9% year-on-year. And yet, the big supermarkets are keeping prices low and failing to pay farmers fairly.

Some crops, such as Cherries, have become almost prohibitively expensive to grow organically. And a third of farmers who have stopped growing some organic fruit & veg in the last five years have done so because they can't get a fair price²³. *"The organic movement is strong, but its food prices are too low to justify growing a crop"*, said one farmer.

Organic farming is more labour-intensive than conventional methods. As a farmer, if supermarkets and other suppliers don't agree

to meet these costs, you're left with a tough choice: profit or organic.

Shoppers are conflicted. 43% actively try to make sustainable choices. But cost is stopping 27% of them from buying more organic fruit & veg.

84% of shoppers believe supermarkets and the government should be doing more to make organic farming financially viable. And so do we. It's why we've always committed to paying our farmers fairly - a value that's been at the heart of Abel & Cole since 1988 (read more on p.21).

²² The Soil Association (2023) 'The Soil Association Organic Market Report'. Available at: <https://www.soilassociation.org/certification/organic-market-report>. [Accessed 04/09/24].

²³ Survey conducted with Abel & Cole UK organic farmers, August 2024.

ORGANIC VS. REGENERATIVE FARMING

There's been rising buzz around regenerative farming as a more sustainable way to grow. But for our organic growers, the blurring line between organic and regenerative farming is presenting a new challenge.

While both organic and regenerative farming share a common goal of growing food in environmentally conscious ways, the two systems are very different.

Organic is a legally protected term. Fruit & veg can't be certified as organic in the UK unless it's been approved by an established body, such as the Soil Association. And it takes two years to convert conventionally farmed land to organic. There's no such certification process for regenerative farming.

"Organic certification offers a reliable assurance against greenwashing because the term is protected by law and organic certification is only granted to farms that are part of a whole-system approach, adhering to specific practices promoting soil health, biodiversity and ecological balance."

Clare Hadway-Ball, Senior Business Development Manager, Soil Association.

They follow different farming practices.

Take weedkillers. Organic growers won't use weedkillers to avoid impacting biodiversity and preserve the health of their land. But there are some regenerative farmers that will.

These differences are having a big impact on our organic farmers. Almost half (47%) say the regenerative movement is one of the biggest changes they'll see in the next five years. And one in 10 cited it as a reason why certain crops were already no longer viable for them to grow organically.

Generally, regenerative farming is a good thing. Just remember - not all regenerative farms are organic. Even though most organic farms are regenerative.



"Regenerative growers tend to be more eco-friendly and sustainability minded. And a lot of organic farms will, by their very nature, be regenerative."



ED AYTON
Sustainability
& Ethics Advisor,
Abel & Cole



CLIMATE CONNECTION

Unpredictable weather is the biggest challenge for our farmers. 68% rank it as their number one, after rising costs and a lack of labour. And 79% have seen their crops being impacted in the last 12 months because of it.

Scientists say that extreme weather events are only going to become more intense as a result of climate change²⁴. And yet the link between the climate crisis and our food choices is not yet fully understood.

Despite 87% of adults in Great Britain reporting that they have made changes to their lifestyles to help tackle environmental issues²⁵, our research has shown just a third (35%) think the type of food they choose has an impact on the planet. And only 15% understand the importance of farming methods in tackling the climate crisis. Proof that as an industry we need to do more to highlight more sustainable food choices.

HOPE FOR THE NEXT GENERATION

Attitudes are changing. For the good. Younger generations are most aware of the impact of farming and food choices when it comes to protecting the planet.

25-34-year-olds are most attuned to the need for sustainable farming. With 61% agreeing that farming plays a significant role in tackling climate change - almost a quarter more than the general public.

They're also the nation's biggest organic shoppers. Our study showed that 42% of 18-24-year-olds buy organic at least once a month. Making them a staggering 92% more likely to reach for organic fruit & veg than the squeezed middle generation of millennials. Only 22% of whom buy organic regularly.



Only 15%

of Brits understand the importance of farming methods in tackling the climate crisis

THE FUTURE OF FARMING IS LOOKING BRIGHT

There are serious challenges facing our British farmers, but they remain optimistic about the future. Many report positive changes they're looking forward to in coming years, including:

- ✓ Better subsidies for organic farming and more support from the government.
- ✓ Opportunity to diversify organic crops in response to a warmer climate.
- ✓ More demand from consumers giving them a chance to extend their ranges.
- ✓ The emergence of new technology to meet the unique demands of organic farming.
- ✓ Shorter conversion times when switching to organic - so they can reap the benefits faster.

²⁴ IPCC Sixth Assessment Report (2021). Available at: <https://www.ipcc.ch/report/ar6/wgl1/> [Accessed 04.09.24]. Climate Change 2021: The Physical Science Basis. Working Group I Contribution to the IPCC Sixth Assessment Report.

²⁵ Office for National Statistics (2023) 'Most adults report making some changes to their lifestyle for environmental reasons', 5 July [Online]. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing/articles/mostadultsreportmakingchanges to their lifestyle for environmental reasons/2023-07-05#:~:text=More%20than%20eight%20in%20ten,between%20May%20and%20June%202023> [Accessed 04.09.24].





STATE OF THE ORGANIC NATION

The challenges on the horizon
for organic farming.



Flooded fields at Jersey Quality Produce

WATER WOES

From flooding to extreme drought in a matter of months, the climate crisis is resulting in extremely unpredictable weather. And 68% of British farmers we asked said unpredictable weather conditions are their top concern.

Water is one of the biggest – if not the biggest – challenge for farmers. Organic and non-organic alike. Without good soil health or irrigation methods, farmland can't cope with flooding. Without adequate water reserves, sensitive crops won't make it through drought. And all crops are impacted.

While reservoir levels have almost fully recovered after last summer's drought, large areas of the UK are still at risk of water shortages. The figures show that there are large discrepancies across the country, with regions including the South West and East experiencing low water levels²⁶.

We're seeing more British farmers moving towards protected crops, such as Tomatoes which can be grown in polytunnels. And Peter

Bevan, Agronomist at Abel & Cole says, "There's a reality that we won't be able to rely solely on British growers for things like Carrots and Onions because the challenges around water make the crop too risky."

Compared to carbon emissions and biodiversity, no-one is talking about the water crisis. And yet, it's a challenge that there are no shortcuts for.

HOW ABEL & COLE ARE FIGHTING BACK:

We're working with growers to help make their farms – and businesses – more resilient. We take crops early to avoid problems of waterlogged land later in the season. We're helping farmers transition to more resilient crop varieties. And we're sharing our technical expertise wherever it's needed.

Tech and innovation are the solution – and investment is needed to make this happen.



“Wind and rain are our biggest enemies here on Broadward Hall Farm – and they usually come together. We had a very wet winter and spring, which meant we delayed planting. And because of the cold, the soil temperature was impacted, and the biology wasn't active. The wet, mild season has also meant we have seen a plague of slugs and the worst cases of mildew we've seen in years. Wind also hit our vegetables hard, because they wilt in hot, dry, windy conditions and you see things like tip burn on Lettuce.

We have some great hedges that give some protection from wind and are looking into building shelter belts and planting more trees. But as a tenant farm, we're limited as to what we can and can't do.”

BEN ANDREWS, BROADWARD HALL FARM

Supplier of Whole Head Lettuces, Mixed Leaf Salad Bags and Brassicas, as well as Sunflowers, to Abel & Cole since 2006

²⁶ Draper, J. (2023) 'UK reservoirs 'recovered' after widespread drought', The Independent, 26 April [Online]. Available at: <https://www.independent.co.uk/climate-change/news/yorkshire-water-east-england-south-west-rebecca-pow-devon-b2327263.html>. [Accessed 04.09.24].



PLASTIC

According to Greenpeace, a truckload of plastic enters the ocean every single minute. And yet, UK supermarkets produce 800,000 tonnes of it every year. In fact, the UK produces more plastic waste per person than almost any other country²⁷.

"Billions of pieces of fruit & veg packaging are thrown away every year, which makes fresh produce one of the leading causes of plastic waste."

Daniel Webb, Founder & Director, Everyday Plastic.

We only use packaging if it genuinely serves a purpose, like preventing food waste. That means there's zero pointless plastic in our boxes. And to make sure we're cutting back wherever we can, we regularly analyse the amount of plastic used in our organic Medium Fruit & Veg Box.

We undertook our latest comparative study with plastic campaign group Everyday Plastic in Nov/Dec 2023. The results showed that, thanks to the efforts of our brilliant teams and suppliers, we use 80% less plastic on average in our Fruit & Veg Boxes, compared to four major, UK supermarkets²⁸.

We're continuing to work with our supply chain to eliminate single-use plastic as much

as possible. In the meantime, Plastic Pick-Up - our game-changing doorstep recycling scheme - helps reduce waste of hard-to-recycle flexi-plastics. Only 16% of UK councils collect these materials direct from people's homes²⁹, so they're challenging for most of us to recycle consistently and effectively. Whereas our shoppers can send us their flexi-plastics from any retailer for us to recycle responsibly in the UK.

"In 2023, we collected nearly 80 tonnes of flexible plastic packaging and successfully recycled 80% of this into useful films for the construction industry."



HUGO LYNCH
Sustainability Lead,
Abel & Cole

HOW ABEL & COLE ARE FIGHTING BACK:

To ensure we're continually challenging ourselves to remove plastic and use less than the supermarkets, we've set ourselves an even more ambitious target for our fruit & veg packaging. Throughout the year, regardless of season, we'll continue to use at least 77% less plastic on average in our Fruit & Veg Boxes.

PESTICIDES

Pesticides are poisons designed to kill living organisms. They can easily contaminate the air, ground and water when they run off from fields, or are not stored properly. And they can have a devastating effect on biodiversity³⁰.

Each year, Pesticides Action Network UK (PAN) publishes their list of the 12 fruit & veg most likely to contain residues of two or more pesticides. With Peaches (85%), Grapes (84%) and Strawberries (83%) topping their 'Dirty Dozen' list in 2023.

Conventional farming practices allow UK growers to use up to 428 different types of pesticides. Organic farmers can only use 28. And they need to be of a natural origin.

Organic farmers never use harmful, artificial pesticides. And even view natural pesticides as a last resort - only looked to once all other natural ways to deal with pests have been explored. While this is great news for consumers

of organic fruit & veg, it does make things very tough for growers wanting to become organic certified. As they transition to organic, there's support available to help farmers understand how to make organic farming profitable and ensure their business model is financially viable.

And, in the long term, fewer pesticides mean greater biodiversity and more resilient crops. Good for farmers. Good for people. And good for the planet.

HOW ABEL & COLE ARE FIGHTING BACK:

We'll continue to support farmers as they make the transition to organic. We firmly believe that pest prevention is better than cure. So, our Responsible Supplier Programme (our own internal audit of sustainability practices) focuses on biodiversity to naturally control them, and we'll always champion farmers who are doing right by nature.

“ We do everything we can to avoid using any pesticides and encourage biodiversity on site. We even buy insects such as ladybirds and bees to help encourage pollination whilst naturally warding off pests such as aphids - ladybirds eat aphids. At Foskett Farms, our attitude is we welcome insects and pollinators to help grow the crop. You need to look after nature in order for it to help you. **”**



NIKOLA TONEV, OF JAMES FOSKETT FARMS

Supplier of Legumes, Roots and Sweetcorn to Abel & Cole since 2009

²⁷ Greenpeace [Online]. Available at: https://www.greenpeace.org.uk/challenges/plastic-pollution/?gad_source=1&gclid=CjwKCAjwaa2BhAIEiwAQBgYHmByn_8sg3-mVydIkV7Qrz4CCg4MTAz_grUFJ_3d0Fu3DdCRh7nRoC-RwQAvD_BwE. [Accessed 04.09.24].

²⁸ Abel & Cole (2023) 'Our 80% less plastic study: November 2023' [Online]. Available at: <https://www.abelandcole.co.uk/Blog/post/our-80-less-plastic-study-november-2023-update>. [Accessed: 04.09.24].

²⁹ WRAP (2023) 'The UK Plastics Pact Annual Report 2022-2023' WRAP. Available at: <https://www.wrap.ngo/resources/report/uk-plastics-pact-annual-report-2022-23>. [Accessed 04.09.24].

³⁰ Pesticide Action Network [Online]. Available at: [https://www.pan-uk.org/our-environment/#:-text=Impacts%20of%20pesticides%20on%20the%20environment&text=Pesticides%20easily%20contaminate%20the%20air,when%20they%20are%20sprayed%20aerially](https://www.pan-uk.org/our-environment/#:-text=Impacts%20of%20pesticides%20on%20the%20environment&text=Pesticides%20easily%20contaminate%20the%20air,when%20they%20are%20sprayed%20aerially.). [Accessed 04.09.24].



TURNING TOWARDS THE LIGHT

Every challenge presents an opportunity. There's plenty to be optimistic about for the future of organic fruit & veg. Here's what we have to look forward to in the coming year.

ORGANIC GOING FROM STRENGTH TO STRENGTH

Despite squeezed household budgets, consumers aren't losing their appetite for organic. Sales of our organic British Veg Boxes have gone up by 10% year-on-year - demonstrating our customers' desire to support British farmers and buy UK-grown whenever possible. In fact, more than half of the people we surveyed (53%) say they actively try to buy British produce.

And we're not alone. More than two-thirds of independent retailers are also expecting sales growth in 2024³¹.

According to reports, the number of 'Eco-active' shoppers - those most engaged with sustainability - is growing steadily too. In 2023, they made up 33% of all shoppers in Great Britain, compared with 24% in 2022³², and our research revealed that 43% of Brits now actively try to make sustainable choices when they shop.

"We've championed organic farming for over 35 years, as a tried, trusted and tested way of farming. So, we're thrilled to see this increased appetite for organic and look forward to continuing to help our shoppers understand why organic is truly food done right. For people and our planet."



HANNAH SHIPTON
Managing Director,
Abel & Cole

HOME-GROWN FRUIT & VEG GETTING HEAVYWEIGHT BACKING

We were heartened to see charities and celebrities team up to pressure the government to Back British Growers.

An open letter co-ordinated by the Soil Association³³, which we signed, called on Keir Starmer to back and scale up the UK horticulture sector. Signatories include Hugh Fearnley-Whittingstall and Anna Jones alongside Environment charities including Sustain and The Wildlife Trusts. In it, they say we urgently need more home-grown fruit & veg, or else *"we face further disaster for supermarket shelves, our health, and the environment."*

Lucia Monje-Jelfs, Farming Policy Officer at the Soil Association, adds: *"The UK must stop relying on imports and fix diets by doubling the land used to grow fruit and vegetables and backing British, nature-friendly farming."*

As a result, political parties have already pledged support for local sustainable food targets in public sector procurement³⁴. This has been a major catalyst for organic sector growth in other countries.

We're 100% behind the campaign. As are two thirds of the British public we surveyed (64%), who said that the government and supermarkets should do more to help farmers engage in organic practices.

"We have a 'Buy British First and Foremost' strategy. Supporting British farming is part of building our food security. And to support our farmers we need to pay them fairly and cover their costs of production. We're focused on the delivery of high-quality, locally and sustainably grown produce, preserving our land for future generations."

Caroline Dodds, Fresh Produce Buying Manager, Abel & Cole

^{31 + 32} The Soil Association (2024) 'The Soil Association Organic Market Report'. Available at: <https://www.soilassociation.org/certification/organic-market-report>. [Accessed 04.09.24].

³³ The Soil Association (2023) 'Horticulture open letter'. Available at: <https://www.soilassociation.org/media/27458/horticulture-open-letter-final180724.pdf>. [Accessed 04.09.24].

³⁴ White, K. (2024) 'General election: What are the main parties promising on food and farming', The Grocer, 14 June [Online]. Available at: <https://www.thegrocer.co.uk/politics/general-election-what-are-the-main-parties-promising-on-food-and-farming/692405.article>. [Accessed 04.09.24].



**Organic Carrots growing
on Foskett Farms, Suffolk**



THINGS ARE HEATING UP FOR MED VEG IN THE UK

The challenges of rising temperatures can present some opportunities for certain British growers, who respond to changing weather conditions through innovations. Organic produce we think of as traditionally Mediterranean can now be grown in the UK without the use of heated polytunnels.

And it's not just the temperature that's hotting up. With warmer weather come longer days and more daylight hours. A real bonus for those in the Tomato market – a crop that needs plenty of sunshine to thrive in Britain.

"At Master Farms in Jersey, we grew organic Tomatoes for 10-15 years in the late 90s/early 2000s, but then stopped due to produce being imported more cheaply from Europe. However, due to climate change and the increase in demand for British produce, we have started growing them again these last five to six years. We're even converting more land to organic and expanding our polytunnels to better support this."

Matthew Le Maistre from Master Farms, Jersey, supplier of organic Tomatoes to Abel & Cole since 2010.

Not only is Med Veg becoming more commercially viable to grow (heating polytunnels all winter is costly), having more choice allows growers to diversify their offerings. And farmers are using the opportunity presented by warmer weather to give more of their land over to other organic produce.

"We began planting our vines in 2021 using mostly traditional French varieties – something 20, 30 years ago you wouldn't have thought was possible. Now, the English wine market is booming. A positive by-product of the warmer climate and hey, who doesn't want a vineyard in their garden!"

Martin Soble, Whitethorn Farm

"Our ambition is to work closely with our farmers to increase volumes of Med Veg grown in the UK, in the summer. We've had great successes with crops like Padron Peppers and Chillies, but it takes time to scale up and growing these crops in the UK is not without its challenges."



CAROLINE DODDS
Fresh Produce Buying
Manager, Abel & Cole

A BOOM IN BIODIVERSITY

Biodiversity decline is a global threat. But the Soil Association are confident that organic farmland will continue to increase as organic farming scales up to meet consumer demand in the UK. The Scottish government has committed to doubling the area of organic land by 2026 and this has been backed up with financial incentives. The Soil Association has already seen a significant increase in applicants. Last year in Scotland, there was a 7% increase in fully organic land in Scotland.

This is good news because organic farms are havens for wildlife. They provide homes for bees, birds and butterflies and have on average 30% more biodiversity³⁵. An organic grain field, for example, will be home to seven times more

bees³⁶. Or take Strawberries. On an organic Strawberry farm, there will be a greater diversity of insects to do the pollinating. Meaning the fruit is bigger, sweeter and juicier – as Strawberries should be.

Biodiversity benefits farmers. It improves soil health and ensures farmers can deliver produce all year round. Plus, natural pest control means less reliance on pesticides.

"Organic is better for wildlife diversity," said Clare Hadway-Ball, Senior Business Development Manager at the Soil Association. "And wildlife diversity is better for organic farming. It's a virtuous circle which we look forward to seeing grow."



“Farmland covers around 70% of the UK, so farming has to be at the forefront of reversing the biodiversity decline. With a mixed farm like ours, every enterprise is connected to another and gives us a range of different habitats. Nothing exists in a vacuum.

We're doing our bit to help with biodiversity. For us, birds play one of the biggest parts in our ecosystem. Different birds require different habitats, and feed on different insects, seeds, mammals or other birds. It's all part of the food chain and one which impacts what we grow. We leave some less productive areas of arable crops unharvested for the birds to feed on the grain over the winter and plant some field margins with a blend of seeds to again sustain birds over colder months.

We even spotted a Corn Bunting at the farm – a breed which hadn't been seen in Herefordshire in over 10 years. So sometimes not doing something can truly be the best thing. ”

BEN ANDREWS, BROADWARD HALL FARM

Supplier of Whole Head Lettuces, Mixed Leaf Salad Bags and Brassicas, as well as Sunflowers, to Abel & Cole since 2006



³⁵ The Soil Association, 'Organic farms are havens for wildlife' [Online]. Available at: <https://www.soilassociation.org/take-action/organic-living/why-organic/better-for-wildlife>. [Accessed 04/09/24].

³⁶ The Soil Association, 'Our bees are incredible' [Online]. Available at: <https://www.soilassociation.org/take-action/growing-at-home/bee-organic/10-facts-about-bees>. [Accessed 04/09/24].



Organic Apples growing on
Whitethorn Farm, Herefordshire

ORGANIC FIGHTS BACK AGAINST THE LOSS OF HERITAGE VARIETIES

43% of consumers we surveyed want more choice of fruit & veg to be available at the supermarket. And yet, conventional, non-organic farmers must still focus on 'champion' varieties.

Take Apples. Britain is home to hundreds of varieties. At least 30 in Sussex alone. Yet even in peak season, you're more likely to find 'champion' varieties such as the Pink Lady, imported from New Zealand, in your local supermarket³⁷.

This is resulting in a monoculture in the fruit & veg aisles of British supermarkets. Which means that more unusual varieties of fruit & veg are at risk of vanishing.

"Often supermarkets will have certain types of Apples licensed to them - so they effectively have the rights to some varieties. They all need to be grown to a certain size, have the perfect red skin, etc. Not on our farm - we're all about embracing variety. In fact, of the 12 Apple varieties we grow, you're unlikely to find a single one in your everyday supermarket."



MARTIN SOBLE

Whitethorn Farm

Supplier of organic Apples
to Abel & Cole since 2004

Organic farms, on the other hand, often grow lots of different crops. This helps build resilience in supply - with greater variety, farmers get more flowering and harvesting opportunities throughout the year. That means more products to sell and a more reliable income. And also means greater biodiversity and more natural pest control.

"Having lots of varieties of Apples on our farm helps boost biodiversity," Martin says. "Our flowering seasons all overlap which means pollination is more reliable. You see lots of insects and pollinators on organic farms - but that's a good thing! The insects will help pollinate the fruit. Then the mice feed on the insects, the plant seeds feed the voles and then the kestrels and owls prey on the mice and voles, and so on."

Greater variety isn't just good for farmers. It's good for consumers too.

Studies³⁸ still suggest that eating five portions of fruit and vegetables a day can have a significant positive impact on your long-term health. But experts such as Dr Tim Spector now believe that eating a variety of plants could be just as important. Spector highlights that this is because the gut microbiome thrives on a varied diet³⁹.

³⁷ Ghanimi, A. 'The peril facing Britain's fruit and veg', Sustainable Food Places [Online]. Available at: <https://www.sustainablefoodplaces.org/blogs/may24-peril-facing-britains-fruit-and-veg>. [Accessed 04.09.24]

³⁸ Dong D. et al. (2021) 'Fruit and Vegetable Intake and Mortality', AHA Journals, Volume 143, Number 17, Doi:10.1161/CIRCULATIONAHA.120048996. Available at: <https://www.ahajournals.org/doi/10.1161/CIRCULATIONAHA.120048996>. [Accessed 04.09.24]

³⁹ Kenny, S. (2024) 'A top nutrition scientist eats 30 plants a week for gut health. His 'diversity jar' makes it easy', Business Insider, 28 May [Online]. Available at: <https://www.businessinsider.com/improve-gut-health-30-plants-week-tim-spector-diversity-jar-2024-5#-text=The%20diversity%20jar%20helps%20Spector%20health%2C%22%20he%20said>. [Accessed 04.09.24]



TREATING OUR FARMERS FAIRLY

Farming is one of the most demanding livelihoods there is. But like us, farmers know that difficult is worth doing. That's why Abel & Cole are committed to partnerships that are fair and collaborative.

COLLABORATIVE CROP PLANNING

Each farmer and each farm is unique. What supports one, won't help another. So, we always take an individual and collaborative approach.

Our Buying teams discuss volumes and prices with our fruit & veg farmers well in advance of harvesting. In most cases, these talks happen even before planting. These ongoing, long-term planning discussions demonstrate our commitment to these partnerships and give them the security to be able to plan ahead. And by being transparent and committing to volumes, crops are grown to order, so there's no food waste.

And then, we keep up the conversation with our organic farmers. About how the season is going. And what challenges they're facing.

If they have a surplus, we can discuss taking it. If a crop fails due to bad weather, we do what we can to help make up for the loss, such as increasing support of their other crops or raising the price, if possible.

We have our own in-house Agronomist, who can help our farmers through challenges such as poor crop performance or pests. And we support farmers who want to transition their crops, whether from non-organic to organic or to meet consumer demand.



WE PAY FAIRLY

We're a proud Living Wage employer. But our responsibility doesn't end there. We want everyone in our supply chain to be paid a fair price for their hard work. And according to a recent survey, 88% of the British public agree with us⁴⁰.

When it comes to pricing, honesty is everything. We talk through any increases due to variables. We don't drive our farmers down on price. Instead, we come to mutually beneficial agreements. And if there are problems, we work through them together.

We understand how labour-intensive organic growing is. And we believe that everyone should be making a profit. We've worked directly with organic farmers since day one. We've built long-lasting partnerships (some measured in decades) and are always looking for ways to back them further.

⁴⁰ Food, Farming & Countryside Commission (2023) Food, Farming and Countryside Commission Survey 2023, 14 December [Online]. Available at: Annual report 2022-23 - Food, Farming and Countryside Commission (ffcc.co.uk). [Accessed 04/09/24].



“ Considering the many pressures faced by farmers today, it's essential that we continue this level of support, and focus on building partnerships that work for our customers, our farmers and ourselves. ”

ED AYTON

Sustainability & Ethics
Advisor, Abel & Cole



A FINAL WORD

Thank you for reading our first report dedicated to organic fruit & veg – something we've championed for over 35 years. In fact, it's where the Abel & Cole story began back in 1988, when our founder Keith Abel started selling organic potatoes door-to-door. To this day, **we believe that organic fruit & veg is food done right - better for people and our planet.** That's why it remains a core part of what we do.

Each year brings new challenges and opportunities for our organic farmers. But **one thing never changes – our steadfast commitment to our growers.** We know the incredible effort it takes to grow delicious, top-quality organic fruit & veg. And we're so proud of their resilience, innovation and dedication to bringing our shoppers the very best produce.

The passion of our own expert team and our organic growers jumps off every page of this report. I hope it inspires you to add a little organic fruit & veg to your basket, whenever you can.

Warmest wishes,

Hannah Shipton
Managing Director



Abel & Cole



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Officially certified by the UK's leading organic accreditation body, The Soil Association. Abel & Cole is a certified B Corp, dedicated to making business a force for good. Certified as a carbon neutral business by One Carbon World. Rated 4.5 by our customers on Trustpilot. Our zero air miles policy means we never air-freight a thing.