

COVID-19 UK Veg Box Report

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Food Foundation

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In collaboration with

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With thanks to veg box schemes for taking time to respond during this busy period

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About the Food Foundation

The [Food Foundation](#) is a charity working to influence food policy and business practice, shaping a sustainable food system which makes healthy diets affordable and accessible for all. We work in partnership with researchers, campaigners, community bodies, industry, investors, government and citizens to galvanise the UK's diverse agents of change, using surprising and inventive ideas to drive fundamental shifts in our food system. These efforts are based on the continual re-evaluation of opportunities for action, building and synthesising strong evidence, convening powerful coalitions, harnessing citizens' voices and delivering impactful communications.

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About the CSA Network UK

The CSA Network UK is a membership organisation that brings together [Community Supported Agriculture \(CSA\)](#) farms to connect, exchange their skills and knowledge and promote a fairer, more transparent model of food production, where the risks and rewards are shared.

About Better Food Traders

[Better Food Traders](#) supports ethical businesses to sell sustainably grown fresh fruit and veg.

SUMMARY OF FINDINGS

In order to evidence reports that veg box schemes were experiencing unprecedented increases in demand as a result of COVID-19, the Food Foundation, the CSA Network UK and Better Food Traders gathered and collated evidence from 101 UK veg box schemes during April 2020.

Data from online and phone surveys of 101 veg box schemes across the UK shows that they have doubled the number of veg boxes being sold weekly as a result of the coronavirus pandemic. Sales went up by 111% overall during the six weeks from the end of February to mid-April. The highest rates of growth were seen by smaller box schemes (supplying up to 300 boxes per week) who grew sales by 134%.

Overall, the 101 box schemes have delivered around 0.7 million boxes of fresh produce over the last six weeks to households across the UK. With an estimated 500 box schemes in the UK (pre-COVID-19) this means that 3.5 million veg boxes are likely to have been delivered by box schemes since the beginning of March. But they could provide more. 82% of box schemes now have waiting lists and are closed to new orders. The average box scheme waiting list is 160. The largest box scheme has a waiting list of 6,700. It is difficult for schemes to estimate how many customers they are turning away, but many think the number is in the hundreds. If waiting lists were met, and the customers being turned away were supplied instead, then an estimated 5.3 million veg boxes could be supplied over the next six weeks.

65% of box schemes are actively prioritising key workers, the vulnerable or isolating. The most common way this is being done is by moving key workers and vulnerable groups up waiting lists and prioritising them for orders as well as offering delivery to those who are self-isolating. Deliveries in many cases are being organised through a network of volunteers.

10% of box schemes have created systems to help the economically vulnerable. These include offering cheaper boxes for those suffering financial hardship and giving members who could afford it the option of paying a little more to subsidise boxes for those struggling financially.

The survey further asked what support would enable producers to upscale deliveries. It is useful to provide some context in order to understand answers to this question. Since EU Common Agriculture Policy reform in 2003, farmers have been subsidised to produce food through direct payments based on land area, but in the UK subsidies were not made available to farms under five hectares. This means that, as horticultural businesses tend to be smaller, they have received on average one of the smallest amounts of subsidy of any farm type and many have received none at all. According to DEFRA's [analysis](#) of Farm Business Income (from 2014 to 2017), government subsidy accounted for 10% of the income of horticulture holdings, versus 79% for cereal producers. Fruit and vegetable production therefore, particularly production on under five hectares, has been underinvested compared to other farming sectors for at least 17 years. This, despite the fact that [fruit and vegetables](#), with the possible exception of oily fish, are the only food group of which the government recommends we eat more.

Perhaps unsurprisingly, given the context, the most frequently mentioned support required for box schemes to upscale fruit and vegetable supply was investment, in the form of small grants for box schemes. This investment would help with staffing, infrastructure such as polytunnels, delivery vehicles, cold stores and packing houses and specific supplies for deliveries such as boxes, cleaning and personal protective equipment.

The second most mentioned was a need for a national and long-term vision for a sustainable food and farming system. With a move away from area-based payments to payments based on delivery of public goods under new post Brexit agriculture policy, it is hoped that fruit and veg producers who run box schemes will experience a more equal playing field. In the meantime, new customers could consider supporting their box scheme long-term so they are there to supply fresh produce in local communities across the country in years to come.

BACKGROUND

In the week beginning the 16th April, the Food Foundation, the CSA Network UK and Better Food Traders gathered evidence on increased demand for veg box schemes across the UK, the steps schemes were taking to prioritise the vulnerable and what support they would need to expand capacity.

The most recent DEFRA [datasets](#) estimate there are 1,065 commercial horticultural holdings under five hectares in England, although not all of these are selling through box schemes. Pre-COVID-19, it is [estimated](#) that there were 500+ box schemes in the UK.

METHODS

101 schemes took part in this study: 63 via an online survey (which was publicised through participating organisations and their networks), and 38 directly via one-to-one phone calls. Box schemes on the Soil Association box scheme [list](#) were targeted for the phone calls. Specifically, schemes were asked:

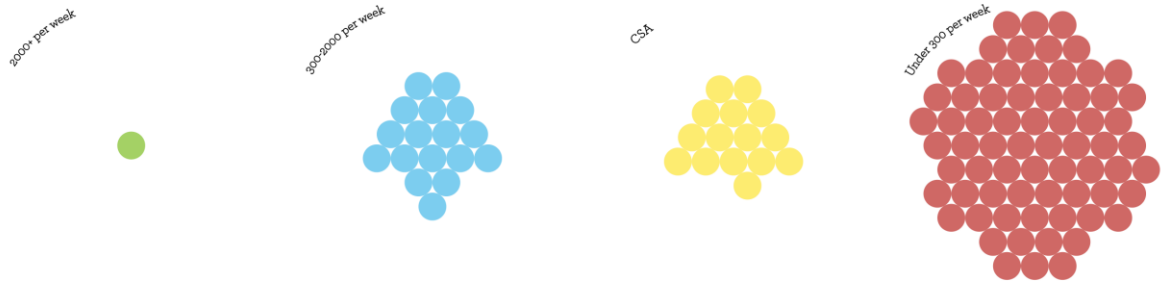
1. How many veg boxes did you sell:
 - a. Before the coronavirus crisis (i.e. last week of Feb)?
 - b. Now (i.e. week beginning 13th April)?
2. How many people do you have on your waiting list or have you had to turn away?
3. Are you taking steps to prioritise vulnerable people? If yes, what sorts of things are you doing?
4. Is there anything that can be done to support you going forward?

Veg boxes refer to boxes which contain fruit as well as veg. Some schemes buy in all their produce, which may be from wholesale or local producers, others grow a percentage themselves and supplement from wholesale and other producers. Others only supply what they grow themselves and obviously this tends to be seasonal.

Since COVID-19 there has been an expansion of the number of box schemes that buy in all their produce from wholesale suppliers and not necessarily from local producers. The majority (67%) of the schemes in this survey were small scale producers regularly supplying up to 300 veg boxes per week pre-COVID-19, mostly organic, in their local communities. 15 were Community Supported Agriculture (CSA) schemes also supplying under 300 boxes a week, but these were separated in the analysis due to a different sales model. 17 were larger box schemes supplying between 300 and 2,000 boxes a week, and one was a large-scale organic box scheme supplying 55,000 boxes weekly pre-COVID-19.

There is a great deal of variation in size of veg box but the weight of a medium veg box is likely to be around 5kg, enough to supply just over the government recommended requirement of fruit and veg for one person for a week.

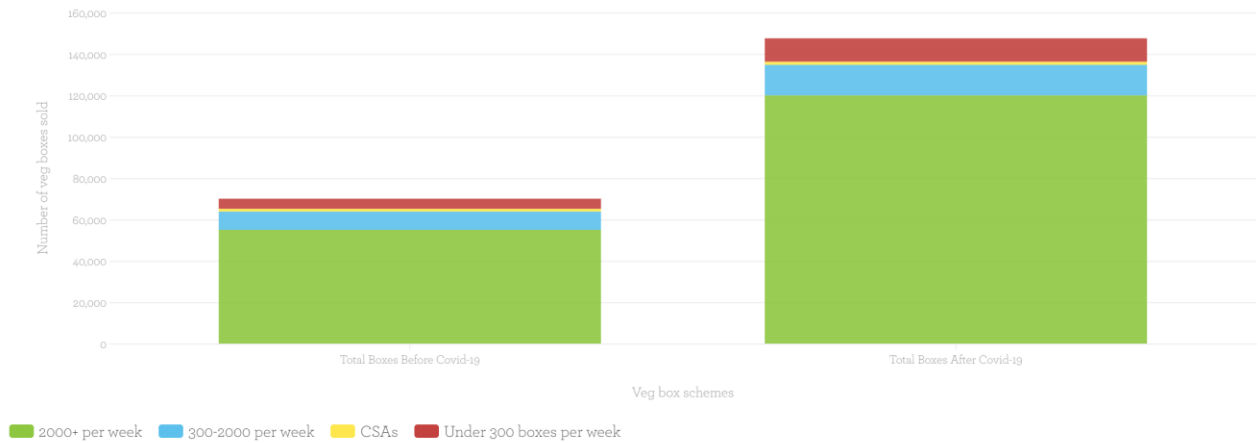
Types of veg box schemes surveyed



VEG BOX SALES

Before the impacts of the coronavirus pandemic were felt, 101 schemes sold 70,029 boxes a week (last week of February). By the week beginning the 16th April (i.e. six weeks later) they had more than doubled sales and were delivering 147,564 boxes.

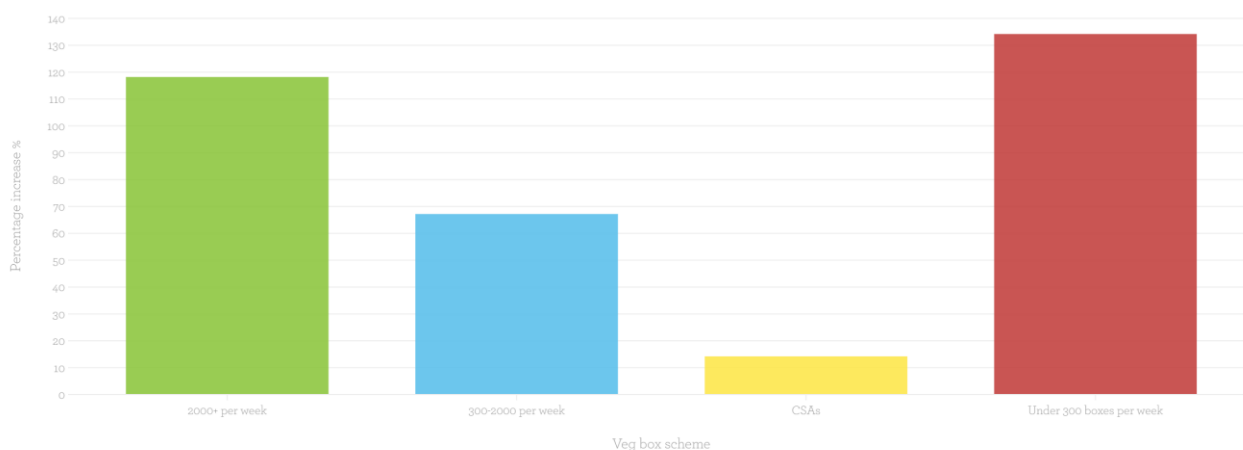
Veg box sales before and after covid-19



Number of schemes	Size by weekly boxes pre-COVID-19 (CSAs all under 300 but separated)	Total boxes before crisis (last week Feb)	Total boxes week of 16 th April	Average per scheme before	Average per scheme after	% increase
15	CSAs	1,352	1,548	90	103	14%
68	Under 300 boxes	4,837	11,289	71	166	134%
17	300-2,000	8,840	14,727	520	866	67%
1	2,000+	55,000	120,000	55,000	120,000	118%
101	All	70,029	147,564	693	1,461	111%

On average overall, box schemes have upped sales of boxes by 111%. The majority of the increase in numbers has come from the largest box scheme with orders increasing from 55,000 to 120,000, an increase of 118%. The highest rates of scaling up sales of 134% has been seen by the 68 box schemes (not including CSAs) delivering under 300 boxes a week. These went from delivering on average 71 to 166 boxes per week.

Percentage increase of veg boxes sold before and after covid-19



CSAs showed the smallest increase, averaging 90 boxes before and 103 after, an increase of 14%. This is likely to be a reflection of their model. The CSA Network UK notes that:

CSAs are designed specifically to produce food for the number of members they have. Many CSAs also have a strong commitment to grow most if not all of their veg, which makes it difficult to expand on short notice. Despite this, some CSAs have taken on new members, stretched resources to supply vulnerable citizens or have increased cropping plans to allow more members to join later in the season. Although CSAs haven't increased their numbers as rapidly as box schemes, the general resilience of the model has been seen in other ways. Except for changes to allow for social distancing and more strict hygiene practices, most CSAs have carried on more or less as usual. The long-term partnership between producers and members, fundamental to CSAs, has meant a pool of volunteers are available to help with tasks such as delivering to vulnerable members or filling in if staff have to self-

isolate. If the CSA model were to be replicated in every community, this self-supporting network would be able to keep local, fresh and healthy produce flowing to all citizens in times of crisis.

Taken overall, over the last six weeks, 101 box schemes have delivered around 0.7 million boxes of fresh produce to households across the UK. With an estimated 500 box schemes in the UK (pre-COVID-19) and, assuming the sample is broadly representative, this means that 3.5 million veg boxes have been delivered from box schemes since the beginning of March. But they could supply more.

WAITING LISTS AND THOSE TURNED AWAY

Due to increases in demand and capacity issues, 82% of box schemes now have waiting lists and are closed to new orders. 16,190 people are on the waiting lists of these 101 schemes, an average of 160 people per box scheme. The largest box scheme has a waiting list of 6,700. It is difficult for schemes to estimate how many customers they are turning away, but many think the number is in the hundreds:

“We've had to turn away literally hundreds (by phone and email).”

“... took shop page off website and made answerphone message saying no new orders, so could be hundreds more...”

“..turning away 20-30 a week”

At current levels of orders, if the waiting lists were met and schemes able to take on extra customers currently being turned away, then 500 box schemes could supply an estimated 5.3 million veg boxes over the next six weeks.

ACTIVITIES TO PRIORITISE THE VULNERABLE

65% of schemes are actively prioritising key workers, the vulnerable or isolating. The most common way this is being done is by moving key workers and vulnerable groups up waiting lists and prioritising them for orders as well as offering delivery to the isolating. Deliveries in many cases are being done through a network of volunteers from the usual membership:

“[we are] linking members up who are able to deliver to more vulnerable customers.”

“each of our 8 veg box drop off points [has] a volunteer able to drop food to people in isolation...”

Other activities mentioned are taking on elderly customers who do not have access to internet shopping, offering different time slots for the vulnerable, donating veg for meals for NHS staff, providing mental health support and signposting people to help.

10% of box schemes have created systems to help the economically vulnerable. These include offering cheaper boxes for those suffering financial hardship and giving members

who could afford it the option of paying a little more which is then used to offer boxes at reduced cost to those who are struggling financially. Other schemes are offering free veg bags and giving veg to local food banks or other social centres organising a food parcel distribution to people in need. One scheme had established a 'community champion networks' to distribute free food bundles to the most vulnerable in the community.

The following quotation reflects the demands being felt by box schemes and their determination to help in their communities during the crisis:

“It has been an amazing time for the business but also an overwhelming and challenging time in trying to help so many people. We have cried after calls from vulnerable people and we can only source and deliver what we can.”

SUPPORT REQUIRED

Again, it is useful to provide some context in order to understand how could veg boxes serve more people. EU Common Agriculture Policy (CAP) reform in 2003 meant that farmers in the UK became subsidised to produce food through direct payments based on land area. In the UK, subsidies were not made available to farms under five hectares. This meant that, as horticultural businesses tend to be smaller, they received on average the smallest amounts of subsidy of any farm type, apart from poultry. According to DEFRA's [analysis](#) of Farm Business Income (from 2014 to 2017), government subsidy accounted for 10% of the income of horticulture holdings, versus 79% for cereal producers.

This means that fruit and vegetable production, particularly production on under five hectares, has been underinvested compared to other farming sectors for at least 17 years. This, despite the fact that [fruit and vegetables](#), with the possible exception of oily fish, are the only food group of which the government recommends we eat more. Despite this they have continued to produce fruit and veg, many using production methods (such as organic) which have been delivering environmental benefits. With a move away from area-based payments to payments based on delivery of public goods under new post-Brexit agriculture policy, it is hoped that fruit and veg producers will experience a more equal playing field.

This has meant that producers running box schemes often earn very little. This quotation sums up the situation being experienced by many of the box scheme providers:

“We need to earn more than £3.20 an hour for farming – we run a successful, fully subscribed veg box scheme with 85% of produce grown on our own farm, and 150 customers in remote rural areas. But we, the two farmers, are self-employed and earn only £3.20 an hour for our work. This is one third of the living wage, and we rely on benefits to top up our wages. The reasons behind this are many: small farm size; low food prices for imports; no farm subsidies; supermarket discounting and price competition; no charges for pollution in food production and transport, etc. Why are 'key workers' like us earning a third of the minimum wage? This income inequality needs to be addressed urgently. And until it is, very few farmers will want to move into local food production and increase the supply to meet rapidly rising demand.”

Perhaps unsurprisingly, given the context, the most frequently mentioned support required was investment. The second was a need for a national and long-term vision for a sustainable food and farming system. Other support measures suggested, in order of frequency of mention, were administrative and software help, linking up supply, planning permission and local authority support, farm specific social distancing guidance, training and apprenticeships and marketing. These are discussed in more detail below.

Investment

The majority of schemes (63%) said that investment would help them to increase supply, these included investment for staffing, infrastructure such as polytunnels, delivery vehicles, cold stores and packing houses, specific supplies for deliveries such as boxes, cleaning and personal protective equipment. Many mentioned that small grants for box schemes would help:

“We have had to take on more labour and purchase another vehicle and various packaging etc. Perhaps it would have been great to have grants available from the government for growers/farmers selling direct to local communities when setting up a box scheme or similar.”

“[We need] small grants (e.g. £10-20k) to pay for expansion such as polytunnels or rental of bigger packing space or delivery vehicle or to subsidise deliveries.”

The reason behind asking for grants is likely to be because of the stretched financial situation that box schemes are already experiencing, as well as the concern that sales will drop off when social distancing measures are relaxed, and if shopping habits go back to normal. This quotation summarises the point:

“We are now in talks to increase capacity by adding an extra day of packing and delivery to add another 150-200 bags, but this will need a lot of thought and financial planning, and we are worried about the drop off in numbers.”

While many schemes expressed hope that new customers will stay with them, they recognised that many will not, so there is a risk to upscaling production. This is the month when producers are planting for the summer and winter crops ahead, and there is a narrow window of time during which producers could be encouraged, through investment which would reduce risk to the business, to plant more.

The [Landworkers' Alliance](#) are asking for grants of up to £10,000 to be made available for small scale producers. This equates to a pot of around £10m for England, if all producers growing on less than five hectares in England were to apply. In the absence of support from government they are currently calling on philanthropists to donate to a [solidarity pot](#) which would be directed to small scale producers to support them at this time.

National and long-term vision for a sustainable food and farming system

Building on the experience of the current crisis 19% mentioned the need for a coherent vision for a sustainable food and farming system going forward, both at a national and a

local level. Themes to be covered were wide ranging and some are captured by these quotations:

“Support has to come from a national level and be long-term. We need better education around seasonality, the carbon footprint of food production and importation at a basic level. Farms that are organic or are growing regeneratively need financial, marketing and administrative support, and there needs to be a wider conversation around producing food cheaply. But all of these issues tie in with wider issues around land management, rural poverty and living wages.”

“I can only hope that through this crisis a wider conversation is started and the communities we are part of make permanent choices to invest in their future health and the sustainable growing and food businesses local to them.”

Software and administrative support

15% of schemes mentioned an urgent need for administrative support and help with software for online ordering. Many expressed a need for current software to be improved. Ordering systems that were mentioned as being useful were [Bucky box](#), [Open Food Network \(OFN\)](#) and [Ooooby](#) – a webshop provider in Australia and New Zealand who is considering offering their services in the UK. With better online ordering systems schemes suggest they could supply more:

“...we need better software – we could take on another 20-30% of customers if we had better software for our customers to register/order and add weekly items; and to produce pick lists, customer accounts and labels for us to use. We would be happy to work with other box scheme operators to help develop a UK box scheme software package...”

As well as improved software there was an expressed need for mentoring and guidance on how to use these ordering systems as well as increased admin support. The Government of Ireland is investing in supporting the development of online ordering and e-commerce platforms as illustrated in their [Irish Food Board's COVID-19 response plan](#).

Linking up supply

9% of producers expressed the desire for more co-ordinated efforts to link up surplus supply in one area to suppliers in other areas. It was thought this would increase capacity to supply.

Planning permission and local authority support, farm specific social distancing guidance, training and apprenticeships and marketing

Producers (5%) mentioned planning permission issues related to onsite workers' accommodation and packing facilities as issues limiting ability to supply. Some producers suggested that local authorities could be doing more to free up spaces to be used as packing facilities. Clear farm specific guidance on “how to grow, pick, pack and deliver safely” in relation to COVID-19 was requested by 4% of schemes, and 3% mentioned the need for more training in horticulture. Finally, the need for a nationwide marketing campaign encouraging new customers to continue to support their box schemes was mentioned.

CONCLUSION

Fruit and veg, according to government health recommendations, should make up [40% of people's diets by weight](#). Despite this, fruit and veg producers, for nearly two decades, have received very little investment from government compared to other farming sectors. This at the same time as many of them have been also delivering environmental benefits through for example organic cultivation methods.

Now in a time of national crisis, fruit and veg producers running box schemes have answered the food needs of their communities and have been delivering over double their usual amount of fresh produce all over the country. The majority are taking steps to look after the medically and financially vulnerable as well as those isolating in their communities.

However, most have now reached capacity, have waiting lists and can take on no new customers. Given how financially stretched these schemes are already, loan systems are unlikely to lead to de-risking required for them to invest in increasing production and supply at this time.

Governments do provide funding to food producers in the UK and it seems appropriate that veg box schemes be invested in at this time and going forward in order for communities across the country to get increased access to healthy produce now and into the future as part of a sustainable food and farming system. In the meantime, new customers could consider supporting their box scheme long-term so they are there to supply fresh produce in local communities across the country in years to come.

This data was captured and analysed at pace and the report provides a snap-shot of the situation and issues in April 2020.