



The Food
Foundation

Kids Food Guarantee

The affordability and accessibility of fruit and veg

Main finding: Over 1 in 7 (14%) of the lowest priced fruit and veg products across the seven major retailers contains added salt and/or sugar, with low income families facing a number of barriers in accessing and affording their 5-a-day.

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Kid's Food Guarantee

The [Kid's Food Guarantee](#) is a set of actions which we think supermarkets should have in place as a minimum if we are to effectively tackle rising levels of food insecurity. These are actions that citizens have told us they are eager to see, and which align with existing areas of focus for food retailers.

What did we do?

To monitor this Guarantee area we worked with [Questionmark Foundation](#), an international non-profit think tank, to look at 1) the price of fruit and veg across UK retailers, and 2) assess how easily accessible the ten most competitively priced fruit and veg products for each of the seven retailers we assessed are. We looked at seven major UK retailers; Aldi, ASDA, Morrisons, Iceland, Sainsbury's, Tesco and Co-op. Price data was collected between the 21st – 25th November 2023. Additionally, The Food Foundation's Youth Ambassadors and staff ran random spot-checks in 30 stores between 5th – and 16th February 2024 to explore how readily available the lowest priced fruit and veg products identified are across the retailers in scope.

To capture price data we looked at the 70 lowest priced fruit and veg on a price per portion basis for each of the seven retailers. Fresh, frozen and tinned items were all included given that frozen and tinned fruit and veg can be more affordable than fresh and offer comparable [nutritional benefits](#). As there are no clear government guidelines on fruit and veg portion sizes for children, and because the [Kids Food Guarantee](#) looks at family or household shopping baskets, we used a standard 80g portion size to calculate price per portion. A final basket of ten low-cost fruit and veg portions was then selected for each retailer.

In line with [NHS guidelines](#) we limited the number of bean/pulse and fruit juice portions (up to 150ml) included in the final basket to a maximum of one each. Items with added salt and/or sugar were excluded, with each basket containing 6 types of veg and 4 types of fruit. We included a higher proportion of veg to fruit in the final baskets given that vegetables can be more widely used as a cooking ingredient. To ensure that a variety of types of fruit and veg were included, we stipulated that for fruits a maximum of one could be juice and one a tinned fruit. For the vegetables, a maximum of one could be beans/pulses, and a maximum of one could be a tinned vegetable to ensure dietary variety. For further information please see our [technical report](#).

Why fruit and veg?

There is universal consensus that fruit and veg is the cornerstone of healthier (and more planet friendly) diet. In the UK it is [recommended](#) that everyone eats at least five portions of fruit and veg a day (400g). Low levels of fruit and veg consumption have a direct impact on [disease outcomes](#). Yet consumption of fruit and veg is where the widest dietary inequalities are seen between high and low income households. Just [55%](#) of low income households meet the 5-a-day recommendation compared to 85% of the highest income households. The cost of living crisis is only exacerbating fruit and veg dietary inequality with growing evidence showing that everyone, but particularly low income households, are buying less fruit and veg as a result.

A [Food Foundation survey](#) of 6,051 adults in January 2024 found that 60% of households experiencing food insecurity reported buying less fruit and 44% less veg due to the cost of living crisis. Concerningly, purchases of vegetables dropped to their [lowest level in fifty years](#) in 2021-2022, suggesting that the cost of living crisis is having a profound impact on household purchasing habits and dietary health.

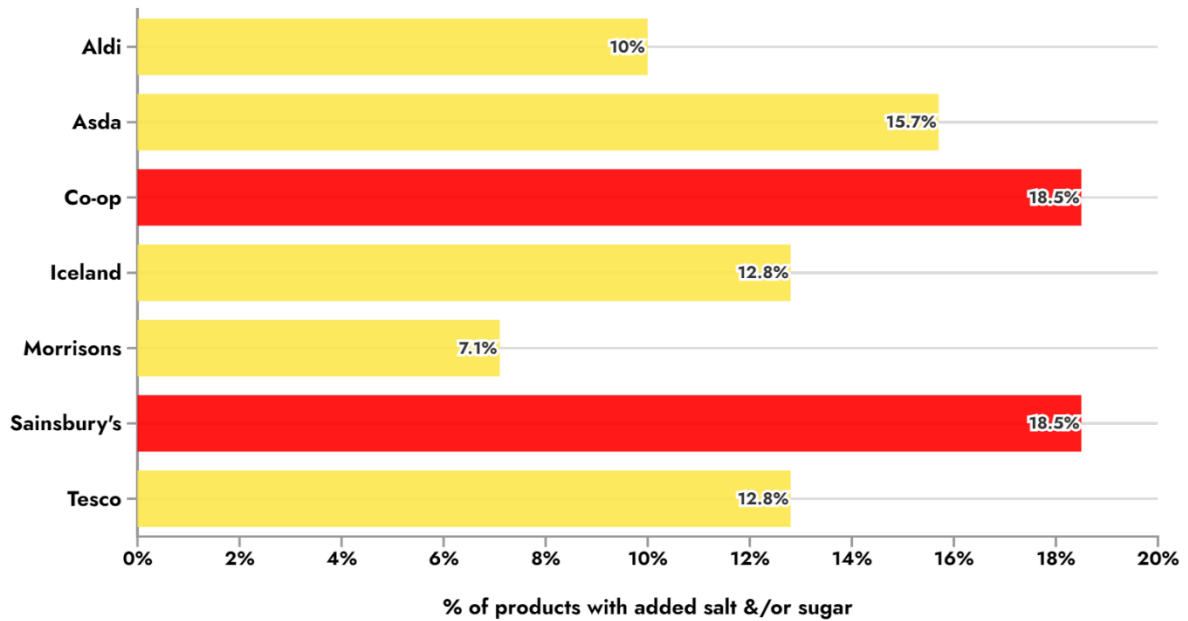
The Kids Food Guarantee therefore asks all retailers to ensure that at least a week's worth of 5 a day (>10 different products, fresh, frozen or tinned) are competitively priced and available at all stores.

The nutrition profile of the 70 lowest priced fruit and veg

We started by looking at the 70 lowest priced fruit and veg products for each retailer before selecting a basket of ten for each retailer in line with our criteria above. We found that of this larger selection, **more than 1 in 7 (14%) of the lowest priced fruit and veg products across the seven retailers we looked at contained added sugar and/or salt**. Vegetables were more likely to contain added salt or sugar than fruit products, with baked beans, tinned peas¹ and tomato sauces most likely to contain added salt and sugar. Morrisons had the smallest proportion of fruit and veg with added salt and/or sugar of the retailers (7.1%), and Sainsbury's and The Co-operative Group had the highest proportion, with almost a fifth of their lowest priced fruit and veg products containing salt and/or sugar (18.5%). This is concerning given that young children are [advised](#) to have only very limited amounts of salt and added sugar in their diets, with fruit and veg universally considered a healthy choice. Additionally, fruit and veg products with added salt and sugar are not within [scope](#) of the Healthy Start scheme, so low income families looking to buy as much fruit and veg as possible with their funds will be limited in their options.

¹ These are mushy peas and marrowfat peas which contain added salt as part of the preservation process. However, tinned peas in water are sold across the major supermarkets, and contain no added salt or sugar. It is sold at a higher price point to the more processed tinned pea products.

% of fruit & vegetable with added salt &/or sugar across retailers in scope



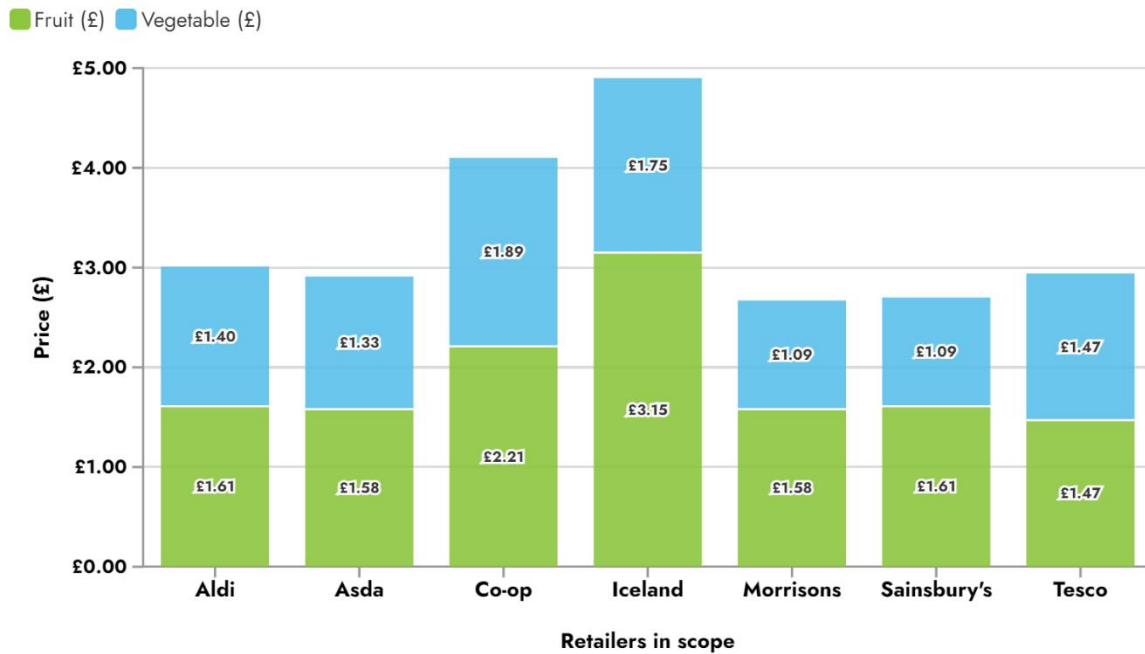
Data was collected between 21st- 25th November 2023.
 Products analysed across retailers in scope for 70 available lowest cost fruits and vegetables in total (35 fruits and 35 vegetables).



The lowest priced ten fruit and veg items for each retailer

Overall, looking at the final basket of ten items compiled for each retailer (the lowest priced portions of fruit and veg with no added salt and/or sugar), we can see that it is possible to buy a week's worth of fruit and veg (35 portions) for one person for less than £5 per person. Fruit is on average twice as expensive as vegetables, at 19p per portion compared to 10p per portion for veg.

Price of a week's worth of 5 A Day per individual

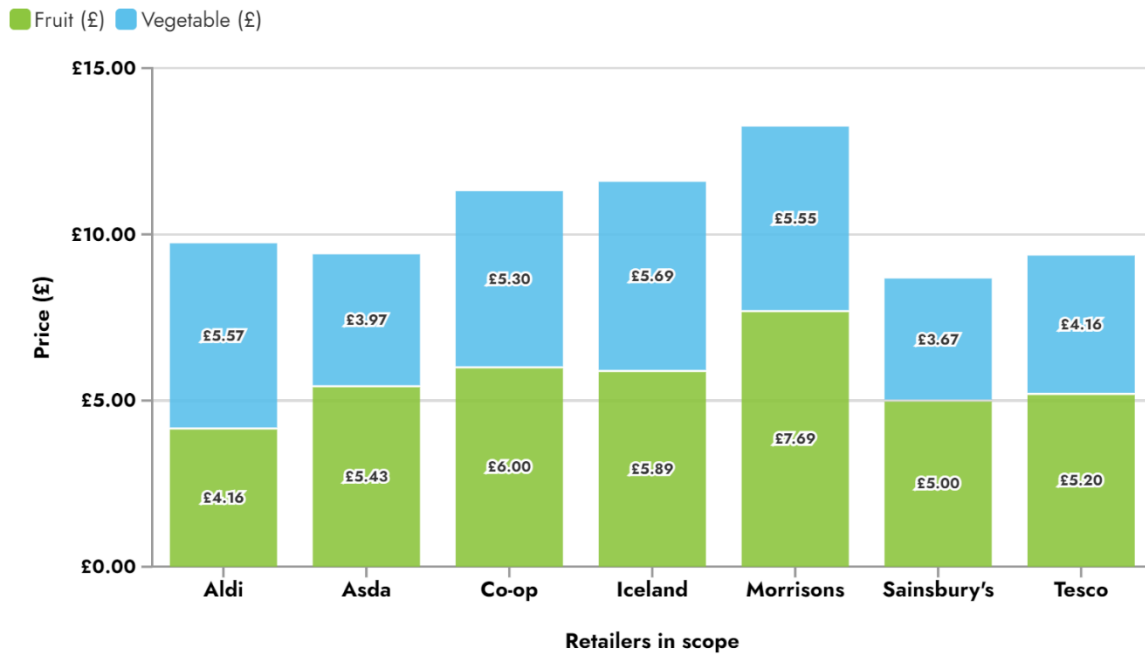


Data was collected between 21st- 25th November 2023.
Price has been calculated from average price per portion.



However, given that families will buy for their entire household and not for individuals, we also looked at the price of buying the ten low cost fruit and veg in each retailer's final basket as they are sold, to reflect that many types of fruit and veg are not usually bought on an individual portion basis but are purchased by the bag or tin. For example, you would buy a bunch of bananas or a tin of beans, both of which contain multiple portions of fruit and veg. When we look at the price of purchasing a week's worth of 5-a-day in the packages the lowest costed items are sold in, we can see that the price increases, ranging from £8.67 at Sainsbury's to £13.24 at Morrisons. At Morrisons it is possible to buy large packages of fruit and veg that are low cost on a per portion basis but cost more upfront.

Price of a basket with a week's worth of 5 A Day



Data was collected between 21st- 25th November 2023.
Price has been calculated from average price per portion.



Sainsbury's, Tesco, Aldi and ASDA offer families the best choice in terms of competitively priced fruit and veg, while Co-op, Iceland and Morrisons are a comparatively more expensive option for buying a week's worth of fruit and veg.

Across all the retailer baskets we looked at, it is possible to buy a week's worth of fruit and veg that as a minimum would cover at least one person's 5 a day for a week for less than £14. This is encouraging, but it is important to note that the average weekly expenditure on food per person for the poorest 10% of UK households is £25 per week, compared to £50 for the wealthiest 10% of households.² This means that even if poorer families were buying the lowest priced fruit and veg available, it would cost between 34-52% of one person's weekly food budget to afford a week's worth of 5-a-day. This compares to 17-26% for the wealthiest 10% of families.

² Source: DEFRA's Family Food Survey, 2021/2

How easily accessible are the lowest priced fruit and veg at each retailer?

We visited 30 stores across London, Halifax, Kent, Malvern and Bath to see how widely available the ten lowest cost fruit and veg items for each retailer are. Stores were chosen based on their proximity to the Food Foundation's youth ambassador and staff's local areas, with a mix of different store sizes visited (standard, super stores and local/express formats). Six of the seven retailers in scope were visited (no data was able to be captured for Aldi).

We found that just one store – a Tesco Superstore - had all ten of the fruit and veg products available. The majority of the stores (60%) had 5 or less of the items identified in stock. On average stores had 5 items available, although this was lower in the local/express stores visited, where an average of 4 low-cost fruit and veg products were available. While these results are not representative at a national level, they are nevertheless indicative of the fact that affordable and healthy options are not always widely available or easily accessible, particularly for those who are reliant on local, convenience stores.

The type and source of fruit and veg available across retailers

For the final basket of ten items compiled for each retailer, bananas (loose and packed) appeared most frequently within the lowest priced fruits identified. Carrots, root vegetables and brassicas (cabbage and sprouts) were the types of vegetables most likely to appear in the final basket of ten items.

Where data was available, we looked at the origin of these low priced fruit and veg to see where they had been grown. In the UK, 35% of the [total supply](#) of fruit and vegetables is grown in the UK, with imports making up the other 65%. Across all seven retailers only a third (32%) of products had origin information listed online, with Sainsbury's providing the most information, and no origin information found for any of the Iceland fruit and veg products reviewed. Overall, 8.8% of products were from the UK, 20% were imported and the remainder had no origin information.

Growing and sourcing more UK fruit and vegetables would support British farming, and help improve the UK's [food security](#), given that over a third of our imported fruit and veg comes from countries at high risk of climate change, with half coming from countries at high risk of water scarcity.

The affordability/cost conundrum

While many low income families struggle to afford sufficient amounts of fruit and veg, it is also true to say that many [British fruit and vegetable growers struggle](#) to bring in an adequate income. For many British farmers, growing fruit and veg is no longer profitable. A recent [survey](#) reported that almost half (49%) of British fruit and veg farmers fear they will go out of business within the next 12 months. There are several reasons driving this state of affairs; including labour shortages, the [cost of production having increased](#) by as much as 39% in the past two years, a lack of government support for the sector, and long-term contracts with retailers locking growers into contracts that have not kept pace with inflationary pressures. Any solutions to tackling the affordability issues faced by low income families should therefore not focus exclusively on lowering price if those cost reductions will simply be pushed back onto growers.

Recommendations

This report has found that while all the retailers offer competitively priced fruit and veg, low income customers in particular may still struggle to afford enough fruit and veg, particularly when feeding families. Additionally, the very lowest priced products do not appear to be that readily available in physical stores, and often contain added salt and/or sugar.

Retailers ought to:

- Ensure that a range of budget fruit and veg products are available across all their stores, including convenience store formats
- Work to ensure there is a shift away from products with added sugar and/or salt in tinned fruit and veg products
- Support and promote the Healthy Start scheme to ensure that low income customers are able to access fruit and vegetables. For more details on our asks of retailers regarding Healthy Start read our latest Kids Food Guarantee [formula report](#).
- Explore the potential to run volume promotions on UK-grown fruit and veg when in season. This would ensure that citizens can benefit from seasonal gluts of fruit and veg without seeing farmer margins further eroded, as produce tends to be more affordable when in season. This would also help reduce farm food waste. This is something citizens often say they would like to see, with 80% of adults saying that they would like [supermarkets to do more](#) to promote seasonal veg.
- Review the often very stringent specifications for fruit and veg sometimes specified by retailers in their contracts with growers, so that more imperfect produce can be sold to citizens. This would need to be at prices which reflect the cost of production – currently farmers are expected to sell 'wonky veg' for less. This will be increasingly important as climate change makes flooding and drought more common, helping to share more of the risk with growers when crops are affected.
- Review the fixed price contract system. The UK operates on a fixed price system, unlike Europe which operates via supply and demand. This means growers receive a pre-agreed amount for their produce for the duration of their contracts. A supply and demand model with contracts that better reflect inflation and seasonality would help to support UK growers to continue to invest in production. Alongside this, retailers should build long term relationships with farmers, make good on their agreements to buy crops, and pay on time.

In line with our [Manifesto asks](#), the government ought to:

- Require the cost of healthy and sustainable diets to be taken into account when setting benefit levels and the national living wage.
- Expand eligibility, improve uptake and increase the value of Healthy Start (in England, Northern Ireland and Wales) and Best Start Foods (in Scotland), and make the extension of Healthy Start to children with no recourse to public funds permanent.
- Commit to an ambitious horticulture growth plan for British farmers in each of the devolved nations for an expanded, vibrant, and thriving horticulture sector which can support the production and increased consumption of fruit, vegetables and legumes, and ensure the UK is not unsustainably reliant on imports.

- [Support calls](#) to reform the Groceries Supply Code of Practice (GSCOP) to redistribute risks more equitably along the supply chain and better protect and support farmers.



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