

FARMING FOR 5-A-DAY:

**how resilient is the UK's
supply of fruit, veg and beans
in a changing climate?**



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ABOUT THE FOOD FOUNDATION



The Food Foundation is an independent charity working to address challenges in the food system in the interests of the UK public. Working at the interface between academia and policymakers (parliamentarians, civil servants, local authorities, business leaders and investors) we use a wide range of approaches to make change happen including events, publications, media stories, social media campaigns and multistakeholder partnerships. We also work directly with citizens to ensure their lived experience is reflected in our policy proposals. We work with many partners on a range of different thematic areas, working closely with academics to generate evidence and campaigners who can drive change. We are independent of all political parties and business, and we are not limited by a single issue or special interest.

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Executive Summary

KEY FINDINGS AND RECOMMENDATIONS

- › The UK has a major economic opportunity to expand the horticulture sector, which could add billions to the economy, create over 20,000 jobs, and add 3% to farm profits across the country, bringing benefits to farmer livelihoods, local economies and public health (Green Alliance, 2025). With the right support, the UK could grow more of the fruit, veg and beans that citizens buy and consume, and import less.
- › There is significant support among MPs, businesses and the public for the UK to grow more of its food. In 2025, 86% of MPs agreed that the UK should grow more fruit, vegetables and beans to support food security (The Food Foundation, 2025d). In 2026, 73% of the public supported a legally binding target to increase both domestic fruit and vegetable production and average fruit and vegetable consumption among children (The Food Foundation, 2026f). Meanwhile, 92% of businesses surveyed in 2026 supported a fruit and vegetable target (The Food Foundation, 2026g).
- › Currently, self-sufficiency of the most purchased types of fruit, veg and beans in the UK is low, meaning we currently grow only a small proportion of the fruit, veg and beans that we eat most of.
- › The UK imports 80% of its fruit and 47% of its veg (Defra, 2025a), particularly from countries that are vulnerable to climate change and water scarcity – around 18% of the UK's fruit and veg come from nations at high and moderate risk to climate change (CCC, 2026). This poses a real threat to our food and nutrition security.
- › Many households in the UK are already experiencing food insecurity (including one in six households with children), with evidence that during food price spikes, people tend to cut down on purchases of healthy food like fruit and veg, causing detrimental effects to health (The Food Foundation, 2026a).
- › The climate and nature crisis will worsen an already critical situation, with restricted supplies in the face of extreme weather impacting on harvests, yields and supply chains and likely to lead to shortages and higher prices for imported fruit, veg and beans.
- › The Government should ensure that the UK has a Horticulture Sector Growth Plan fit for the future. This should include an action plan for boosting domestic production and consumption of fruit, veg & beans, ensure affordable access to healthy, sustainable food with fair prices for British farmers. It should also bring new focus to strengthening local supply chains and boosting resilience.

THIS BRIEFING

This briefing aims to explore the prospects for the supply of fruit, vegetables, beans and pulses (i.e., beans, lentils, chickpeas and other legumes) in the UK in a changing climate. It identifies where there are opportunities for the UK to increase production and shore up food and nutrition security, as well as looking at the current vulnerability of the UK's supply. These foods are core components of a healthy and sustainable diet and should be a priority for the Government. Based on the findings, it recommends a series of actions for policymakers to ensure UK citizens have a future supply of these staple healthy foods.



WHAT WE DID

The analysis in this briefing focuses on the top 20 most purchased fruit and veg, according to Fresh Produce Journal's Big 50 Products, 2023. This list identifies and ranks the 50 best-selling fresh fruit and vegetable products over the previous year in UK supermarkets.

To calculate UK self-sufficiency of these 20 products, we used import and export data from Defra's Horticultural Statistics 2024, which provides annual statistics on the area, yield, production, trade and valuation of fruit and vegetable crops grown in the UK.

We also look at climate vulnerability of the countries the UK imports fruit and vegetables from. The figures are based on import data kindly provided by the Energy and Climate Intelligence Unit (ECIU), which uses 2025 data from UK Trade Info from HM Revenue and Customs, available [here](#). It uses the vulnerabilities sub-index of the **Notre Dame Global Adaptation Initiative (ND-GAIN)**. It also includes data from the ND-GAIN readiness index, measuring economic, governance and social readiness.



The opportunity

There is wide support for the UK to grow more of its fruit, veg and beans

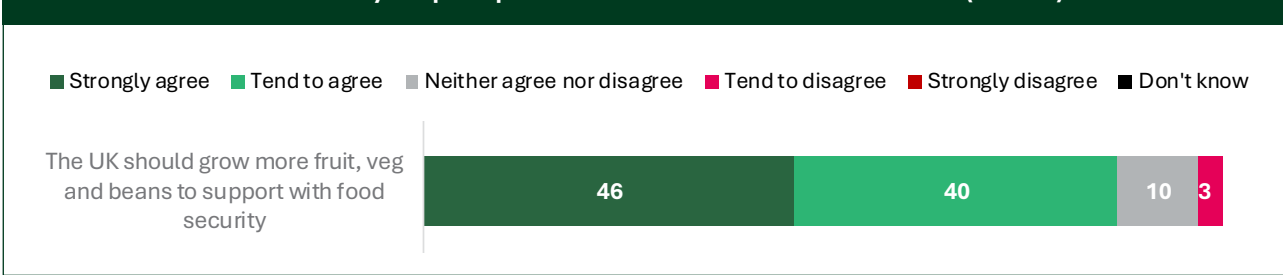
In representative polling undertaken in December 2025 by Ipsos UK, 86% of MPs agreed the UK should grow more fruit, veg and beans for food security (The Food Foundation, 2025d). The MP polling also noted a need for Government to play a more supportive role in shaping citizens' diets by incentivising plant-rich dietary choices by supporting the production of and access to plant-based food.

Strong levels of support for government action on this are mirrored among the public. Nationally representative polling in 2026 found that 73% would support a legally binding target to increase the amount of fruit and vegetables produced in the UK and average consumption of fruit and vegetables among children (The Food Foundation, 2026f). These findings are supported by a YouGov survey which found that 70%

of UK citizens want the Government to help them hit their five-a-day target by subsidising UK farmers to boost production of fruit, veg, beans and pulses and making it easier for citizens to access them (Madre Brava, 2026).

Businesses also support this. Of a survey of 82 representatives from food businesses, 92% of them were also supportive of a fruit and veg target. As well as there being strong overall support for a fruit and veg target amongst UK businesses, out of a list of suggested policies, they ranked support for British farmers to grow more fruit, veg and beans, and subsidised fruit and veg costs, as being the most effective interventions for improving access to affordable healthy diets. 82% of businesses thought support for British farmers was an extremely or very effective policy intervention (The Food Foundation 2026g).

FIGURE 1: % of UK MPs surveyed Ipsos poll on behalf of The Food Foundation (2025d)



A Horticulture Sector Growth Plan and the wider UK food policy landscape

Horticulture has been selected as one of the priority sectors for the Government's Sector Growth Plans, and a new Farming and Food Partnership Board will provide a key space for collaboration, with innovation and R&D, productivity, profitability and food security as core priorities.

Defra's Farming Roadmap 2050, published in July 2026, has recognised that food and farming is part of the UK's critical national infrastructure, and that climate change, geopolitical instability and volatile global markets increase the importance of domestic production and improved resilience of the UK's food supply. Meanwhile, the Climate Change Committee's

Fourth Independent Assessment of UK Climate Risk (2026) proposed the Government should set a target on ensuring nutrition security in the UK - recommending from now through to 2050, there should be no climate-related food shortages across entire nutritionally important groups in the UK (CCC, 2026).

Other current Government plans aiming to address food system issues include a Food Strategy and a Land Use Framework. Together, these plans have the potential to provide long-term direction and policy certainty and align competing objectives across government around food production, land management, public health and the environment. The Government also

pledged to ensure that 50% of all food procured across the public sector (schools, hospitals and prisons) is produced locally (or certified to higher environmental standards), an initiative which, among other aims, seeks to boost British farming.

There is a new iteration of the Sustainable Farming Incentive (SFI) offer for 2026, to support farmers to manage their land in ways that deliver environmental benefits as they produce food (Defra 2026b). Although these schemes support public goods, the 3-hectare threshold leaves out many small-scale, high-value market gardens growing fruit and veg for local communities.

The UK's vulnerable nutrition security

The increasing focus on food system resilience is as welcome as it is urgent

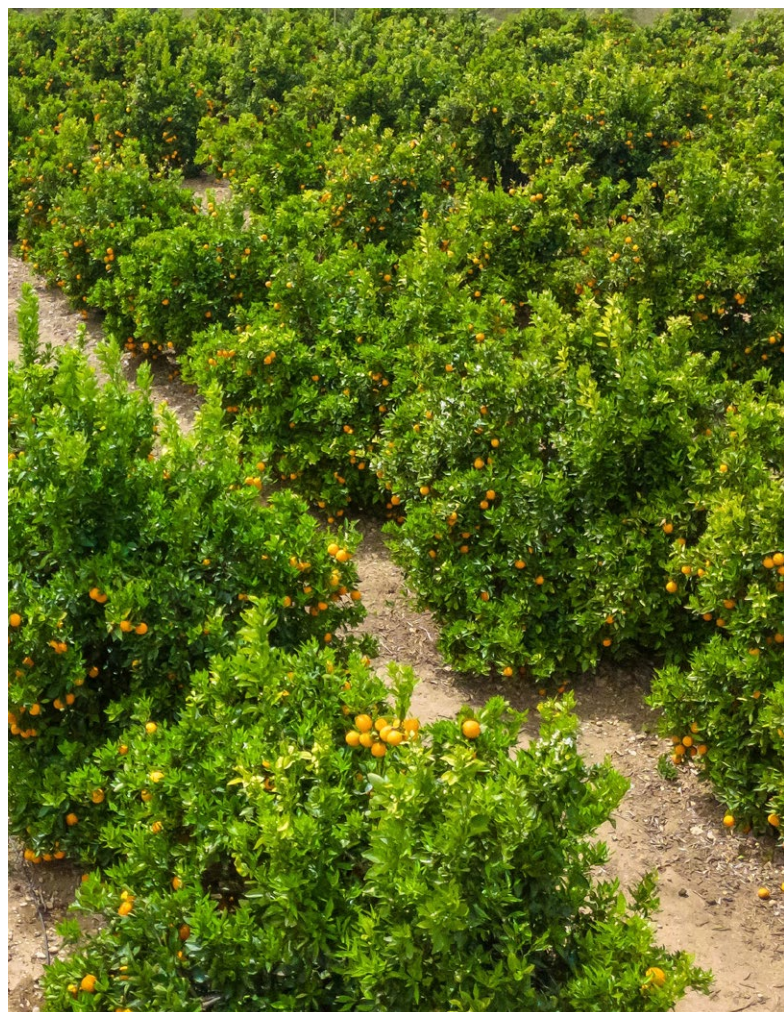
There are growing concerns about food security globally, particularly in light of rising geopolitical instability and repeated food price shocks in recent years, all exacerbated by the worsening climate and nature crisis. Recent reports note the high likelihood of global ecosystem degradation that will lower crop yields, cause crop failures, reduce arable land, cause water insecurity and fisheries to collapse (HM Government, 2026; IFoA, 2026). This is predicted to lead to food shortages and price rises.

The UK is particularly vulnerable to food price shocks, given that it imports a high proportion of its food from overseas. Although predominantly self-sufficient in its production of grains, meat, milk and eggs, the UK imports 40% of all its food (Defra, 2024). The UK has: one of the lowest food self-sufficiency ratios among large Western European countries; significantly higher import dependence than France, Germany or Spain; one of the highest reliance rates on imported fruit in Europe (FAO, 2026).

Of particular concern is that the UK currently imports 80% of its fruit and 47% of its veg (Defra, 2025a) and around 18% of its fruit and veg comes from nations at high and moderate risk to climate change (CCC, 2026). A quarter of the UK's food imports come from the Mediterranean, where many crop yields are impacted by floods, droughts and heatwaves, and at least half of the UK's imported fruit and veg come from countries facing extreme water scarcity (Green Alliance, 2026; Defra, 2024).

Moreover, there is currently a mismatch between UK domestic food production and dietary goals (Figure 2), with fruit and vegetables showing the biggest deficit between what the Government recommends we should be consuming for a healthy diet (41%) versus percentage of the food groups we produce domestically (7%).

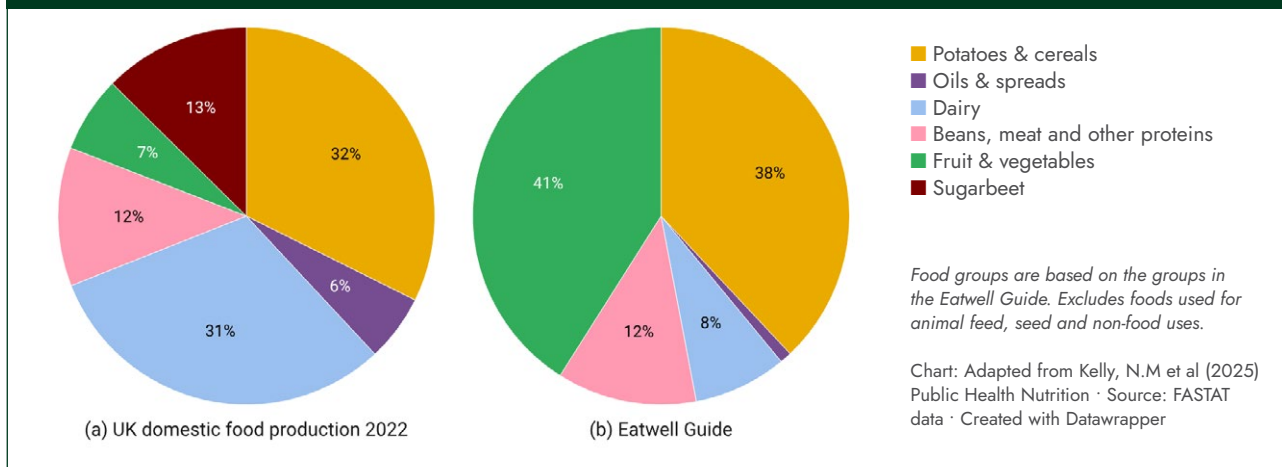
The UK's dependence on climate-vulnerable food-producing countries is projected to increase in the future, and the Climate Change Committee (CCC) expect this to lead to potential shortfalls in supply and difficulties with ensuring a stable supply of foods that are consistent with Government dietary



recommendations, including fruits, vegetables and legumes. Recent modelling found 52% of legumes and 47% of fruit would be imported from climate-vulnerable countries by 2050 (CCC, 2026).

As well as recommending the government considers large-scale national food stockpiling to avoid risks of shortages across nutritionally important food groups, the CCC has advised the Government to promote more UK production where appropriate and consider climate resilience and externalities related to food imports in all trade activities (CCC, 2026). As such, the UK's domestic horticulture sector should be a priority for investment and policy support to boost food security.

FIGURE 2: The mismatch between dietary guidelines and UK domestic food production: 41% of our diets should come from fruit and veg yet these foods currently make up only 7% of our domestic production (by volume). 2025. <https://doi.org/10.6084/m9.figshare.32024286>; [10.1017/S1368980025100633](https://doi.org/10.1017/S1368980025100633)



Food prices remain high, with climate change likely to worsen an already critical issue

Food prices in the UK have undergone unprecedented rises in recent years, and by the end of 2026 food prices could be 50% higher than they were in 2021. This means that over the last four and a half years prices will have increased at a rate that has previously taken over 19 years to reach (ECIU, 2026). There is still uncertainty around exactly how much prices will rise, however, because it's not clear how long the disruption to supply chains caused by the conflict in the Middle East will last.

Many people already experience food insecurity in the UK – one in six (16.7%) households with children reported experiencing food insecurity in June of this year, nearly nine million adults and children (The Food Foundation, 2026a). That's compared to 14.9% of households with children at the same time last year – the situation for many families is getting worse, and further price rises driven by climate change will be hard for many households to bear. Indeed, a healthy diet has already become unachievable for millions of UK families: 64.5% of food-insecure households reported cutting back on fruit and 55% on veg this year and the lowest income households with children would have to spend a staggering 85% of their disposable income to afford the Government recommended healthy diet, up from 70% in 2024 (The Food Foundation, 2026a; The Food Foundation, 2026e).

Unequal access to healthy food is a major driver of health inequalities in the UK – the Government's latest Food Security Report stated that the poorest 10% of the country eat 42% fewer fruit and veg than is recommended, while the richest eat 13% less (Defra, 2024). Consumption

levels are also heavily determined by access and availability, for example there is a stark urban-rural divide – research found that over half of survey respondents living in rural areas had no access to a fruit and vegetable shop within a 20-minute walk (Blake, 2026).

These inequalities are substantiated by the stark decline of the nation's health in recent decades. Healthy life expectancy has fallen by two years in the past decade, with obesity named as a key factor (Health Foundation, 2026; Nesta 2024). It also has material economic costs for the UK economy; diet-related ill health already costs the economy £126 billion a year (Nesta, 2025).

Farming constraints

At the other end of the supply chain, UK farmers are also struggling under mounting costs and decreasing profits, with half (51%) considering leaving the industry last year due to financial pressures (McCain, 2025). The UK's horticulture sector has declined in recent years, with a 13% reduction in domestic vegetable production between 2021 and 2023 (Defra, 2024). Constraints around access to labour, planning, water and rising energy and fertiliser costs are among the critical barriers to the growth of the sector. Compared to other forms of agriculture, the horticulture sector depends heavily on energy to produce crops grown in heated glasshouses which supply much of the UK's high value fresh fruit and veg – about 21% of UK vegetable production value (Defra, 2025b). However, Controlled Environment Horticulture (primarily greenhouses and vertical farming) is not currently eligible for the electricity price discounts available to many energy-intensive industries. With energy and fertiliser prices currently rising rapidly (a 30–40% rise in prices for some fertilisers, as of April 2026) due to the current geopolitical unrest, many growers face the prospect of spiralling costs (Defra, 2026a).

BEANS

Beans and pulses (beans, lentils, chickpeas and other legumes) are another food that counts towards the recommended 5-a-day and are full of fibre and protein. They are also affordable; however, access, availability, and appeal, are often bigger barriers to uptake than cost. Consumption in the UK is low – with two thirds of the population eating less than one portion a week, despite the fact that up to 9,000 premature deaths in the UK are associated with diets low in legumes every year (The Food Foundation, 2025b).

Beans are a good example of a vegetable that the UK can grow well, and yet the beans we produce are not the beans that people are familiar with. The UK grows about 800,000 tonnes of beans annually, but most of these are exported or used as animal feed (Defra, 2024). Conversely, we import 500,000 tonnes of beans each year, leading to a bean trade deficit worth a potential £586 million annually to UK producers (The Food Foundation, 2025b). Creating consumer demand for British grown beans, pulses and other legumes (particularly Faba beans, Yellow split peas, Marrowfat peas and Carlin peas) needs support from those shaping food trends (such as chefs and influencers) as well as action from downstream food businesses (such as public food procurers, caterers and retailers). This could help to increase the availability and appeal of these beans and would unlock significant opportunities for UK farmers if realised.



How self-sufficient is the UK in fruit and veg?

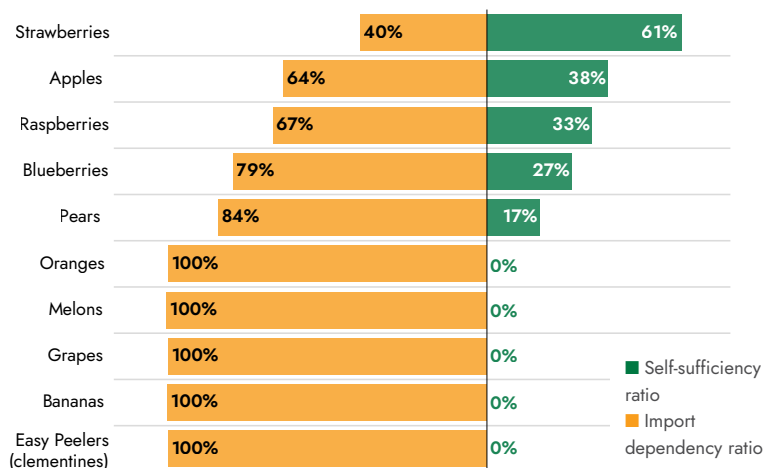
We used Defra production, import and export data to determine levels of self-sufficiency and import dependency for each of the UK's top 20 most purchased fruit and veg, as shown in Figures 3 and 4. Self-sufficiency is here defined as the proportion of each product that we grow in the UK. For example, all our bananas, and 84% of our pears are grown outside the UK. The graphs show that the UK is far more reliant on imports of our favourite fruit than our favourite veg.

Of our nine most purchased fruits, we grow only five (apples, strawberries, blueberries, raspberries, pears) – and four of those are under 40% self-sufficient. We grow almost all our top vegetables, but only carrots reach high self-sufficiency (94%); the rest are all below 50%.

Could we grow more of these fruit and veg with the right support?

There are some crops for which imports are needed for our whole supply, such as citrus fruits and bananas, but others – tomatoes, mushrooms, peppers, cucumbers, onions, broccoli, and green beans – can be grown in the UK, but are currently mostly imported from European countries. A good number of these crops are grown under cover (e.g., glasshouses) and so can often be produced most months of the year (and are more resilient to climate shocks). Therefore, these crops should be a focus of government policy, as we could grow more of these with the right support in place. For example, currently the UK is only 16% self-sufficient in tomatoes, however they are currently being imported from The Netherlands and Ireland, both

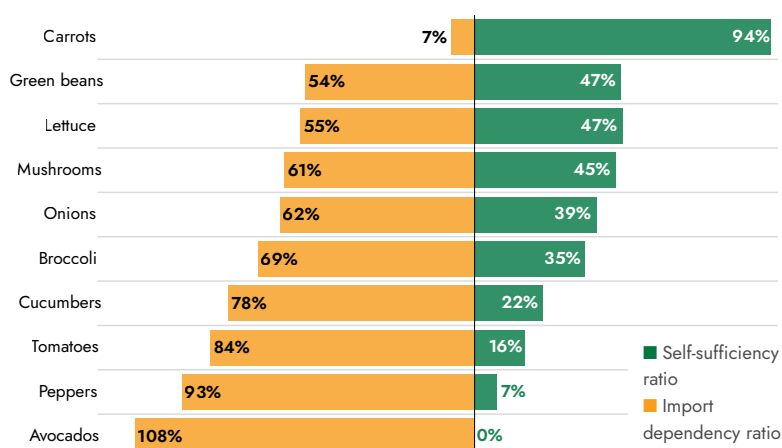
FIGURE 3: UK self-sufficiency and import dependency for our most purchased fruits



Source: Horticultural Statistics 2024, Defra and FAOSTAT

Self-Sufficiency Ratios (SSR) and Import Dependency Ratios (IDR) do not sum to 100% because the IDR denominator excludes exports, whereas the SSR numerator does not. As a result, the two indicators measure different aspects of food supply and should not be interpreted as complementary percentages that add to 100%.

FIGURE 4: UK self-sufficiency and import dependency for our most purchased veg



Source: Horticultural Statistics 2024, Defra

Self-Sufficiency Ratios (SSR) and Import Dependency Ratios (IDR) do not sum to 100% because the IDR denominator excludes exports, whereas the SSR numerator does not. As a result, the two indicators measure different aspects of food supply and should not be interpreted as complementary percentages that add to 100%. Avocados have an IDR of 108% because the UK has no domestic production, relies heavily on imports, and also re-exports a significant proportion of imported

avocados. As exports reduce domestic supply but not imports in the IDR calculation, values can exceed 100%.
 - Broccoli: Import and export data includes cauliflower and broccoli, does not disaggregate.
 - Carrot: Import and export data includes carrot and turnip, does not disaggregate.
 - Potatoes have been excluded as they are not categorised as a vegetable.

of which have a similar temperate maritime climate to the UK. Similarly, the UK is 61% import dependent for mushrooms, mostly exported by Ireland and Poland, however they are mostly grown indoors so there is potential to grow more of them domestically.

It is worth noting that even for the fruit and veg where the UK has higher levels of self-sufficiency,

increasing the amounts grown domestically could still generate considerable opportunities for British farmers (e.g. moving from 38% to 50+% self-sufficiency in apple production). Green Alliance estimates that increasing UK self-sufficiency in fruit and veg growing by 10% could add £3.3 billion to the economy (Green Alliance, 2025), bringing benefits to farmer livelihoods and local economies.

LESSONS FROM THE NETHERLANDS: A LEADER IN HORTICULTURE



The Netherlands is an example of a country which places strong emphasis on national food security, and 'does more with less' considering it is relatively small (the UK has over 6 times its land mass). It is a global leader in horticulture, producing 3.5 billion euros worth of fruit and veg (Dutch Horticulture.NL, 2026), partly produced in over 9,000 hectares of glasshouses.

The Netherlands has a very similar temperate maritime climate to the UK, with mild winters, cool summers, and rain throughout the year. Its extensive use of glasshouses which are more resilient to weather extremes enables production of tomatoes, aubergines, peppers and cucumbers nearly all year round.

Lessons for the UK:

A combination of policy commitments over several decades has enabled The Netherlands to become leaders in horticulture, with the Dutch Government treating it as a strategic economic sector and supporting it through a raft of policies, including long-term investment, innovation, infrastructure, and industry coordination. Specific lessons can be taken for UK policymakers, including:

- Providing long term policy certainty and an overarching national strategy for growth.
- Infrastructure planning and energy transition support to enable controlled environment horticulture year-round, providing high-value production and reduced vulnerability to weather conditions.
- Sustained investment in R&D and innovation.
- Support for Producer Organisations and cooperatives to reduce fragmentation and improve competitiveness.
- Investment in agricultural colleges and technical training.

OPPORTUNITIES FOR GROWTH IN THE CONVENIENCE SECTOR

According to analysis by IGD, one of the biggest growth areas for convenience stores in 2025 was fresh fruit and veg, with impressive sales growth of 11.2%. There are further opportunities to increase the availability of fruit and veg in the convenience sector and thus drive-up sales. Fruit and veg make up just 3.7% of convenience store sales, showing significant headroom for growth (IGD, 2025a).



How might climate change affect the fruit and veg we import?

Climate change: a threat to both supply and price

The impact of the climate and nature crisis on food production is worsening around the world. The IPCC forecast that 10% of current crop and livestock area will become unsuitable by 2050, and over 30% by 2100 under a high emissions scenario (IPCC, 2022). It also expects higher temperatures to lead to yield losses, heat stress, and quality drops in global fruits, vegetables, and annual crops (IPCC, 2026). Declines in fruit and veg yields and crop suitability are especially projected in tropical and semi-tropical regions, with the Mediterranean, North Africa, South and Central America key global regions with high vulnerability. For vegetables, studies have indicated that warming is likely to result in much higher yield declines for those grown in higher baseline temperatures ($>20^{\circ}\text{C}$), than those in cooler environments currently ($\leq 20^{\circ}\text{C}$) – 31.5% yield decline under 4°C warming, compared to 5% (IPCC, 2026).

A large proportion (64%) of fruit and veg imported to the UK comes from just 10 countries and the diversity of regions from where we import fresh produce has reduced in recent years, with greater concentration of supply from climate-vulnerable regions (CCC, 2026). This poses a major risk to food security and resilience. For example, water scarcity threatens major growing regions and is already affecting global food supply. In 2024, floods in the

UK and France decreased wheat production and high temperatures in Eastern Europe disrupted maize crops (Foresight Transitions, 2025). Disastrous floods in Valencia in the same year destroyed thousands of hectares of fruit and vegetable crops, wiping out harvests of fruit (up to 60% losses of oranges, mandarins, and lemons in some areas) and vegetables (particularly tomatoes and peppers) (EuroNews, 2024).

Farms are experiencing more frequent and severe droughts, heatwaves, and floods, with warmer temperatures also driving a rise in pest and disease outbreaks, and an increase in lost harvests (Green Alliance, 2026). Domestic shortages of tomatoes, peppers and other fresh salad in 2023 were widely attributed to drought and heat in North Africa and southern Europe (ECIU, 2023a), demonstrating the UK's reliance on external countries experiencing more extreme impacts of climate change. Already this year UK supermarkets have seen shortages of strawberries, raspberries, avocados and peppers (Green Alliance, 2026).

Moreover, in addition to posing a risk to supply, higher temperatures and extreme weather events are expected to increase food prices for those crops where yields and supplies are threatened, affecting consumers already burdened with a growing cost-

of-living crisis. **Climate change is already affecting staple food items; in 2024, coffee prices reached multi-year highs, with Arabica up 58% and Robusta up 70%** in some periods (FAO, 2025). Similarly cocoa prices rose 136% between July 2022 and February 2024 (UNCTAD, 2024) and in January 2024 the price of olive oil in the EU was 50% higher than in January 2023 (Eurostat, 2024). It's likely that healthy staples like fruit, veg and legumes will start to be affected as climate change worsens.



Our analysis

Our analysis shows that the UK imported the highest volumes of its top 20 most purchased fruit and veg from **Spain, the Netherlands, Colombia, Morocco and South Africa** in 2025, as shown in Figures 5 and 6.

Spain was the top exporter by some way, with the next highest exporters providing less than half of what Spain provides (excluding the Netherlands¹). Figure 6 shows that the fruits that the UK imported from Spain in highest volumes were oranges, grapes, clementines, melon, and for veg the highest volumes were broccoli, onions, tomatoes, peppers and cucumbers.

Figure 7 shows the top 20 countries the UK imported from in 2025, their climate vulnerability, as well as their ability to adapt to climate change, with the bubble size representing volume of imports in tonnes.

Of the top 20 countries the UK imports from most, 18 (90%) are moderately to severely vulnerable – 17 are ‘moderately’ vulnerable to climate change and 1 high to severely vulnerable (Kenya). The remaining 2 are low vulnerability, but at the high end of the scale (Spain and Germany).

Over half of the top 20 (11) are non-European countries, all with moderate climate vulnerability and 7 (35%) of these countries have an ND-GAIN score below 50, which suggests they are, on balance, more vulnerable to climate impacts than they are ready to adapt to them.

Nine are European countries, and although they all have better ND-GAIN scores, only two have

low levels of vulnerability - the rest have moderate levels. This is concerning, particularly because Europe is the fastest warming continent (European Environment Agency, 2026).

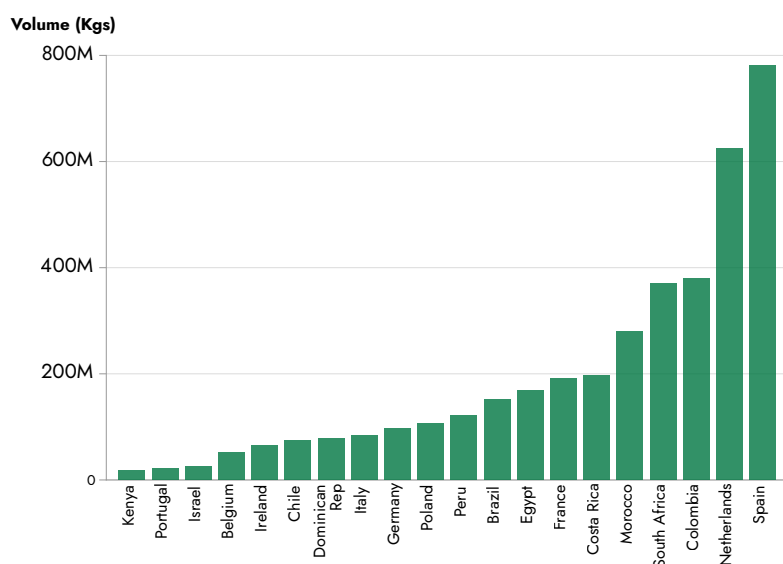
These assessments show that the UK is relying on countries which are much more vulnerable to climate change, including water scarcity, for most of its favourite healthy staple foods. This makes the UK’s food supply more vulnerable to shortages and price rises now and into the future. The UK itself has a lower vulnerability and a high ND-GAIN score of 68.6, meaning its readiness to adapt is higher than its climate vulnerability (ND-GAIN, 2024).

The UK is also relying on particularly climate vulnerable countries to produce fruit, veg and beans we can grow here; for example, green beans were

imported in highest volumes from Morocco, Egypt and Kenya in 2025 – this is putting pressure on countries with water scarcity issues whilst exposing the UK’s food and nutrition security. Moreover, the IPCC projects 30–60% of common bean growing areas in Africa could become unsuitable by the end of the century under high-emissions scenarios (IPCC, 2026).

Even with some of the fruit and veg which can’t be grown in the UK, such as bananas, the UK is relying on just a few climate vulnerable countries for most of its supply. Currently over half of the bananas imported into the UK come from just two countries in Latin America: Colombia and Costa Rica (OEC, 2026), both of which have moderate levels of climate vulnerability, and Colombia has an ND-GAIN score below 50, meaning its readiness to adapt is lower than its vulnerability.

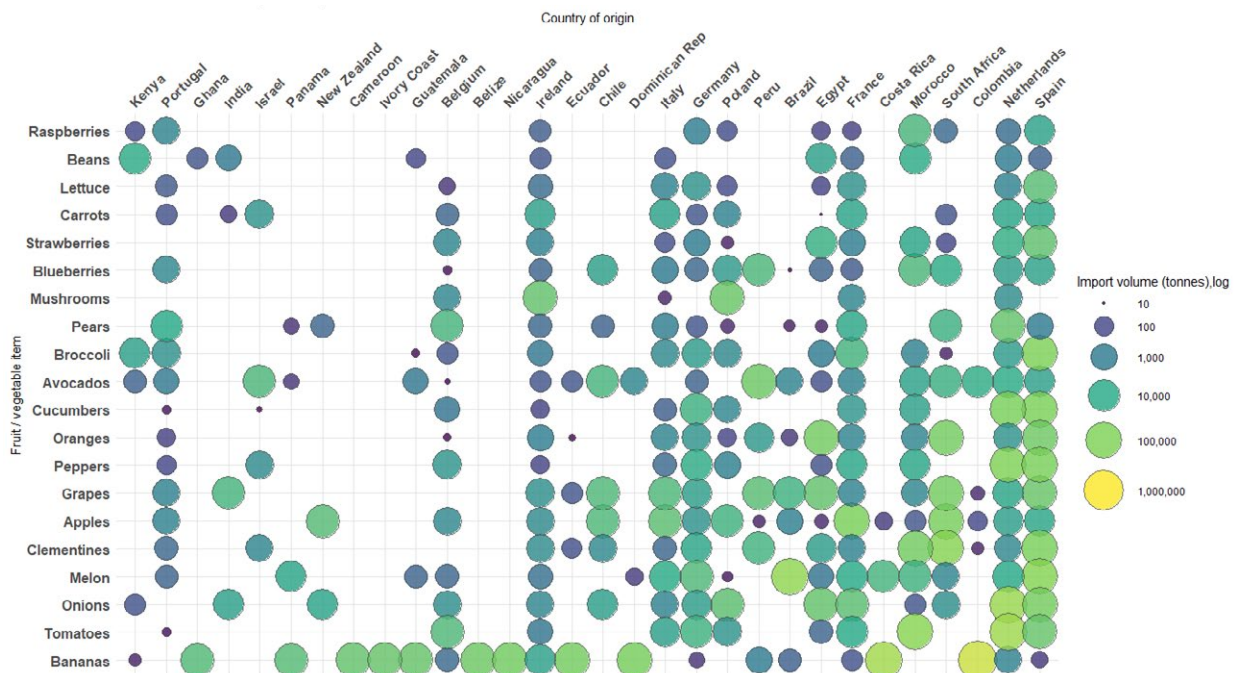
FIGURE 5: Top 20 countries the UK imported its top 20 most purchased fruit, veg and beans from in 2025, by volume (kilograms)



Source: Data provided by ECIU from UK Trade Info from HM Revenue and Customs, 2025.

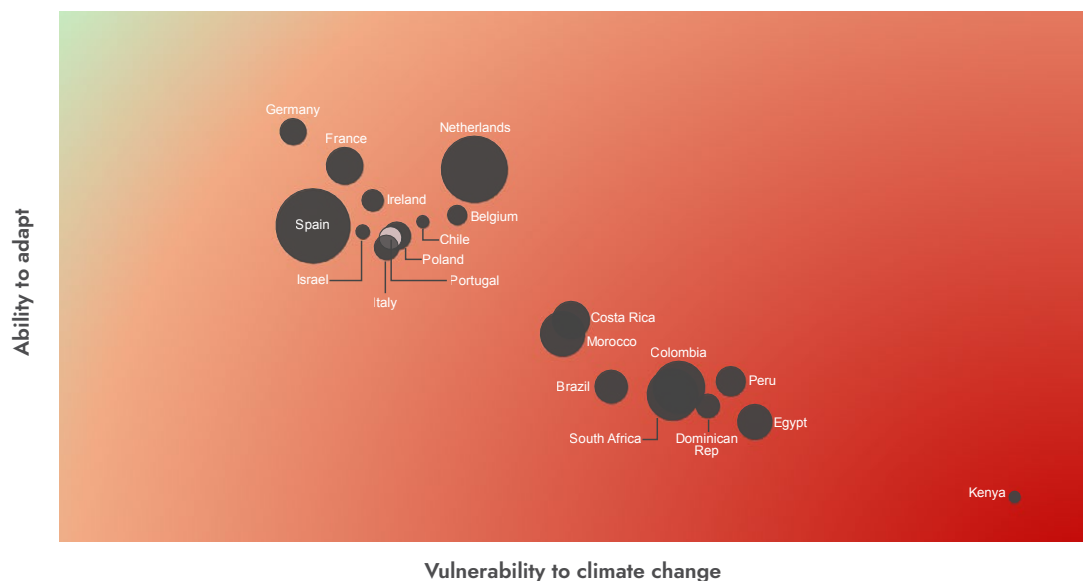
¹ Figures 5, 6 and 7 use import trade data which shows The Netherlands as one of the biggest UK exporters of our top 20 fruit veg and beans. However, this doesn't mean it produces all the fruit and veg being exported. The Netherlands is one of the largest global re-export hubs and a huge proportion of fresh produce is registered in trade databases as imports from the Netherlands, regardless of where they were originally grown. Similar distortions can occur wherever produce passes through major international trading and distribution hubs, meaning import statistics do not always reflect the original country of production.

FIGURE 6: UK fruit and vegetable imports by type (top 20) and country of origin (top 30): total import volume (tonnes)



Source: Created by Dr Sylvia Vetter, University of Aberdeen, using 2025 data provided by ECIU from UK Trade Info from HM Revenue and Customs.

FIGURE 7: Climate vulnerability of top 20 countries the UK imports from, versus their ability to adapt (ND-GAIN score). Bubble size represents imported volume to the UK in tonnes.



Source: Data provided by ECIU from UK Trade Info from HM Revenue and Customs, 2025.

- Size of circle correlates with import tonnage to the UK.
- Vulnerability to climate change was taken from the vulnerabilities sub-index of the Notre Dame Global Adaptation Initiative (ND-GAIN), with observed values ranging from 0.29 indicating low vulnerability to 0.52 indicating high vulnerability.
- Adaptive capacity was taken from the ND-GAIN readiness index, measuring economic,

governance and social readiness, with observed values ranging from 38 to 69. As these indicators were measured on different scales, values were standardised using z-score transformation.

- For each indicator, values were expressed as the number of sample standard deviations above or below the mean, allowing direct comparison between metrics despite differences in their original units and ranges.



BANANAS, CITRUS AND TOMATOES

IGD's analysis of ten commodities representing 55% of the UK diet (including bananas, barley, citrus, tomatoes, milk, potatoes, soy, sunflower, wheat, white fish) found that imported fruit and veg – particularly tomatoes, citrus and bananas – are the most

vulnerable to climate change (IGD, 2025b). It found that under current projections:

› the price of tomatoes could increase by £5.20/kg by 2050 due to concentrated exposure in water-stressed sources.

› the absolute climate-induced production costs by 2050 would be approximately £1.3bn (based on changes in the yield), primarily from water stress in key sourcing regions, particularly Spain, which is the largest market for citrus fruits imported to the UK.

KEY LEVERS TO BOOST CONSUMPTION OF FRUIT, VEG AND BEANS

Alongside measures to boost domestic production of fruit, veg and beans, targeted interventions to boost consumption are needed in tandem. Key levers include:

PUBLIC SECTOR PROCUREMENT

- Public sector food procurement is one of the most direct and powerful levers available to government for shifting the nation towards healthier, more sustainable diets, with around £5 billion spent annually on public food and catering across schools, hospitals, prisons and other public institutions (Will Quince MP, 2024).
- Schools are a particularly important setting where increasing the provision of fruit, vegetables and beans can help shape children's eating habits from an early age, increase consumption of healthy foods and create stable, long-term demand for UK growers.

THE SCHOOL FRUIT AND VEG SCHEME

- Each day this scheme provides a free piece of fruit or veg to every 4–6-year-old who attends a fully state-funded primary school. It helps to support children's nutrition as well as promote longer-term healthier eating habits by normalising the regular consumption of fruit and veg.

HEALTHY START

- This NHS scheme provides digital vouchers for low-income families during pregnancy and early childhood to afford healthier food such as fruit, vegetables and milk. The scheme is unique in directly saving families money on their food bill, helping them to afford the nutritious food needed to support healthy growth and development for their children and delivering long-term social and economic benefits. However, the scheme remains underpowered and is not sufficiently resourced to adequately address the impacts of the cost-of-living crisis on very young children.

FRUIT AND VEG SOCIAL PRESCRIBING SCHEMES

- Alexandra Rose Charity provides fruit & veg on prescription. It reported in 2022 that 80% of participants of its projects in London boroughs now eat five portions of fruit and vegetables a day, with GP visits having decreased by 40% (Alexandra Rose Charity, 2023).
- The Fresh Street scheme provides vouchers for locally supplied fruit and veg. A 2022 study of the scheme in areas of high deprivation in Barnsley and Sheffield found that most eligible households joined the scheme (83%), and many reported it made them think about what they were eating and prompted them to buy and eat more fruit and veg as a result (Relton et al., 2022).

ADVERTISING

- Fruit and veg advertising, such as the 5-A-Day campaign and **Veg Power's** campaigns, can drive aspiration and normalise consumption. 40 million people have been reached every year since 2019 by Veg Power's 'Eat Them to Defeat Them' children's advertising campaign and this work has led to the consumption of a billion children's portions of fruit and vegetables (Veg Power, 2022).

How might climate change affect the fruit and veg we grow here?

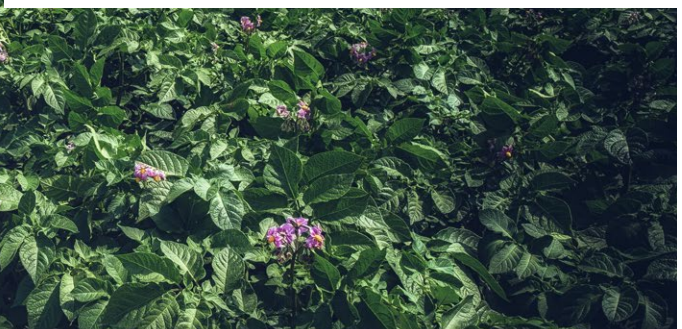
As has been outlined, the UK is *currently* less exposed to climate change than many of its global suppliers. However, it is by no means unaffected, and UK agriculture is becoming more vulnerable to the changing climate with increasingly unpredictable seasons, and warmer, drier weather, more extreme rainfall and increased flooding having had detrimental effects on recent harvests (AHDB, 2025). ECIU reports that **three of the five worst harvests on record in England have occurred in the last ten years**, with farmers losing £1bn during the extremely wet winter of 2023/2024 (ECIU, 2025a & 2025b). It is projected that, by 2070, farms will have to cope with up to 30% wetter winters, compared to 1990, and lower summer rainfall is expected to intensify water scarcity (Green Alliance, 2026). The UK is currently not prepared for the impact of climate change and has been rated as 'inadequate' by the CCC who recommend a dramatic improvement in the UK's climate adaptation plans. **The CCC predicts that without adaptation by 2050 and with 2°C of global warming, the amount of high-quality farmland will drop from an average of around 40% of land in England and Wales (between 1961 to 1990) to just over 10% (CCC, 2026).**



If the UK is to maintain (or increase) domestic production, there needs to be much greater focus on climate adaptation and building resilience on farms, as well as strengthening local food systems and supply chains.

Moving towards more sustainable forms of agriculture with reduced use of artificial fertilisers and pesticides would improve soil health and maintain healthy ecosystems, and growing a larger number of different crop varieties would help to build resilience. However, more research, evaluation and scaling up of sustainable production practices (such as regenerative, organic and agroecological agriculture) are needed to test and protect against any potential drops in crop productivity and yield (The Food Foundation, 2025c).

At the same time, more research is needed to identify which fruit, vegetables and beans, pulses and other legumes will become more (or less) viable as the climate and nature crisis increasingly impacts the UK. Modelling by the UK Centre of Ecology & Hydrology – which assessed expected impacts on around 160 current and future crops under different warming scenarios – found substantial increases in suitability for pulses and legumes not currently grown widely in the UK, including chickpea, cow pea, and soy (Redhead, et al., 2025). This supports the CCC's recent report which forecasts that chickpeas will become viable in the south of the UK due to warmer average temperatures (CCC, 2026). Producers may already be seeing opportunities in this area; a recent AHDB report highlights legumes as an opportunity for home grown protein (AHDB, 2025).



How might climate change affect prices of fruit and veg?

The Food Foundation is supporting a **consortium** of academics and civil society partners to assess the extent of recent climate-induced food price shocks on UK food supplies, prices, and production. Research into how climate change might affect prices of fruit and veg in the UK is currently ongoing, and we will be able to provide in-depth price analysis when this data is published shortly as part of the **Climateflation project**.

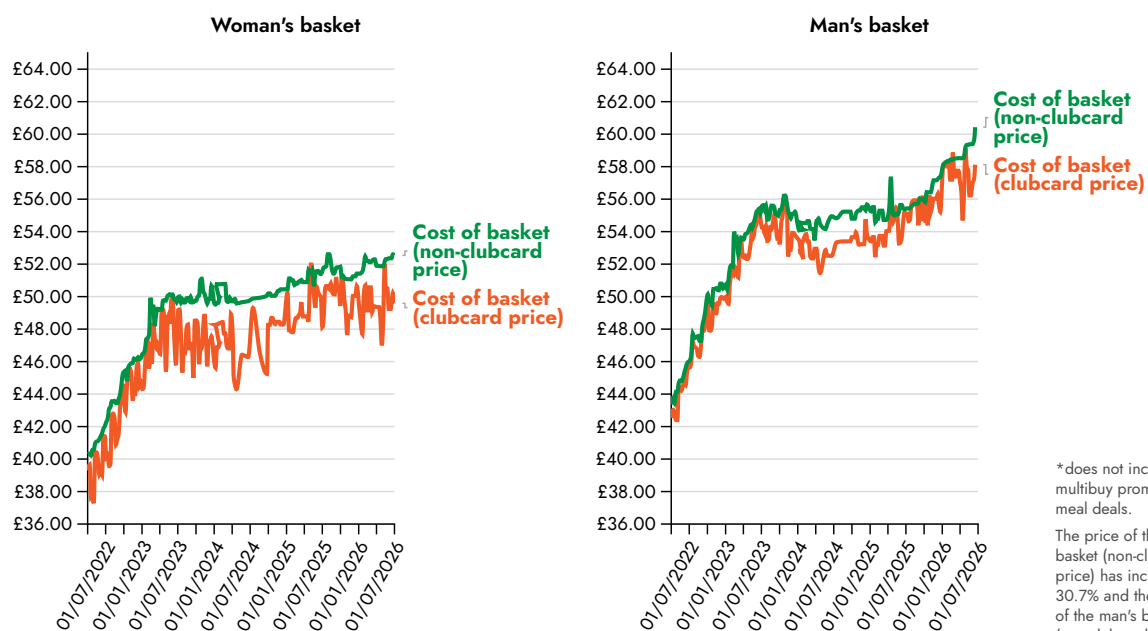
What we already know is that restricted supplies usually lead to higher prices, and this means low-income families could have even more reduced access to healthy diets. **Between 2022 and 2023, climate impacts added an estimated £361 to the average household food bill** (ECIU, 2023b).

The rising cost of The Food Foundation's **Basic Basket** of food (shown in Figure 8) shows how prices

have increased significantly in recent years, with the UK experiencing the worst food price inflation in a generation. **Since April 2022, the absolute cost of a basket of food for an adult female and adult male as part of a reasonably costed, adequately nutritious diet has increased by 31% and 38% respectively.**

According to analysis by ECIU, when food prices rise, they don't tend to come down, rising rapidly during shocks but reversing only slowly and partially afterwards (ECIU, 2026). The research finds that on average, shelf prices give back just 1% of the original rise after six months, 5% after a year and 7% after two years. This is reflected in Figure 8 - despite the geopolitical pressures of 2022 and 2023 lessening over 2024 and 2025, there is no reversal or overall decrease in prices.

FIGURE 8: Weekly prices of a basket of food for an adult male and adult female as part of a reasonably costed, adequately nutritious diet



Source: Basic Basket Tracker, The Food Foundation, 2026.

Keeping it local – seasonal, local fruit and veg is the way forward

Stable prices

Shorter supply chains, including direct-from-farm, or Community Supported Agriculture (CSA) subscription schemes, can be more price-stable than supermarket channels during periods of external shock. This is because they are less exposed to the import price volatility, currency movements and logistics costs that supermarkets depend on and instead prices are often determined by seasonal agreements, subscriptions and producer-consumer relationships. Moreover, prices for highly perishable products like fruit and veg which are not commodity traded (like wheat, for example) are less driven by world markets, and therefore shorter supply chains create more stable prices.

There is evidence for this in other countries; in Canada, farmers markets experienced lower price increases than national retailers from 2018-2023, as well as less frequent rises (Stephens et al., 2025). This included potatoes (3.81% vs 7.12% annually), as well as onions, eggs, carrots, apples, strawberries and cabbages.

We compared the price per kilogram of a basket of nine fresh fruit and vegetable products (Apples, Pears, Carrots, White Cabbage, Brown Onions, Salad Tomatoes, Whole Cucumber, and Red Peppers) since April



2022 from three sources: retail prices in a major supermarket, Defra's national wholesale prices, and lastly wholesale prices from Better Food Shed, the non-profit organic wholesale arm of Growing Communities which supplies local food businesses, schools and food programmes with fruit and veg from small to medium farms in the Southeast of England (sometimes supplemented by produce from equivalent farms in Europe depending on seasonality).

We found over the three-year period (from July 2023 to June 2026), taking a 12-month rolling average, national wholesale prices fell by 11.8%, local organic wholesale increased by just 2.5%, while consumer prices increased by 18.8%*.

This limited increase in local organic wholesale price is supported by other local organic producers; Ripple Farm Organics,

whose veg box prices increased by an average of just 5.8% between September 2022 and June 2024. Whilst this increase is higher than for national wholesale, it is below national food price inflation which was 7.9% over the same period (ONS, 2026).

In general, although organic wholesale prices do fluctuate, this is mainly determined by growers' yields and times of the year when the product is out of season in the UK and therefore more is imported from Europe. In other words, organic food is at its most affordable when it's grown in the UK.

As a growing organic wholesaler Better Food Shed has insulated customers from price rises by working with more UK growers (enabling them to maintain a constant supply of staple crops) and carefully introducing direct imports from European growers to plug any gaps in UK grown produce.

*Calculating a rolling average gives a clearer picture of medium- to long-term price trends by smoothing out month-to-month volatility, including seasonal price fluctuations. Comparing two single months instead risks the result being driven by whether each snapshot happened to fall during a seasonal peak or trough, reflecting random effects of timing rather than genuine long-term change.

Stable availability

Availability of local fruit and veg with shorter supply chains is also shown to be more stable during periods of volatility. This is exemplified during the Covid-19; during which the UK demand for local food surged by 111% as supply remained stable while supermarket supply faltered (The Food Foundation, 2020).

In France, research shows short food supply chains generally proved resilient during the pandemic and, in some cases, buffered consumers from disruptions in international logistics (Deroche-Leydier, 2025). France has one of largest networks of AMAPs (Associations for the Maintenance of Peasant Agriculture), where households buy directly from local producers, often via subscriptions. Many AMAP schemes saw increased demand and continued operating while parts of conventional retail and hospitality supply chains were disrupted. Prices were often agreed for an entire season or subscription period, meaning consumers were less exposed to short-term wholesale price spikes.

Overall, shorter supply chains should be more supported, as they diversify routes to market and moderate price volatility during periods of disruption, all contributing to higher levels of resilience.

A seasonal UK basket of fruit and veg – growing the market and the British slice

Our tastes have shifted towards more exotic fruit and vegetables, but the Government and food businesses could do a lot more to inspire and inform around

what's in season in Britain and celebrate these products – on plates in public settings; on menus in restaurants; clearly sign posted in supermarkets; encouraging local community growing to help people to understand what's in season and when.

The UK has a core basket of 49 different fruit and veg, and in any given month of the year between 18 and 43 varieties are available and being sold in shops (See Figure 10). Having this seasonal basket could set a north star for boosting production and consumption of this fruit and veg, with a set of policy and business measures aligned around that goal.

Growing veg locally – opportunities to strengthen resilience, health and environment

Several London councils, including Hounslow, Southwark and Hackney, have introduced the Right to Grow initiative to turn wasteland into allotments, community gardens and orchards - and there are calls to expand this to a London-wide policy.

Community gardening offers benefits such as:

- Fruit and veg becoming more familiar and appealing to people, particularly children, due to an increased connection with food growing.
- Improved health and well-being for people with a range of health and social needs due to nature connection and exercise associated with gardening.
- More people attracted into horticultural training and careers due to public engagement.
- Enhanced nature and ecosystem services, reduced pollution, waste and greenhouse gas emissions.



FIGURE 9: A seasonal guide to British fruit and vegetables

	WINTER			SPRING			SUMMER			AUTUMN		
	December	January	February	March	April	May	June	July	August	September	October	November
Apples												
Apricots												
Asparagus												
Aubergines												
Beetroot												
Blackberries												
Blackcurrants												
Blueberries												
Broad beans												
Broccoli												
Brussels sprouts												
Butternut squash												
Cabbages												
Carrots												
Cauliflowers												
Celeriac												
Celery												
Cherries												
Courgettes												
Cucumbers												
Fennel												
Gooseberries												
Leeks												
Lettuce												
Marrows												
Mushrooms												
Onions												
Parsnips												
Pears												
Peas												
Peppers												
Plums												
Potatoes												
Pumpkins												
Purple sprouting broccoli												
Radishes												
Raspberries												
Redcurrants												
Rhubarb												
Rocket												
Runner beans												
Spinach												
Spring onions												
Strawberries												
Swedes												
Sweetcorn												
Tomatoes												
Turnips												
Watercress								 </				

Conclusion and recommendations



The Government should ensure that the UK has a Horticulture Sector Growth Plan fit for the future. This should include an action plan on boosting domestic production and consumption of fruit, veg & beans, ensure affordable access to healthy, climate-friendly food and fair prices for British farmers. It should bring new focus to strengthening local supply chains and boosting resilience. It should also be backed by long-term statutory targets to increase the national average consumption of fruit and veg and increase the proportion of the fruit and veg supply which is produced in Britain. Finally, it should implement policies which enable and incentivise private sector investment into the horticulture sector.

REQUIREMENTS FOR A GOVERNMENT HORTICULTURE SECTOR GROWTH PLAN:

- 1 Set statutory targets via a Good Food Bill** to include a legally binding target to increase the national average consumption of fruit and veg among children and increase the proportion of the fruit and veg supply which is produced in Britain by 2040.
- 2 Boost demand and affordable access of fruit, veg and beans – based around a seasonal British basket**
 - › Deliver on the manifesto commitment to ensure that 50% of all food procured across the public sector is produced locally (or certified to higher environmental standards). Introduce targets into Government Buying Standards on food spend certified to Higher Environmental Production Standards (HEPS) and via dynamic procurement models measuring farm level sustainability. This will benefit SMEs and local producers who have short supply chains.
 - › **Reinvent Healthy Start** as a bigger, more impactful scheme by increasing the eligibility criteria so that it reaches more families in poverty and increasing the value of the scheme in line with food price inflationⁱⁱ.
 - › Expand fruit and veg social prescribing schemes, using the successful Fresh Street and Alexandra Rose Charity models.
 - › Invest in advertising for British, seasonal fruit, veg and beans to drive aspiration and to normalise consumption, building on the work of initiatives like Veg Power.
 - › Introduce mandatory reporting for large food businesses on their sales of fruit, veg, and plant protein. This will provide businesses with an incentive to invest in sales of fruit, veg and beans and better promote these categories, driving up demand as a result.
 - › Invest in R&D focusing on convenient, minimally processed plant-rich food and developing new products to add to the UK basket.
 - › Set a kitemark for food businesses which major on using the seasonal British basket for 70% for their fruit and veg.

ⁱⁱ Expand eligibility: *New analysis* finds that expanding eligibility to all families in receipt of Universal Credit would return £2.36 for every £1 invested. The net benefits to society would be worth £7.7 billion over 10 years as a result of the reductions in food insecurity, increased household disposable income, and wider economic gains.

Increase value: targeted interventions run by retailers to increase the value of the scheme for low-income households have shown strong evidence of impact, leading to increases in fruit and veg purchasing (Thomas et al, 2023).

3 Invest in boosting production and farm resilience

- Introduce a replacement Fruit & Vegetable Aid Schemeⁱⁱⁱ to provide increased funding for growers across the whole horticulture sector.
- Adapt Defra payment schemes such as The Farming Equipment and Technology Fund (FETF) and SFI to support small-medium scale growers (including those under 3ha in SFI).
- Introduce a **Market Garden Support Fund** for market gardens, peri-urban farms and community-supported agriculture (CSA) schemes that don't currently qualify for support from existing schemes.
- Scale up R&D in:
 - Legume breeding & agronomy, particularly agronomic risk reduction, developing UK traits for genetic improvements, pulse crop diversification, and added-value processing (The Food Foundation, 2026d).
 - Climate-resilient crops and farm adaptation.
 - Independent farming knowledge exchange services. Qualitative surveys with growers repeatedly highlight this as an area in which farmers would like support (Table, 2025).
 - Alternative protein processing and new product development, particularly based on domestically grown plant-based ingredients e.g., oats and peas.
- Invest in water and energy security infrastructure (storage, distribution, grid capacity) and provide greater recognition of energy intensive horticulture sectors within energy support schemes.
- Reform planning policy to support horticultural infrastructure — reservoirs, greenhouses, polytunnels, packing sheds — while protecting best the agricultural land. The recent National Planning Policy Framework (NPPF) consultation could be a step in the right direction here.

4 Secure fair returns and shorter supply chains

- Strengthen the powers of the Groceries Code Adjudicator and ensure that the planned Fair Dealing Regulations for the fresh produce sector are sufficient for protecting growers from imbalanced contractual terms.
- Support Local Food Partnerships, looking to Wales & Scotland for inspiration^{iv}.

5 Build the workforce

- Introduce a national horticulture training programme (paid apprenticeships, accredited traineeships, mentoring).
- Set up a wider skills and retention plan for existing workforce^v.



ⁱⁱⁱ The scheme (which closed in 2025) provided grants to Producer Organisations (cooperatives of smaller growers, coming together to market their produce and collectively agree prices without compromising competition rules, improving their position in the supply chain), based on the value of produce it sold.

^{iv} Since 2022, the Welsh Government have been funding every local authority in Wales to support local food partnerships which bring together partners from a range of different sectors (including Health Boards and Local Authorities, citizens, voluntary organisations, charities, food businesses, retailers, wholesalers, growers and farmers) to help tackle social, economic and environmental issues, and respond to the specific needs of the area (Food Sense Wales, 2026). This is part of an overall goal to [AE8] encourage the production and supply of locally sourced food in Wales, target pressures associated with cost of living and food poverty and embed new resilience into local food systems (Welsh Government, 2025). Scotland's Good Food Nation Act (2022) places great emphasis on local food systems, requiring all 32 local authorities to create specific food plans that empower communities, support regional economies, and increase local food access (Scottish Government, 2025).

^v A 2025 survey indicated that half (51%) of farmers considered quitting in the preceding year (McCain, 2025), with the total number of people working on agricultural holdings in England falling by 1.9% between 2024 and 2025; continuing the general downward trend seen in the last three years (Defra, 2025d).

RECOMMENDATIONS FOR BUSINESSES:

- 1** **Retailers, restaurants and high street chains should work with the Government on kitemarking a seasonal basket of fruit, veg** and invest in marketing to promote these products.
- 2** **Support calls for the introduction of mandatory reporting** for large food businesses on sales of fruit, veg, and plant protein.



RECOMMENDATIONS FOR INVESTORS:

Investors should see the Horticulture Sector Plan as an opportunity for supporting and enabling growth in the sector and reducing current vulnerabilities in supply chains and should encourage the Government to implement enabling policies so they can confidently invest in horticulture infrastructure.

Areas for consideration:

- 1** **Invest in the 'missing middle' to build infrastructure and capacity**, glasshouse infrastructure, technology and innovation, and ensuring adequate processing facilities across the UK for legumes. For example, currently there are only limited primary and secondary processing facilities for legumes in the UK, and none in Scotland (Moxey, A & Tregear, A., 2026).
- 2** **Invest in infrastructure to support the distribution of regionally and agroecologically produced fruit and veg.** In strategic locations, where regional supply can meet demand, invest in distribution and processing infrastructure such as produce hubs which provide individuals, businesses and public procurement contracts with sustainably produced fruit and veg. This will help to rebuild regional food supply chains and support more diverse, farmer-focused routes to market (UKFVC, 2025).

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