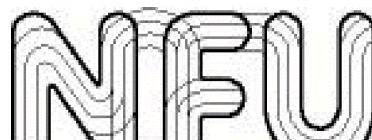


Growing Great Britain: Horticulture Facts and Figures

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OVERVIEW

The horticulture sector is a major part of Britain's agriculture industry, providing jobs in rural areas, supplying high quality, locally grown produce to consumers and contributing significantly to rural economies and local communities. It is also one of the most advanced sectors within British agriculture, especially in the areas of research and development and environmental stewardship and responsibility.

Here are some facts and figures about the horticulture sector, its value and contributions, and the efforts British producers put into safeguarding the environment and growing wholesome, high quality products for consumers both here and abroad.

GENERAL INFORMATION

- The main sectors of the UK horticulture industry are vegetables, fruit, salads and ornamentals.
- Vegetables, fruit and salads include apples, asparagus, aubergines, beetroot, beans, black currants, broccoli, brussel sprouts, cabbage, carrots, cauliflower, celeriac, celery, cherries, chicory, courgettes, cucumbers, fennel, gooseberries, grapes, herbs, kohlrabi, leeks, lettuce, mushrooms, onions, parsnips, pears, peas, peppers, plums, radish, raspberries, rhubarb, spinach, strawberries, swedes, sweet corn, turnips, tomatoes and watercress.
- Ornamentals include bulbs and flowers grown in the open, hardy ornamental nursery stock such as trees and shrubs, bedding plants, pot plants and cut flowers grown under glass.
- The main flower and plant crops grown in the UK are flowering houseplants (African violets, azaleas, begonias, gerberas, kalanchoes, potted bulbs), bulbs (daffodils, narcissi and tulips), chrysanthemums, foliage, freesia, iris, roses, lisianthus and seasonal summer flowers (asters, delphiniums, solidaster and sunflowers).

THE ECONOMIC IMPORTANCE OF HORTICULTURE

- In 2000, the gross output of horticulture was approximately £1.781 billion, or 11.9% of the total agriculture industry in Great Britain. If the added value of packing etc., is included, this figure is increased to around £3 billion.
- Vegetable production is valued at £877 million annually. Mushrooms are the largest contributor to this figure, worth £150.6 million in 2000. Indoor tomatoes were valued at £77 million, and lettuce £63 million in 2000.
- Fruit accounted for £222 million in 2000, with the largest component being strawberries at £76.5 million, followed by dessert apples at £36 million and raspberries at £26 million.
- The ornamental sector is worth around £674 million annually, having increased its total value by 50% during the 1990s. The largest ornamental sector is hardy nursery stock, which accounts for 49% of total production and a total value of £284 million. Of hardy nursery stock, shrubs are the largest component, with a value of £43 million a year. Roses are worth £28 million a year and ornamental trees are valued at £22 million.
- At the retail level, the UK fresh cut flower and indoor plant market is worth over £1.45 billion, which represents an average annual spend per person of £26.

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- Approximately 60% of the £1.45 billion spent represents people buying flowers and plants for themselves and for their own homes. This is a significant change from even five years ago, when most people in the UK only bought flowers for special occasions and as gifts.
- Average household spending over the past ten years on "live" horticultural products, whether for home or garden, has increased by 42%. This includes plants, shrubs and bulbs.
- More than 10,000 acres (around 4000 hectares) of outdoor bulbs and bulb flowers are grown annually, with value of around £24.8 million. More than 8700 of those acres (3500 hectares) are daffodil bulbs and flowers, valued at approximately £15.6 million.
- In the East Midland county of Lincolnshire, horticulture represents one third or £206 million of the region's £620 million annual agricultural output.

Production

- East Anglia is the largest horticulture-producing region in the UK with 41,761 hectares. Norfolk has the most horticulture production in East Anglia with 16,755 hectares. Following closely behind East Anglia in horticulture production are the East Midlands with 37,162 hectares (Lincolnshire has 32,733 of that production area within its county limits), and the Southeast with 24,131 hectares. Kent is the largest horticulture-producing county in the Southeast with 15,274 hectares.
- 2.97 million tonnes of fruit were produced in the 2000/01 crop year. This is production for the home market only. Including exports, production was 3.5 million tonnes during that crop year.
- 28.8 million tonnes of fresh produce were produced in the 2000/01 crop year. Including production for export, this figure increases to 29.8 million tonnes.
- 41% of the UK's national crop of bulbs and flowers in the open are produced in Lincolnshire on approximately 2,000 hectares.
- Crop production is greatly impacted by the weather, and a year with adverse weather conditions can see a drop in yields of 15-20%.

Exports

- Horticulture exports in 2000 were valued at around £102 million, of which £39 million are ornamentals, £33.9 million are fruit and £29.5 million are vegetables.
- In the fruit sector, apples were the most exported domestically grown fruit with 183,000 tonnes in 2000.
- Of fresh vegetables, beans are the largest component with 443,000 tonnes exported in 2000, followed by carrots and turnips at 121,000 tonnes.
- Dried beans made up the largest component of dried vegetable exports, with 1.7 million tonnes in 2000.
- Exports of fresh and dried vegetables increased to 3.5 million tonnes in 2000, up from 3.2 million in 1999.
- Over 9,800 tonnes of bulbs were exported from the UK in 2001, with an approximate value of £7.1 million. Narcissi were the main bulb export, with 7,351 tonnes, the majority of which went to the Netherlands, the USA, Germany and Sweden.
- The bulk of UK horticulture exports, of which dried vegetables are the most popular, go to European Union countries, with the Irish Republic, Italy, Spain, France and the

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Netherlands among the largest customers. Outside the EU, Egypt is the largest importer, followed by Israel and Saudi Arabia.

Imports

- The UK is a net importer of horticultural products, with imports in 2000 valued at £2.949 billion.
- Imported fruit makes up 90% of domestic consumption, with a value of £1.4 billion in 2000.
- The UK is 71% self-sufficient in vegetables, meaning that imported vegetables make up only 29% of the UK market, valued at £960 million in 2000.
- Ornamental imports in 2000 are valued at £588.

EMPLOYMENT AND CONTRIBUTIONS TO RURAL COMMUNITIES

- The horticulture industry is a major employer in many rural areas.
- In England and Wales, 43,000 full and part time workers, as well as tens of thousands of seasonal or casual workers, are employed in this sector. This represents 25-30% of all jobs in agriculture.
- Many horticulture businesses are family run enterprises that play a central role in their local communities. For example, many ornamental businesses provide plants for public display, and often open their doors to visitors and school children alike for both educational and recreational purposes.
- Attracting sufficient workers at all levels is an ongoing problem for growers and one that is recognised by the Government. In order to help, the Government has agreed to an increase in the number SAWS (Seasonal Agricultural Workers Scheme) permits to 20,200 in 2003.

LOOKING AFTER THE COUNTRYSIDE

- Britain's horticulture industry has a positive impact on the environment, as growing fruits, vegetables and plants actually removes carbon dioxide from the atmosphere.
- New methods and techniques, the recycling of rainwater and integrated pest management systems are widely used by growers as part of their commitment to environmental stewardship.
- Almost 90% of respondents to an NFU survey conducted in 2000 had a wetland landscape or wildlife habitat on their land and 80% of these had taken active steps to conserve those wetlands in the last five years.
- Positive effects on the landscape, as well as the local tourism industry, would not be possible without orchards and hop gardens. Kent, for example, is renowned for its beauty and is known as the Garden of England.

Energy Conservation

- UK horticulture has increased its energy efficiency by approximately 25% in the last decade.
- In the same survey, 70% of growers said they have taken measures to reduce the amount of energy they use, mostly through better control of heating and lighting systems, ventilation and insulation.

Water Use

- Over three quarters of survey participants have reduced their use of water through trickle irrigation, increased use of on-site reservoirs and water recycling, and 48% are improving packaging methods.

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- Nearly two thirds of respondents said that they are more efficient in their use of water today than they were five years ago, and more than half have made plans to increase further their water efficiency over the next five years.
- Nearly 40% either collect rainwater or recycle water for use on their farms.

Legislation and Regulations

- Current actual and planned environmental legislation and regulations affecting British growers include:
 - Nitrates Directive
 - Ground Water Regulations
 - Climate Change Levy
 - Waste Regulations
 - Packaging Waste Regulations
 - Landfill Directive
 - Water Bill
 - Pesticides Tax
 - Local Environmental Risk Assessments (LERAPs)
- Many of these come with considerable expenditure to the industry every year. For example, the Packaging Waste Regulations require growers to pay an annual registration fee of £460, along with several thousand pounds for recovery and recycling, depending on the type and quantity of waste. And the proposed pesticides tax would add 25% more to the bill for each horticultural unit.
- The NFU is involved in all these areas in an effort to reduce the impact of the legislation on the industry.

PRODUCING A SAFE, WHOLESOME PRODUCT

- The sector has taken immense strides in recent years to ensure consumers are provided with a safe, wholesome product that is produced in a manner that is also kind to the environment.
- The best example of this is the introduction of a scheme called Assured Produce, which assures consumers that produce has been grown according to a strict set of production standards.
- 67% of UK fruit and 91% of salads are grown under the Assured Production scheme. Nearly 4000 growers across the UK, with more than 220,000 hectares under production, belong to the scheme.
- The standards, policed by independent inspectors, cover all aspects of the production process, from planning what crops to grow, to cultivation, plant health, harvesting, storage and looking after the countryside. Separate protocols spell out best practices for each of the 45 crops grown under this scheme.
- The scheme is jointly owned by growers and supermarkets, and was developed ten years ago with the original aim of creating a consistent set of production standards.
- Any produce grown under this scheme is eligible to carry the British Farm Standard label, also known as the Little Red Tractor. It is an easily recognisable symbol that is placed on packaging so that when shopping, consumers can clearly identify food grown in the UK under the Assured Produce scheme.

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PESTICIDES AND HERBICIDES

- Application of herbicides and pesticides is strictly controlled by recognised Codes of Practice. The Department of Environment, Food and Rural Affairs (DEFRA) also runs an extensive surveillance programme to ensure that the safety guidelines are met.
- Farmers also use new methods of plant health control. For example, 60% of UK growers indicated in a 2000 NFU survey that they have reduced their reliance on pesticides through integrated pest management and biological control, which both utilise natural methods to minimise pest damage.
- One of the biggest problems facing the industry is access to adequate crop protection materials.
- A proposed tax on pesticides currently being considered by the Government would add 25% more to the bill for each horticultural unit.

RESEARCH AND DEVELOPMENT

- 62% of respondents in a 2000 NFU survey said they are investing in new product development and ways to add value to existing products.
- Horticulture as an industry spends over £5 million on research annually, most through support of Horticulture Research International (HRI), which is the primary UK organisation responsible for R&D in this sector. This is currently under threat and the NFU has been lobbying to keep it in place.
- Government support of horticulture research has decreased by around 19% or approximately £2 million in the past five years.
- Research of all kinds is funded by horticulture, from how to meet legislative requirements to new product development to maximising the use of inputs to product quality.

ORGANIC PRODUCTION

- Organic production, where the use of artificial pesticides and herbicides is restricted or even banned, is a fast-growing sector in UK agriculture, increasing at a rate of 33% during April 2000-01.
- The farm gate value of UK produced organic commodities, of which horticulture is an important part, approached £100 million between April 2000 and April 2001.
- Organically managed land in the UK accounts for 3.2% of total agricultural land.
- The potential in this sector for horticulture is tremendous, as the UK is the fastest growing organic market in Europe. Currently, about 85% of organic produce sold in the UK is imported.
- The Government's English Organic Action Plan was launched on 29 July 2002. One of its key recommendations was to encourage English producers to supply a greater proportion of the organic primary produce consumed domestically, bringing the UK organic market share to at least 70%.

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GOVERNMENT SUPPORT AND SUBSIDIES

- Unlike most agricultural sectors, horticulture receives very little direct government support.
- Major support from Government comes from Research and Development funding, which has been falling in recent years (see Research & Development section above).
- Other areas of support are the EU Fruit and Vegetables Regime and from the Department of Health for 5-a-day and healthy eating.

CONCLUSION

Horticulture is a vibrant and essential part of the agriculture industry in the UK. In a 2000 NFU survey, more than 60% of growers stated that they are confident about their trading future - despite the continuing strength of sterling and lack of government support. This confidence is reflected in the steps they are taking to ensure they have a healthy future and comes in many forms, from funding research to develop new technologies to adopting more environmentally friendly growing practices and taking care