



Retailer Webinar

MARCH 2026

Welcome from today's chair



Charlotte Smith
Broadcaster



Today's panel



Ali Capper
**Executive Chair
British Apples
and Pears**



Tom Hulme
**Managing
Director
A C Hulme &
Sons**



Claire Donovan
**Consultant and
Food
Production
Specialist**



Tony Harding
**Procurement &
Technical
Director
Worldwide Fruit
Ltd**

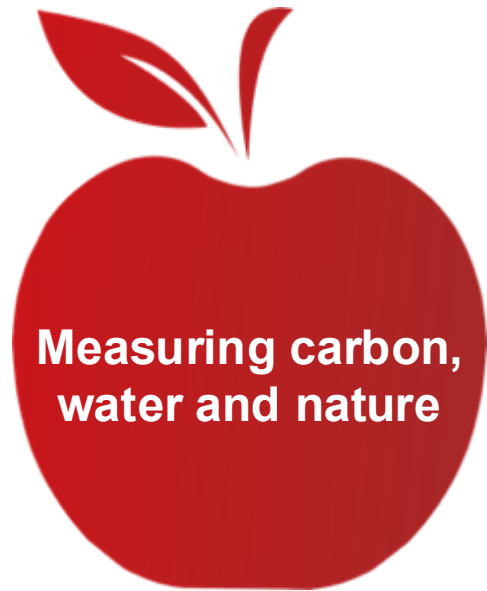


Mark Gaskain
**Director at
Gaskains Ltd
and Prime
Produce Ltd**

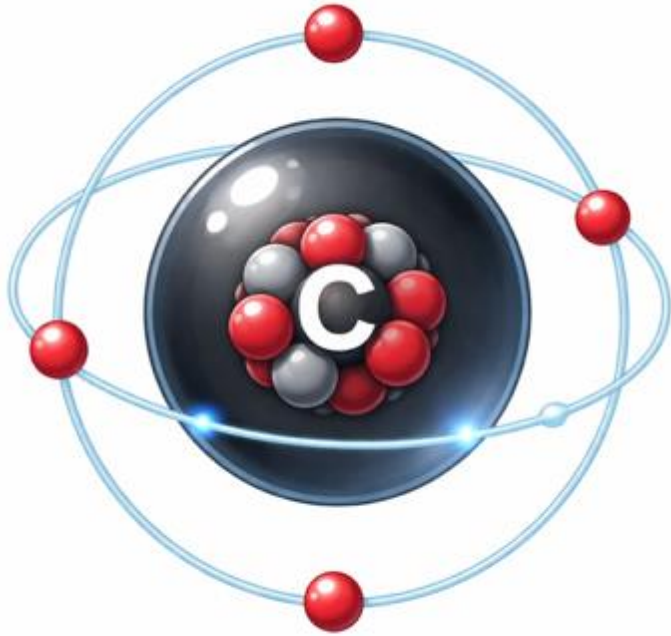


Tom Christensen
**Commercial
Manager
Adrian Scripps
Ltd**

Agenda



Measuring carbon, water and nature



What is the shared benefit?

For retailers:

- Highly robust data set
- Representative sample of growers per retailer – at least 15%
- Measure improvements in a low emission crop – every 3 years

For growers:

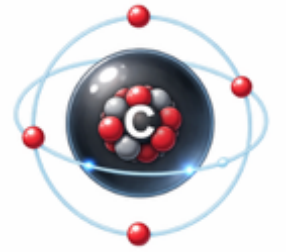
- Once and done – avoids repetitive, varied costly submissions
- Focus on grower/packers and their grower base
- One set of metrics on carbon, water and nature



Why?

Carbon

- Legislated targets



Water

- Resilience and food security – how do we produce more with less?



Nature

- Sustainability goals
- Orchards need pollination!

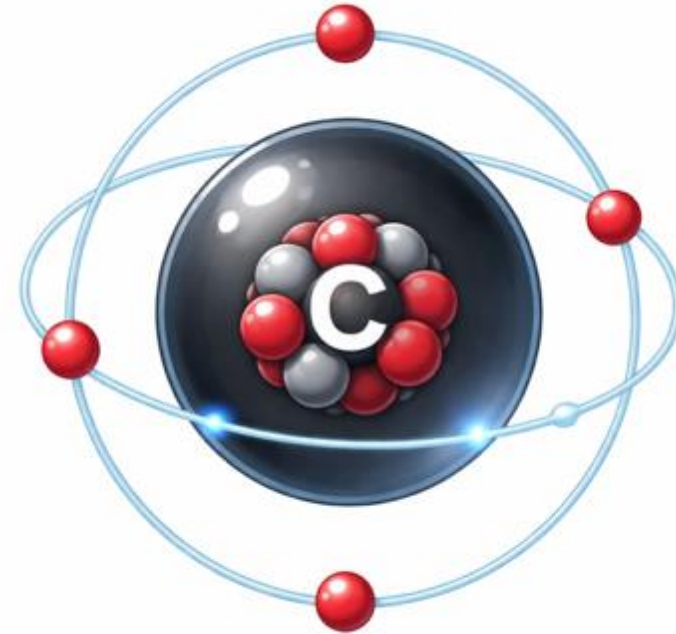


How – Phase 1

- Liaise with key retail contacts to understand potential concerns and thresholds that must be met to ensure project succeeds and gains the required acceptance
- Understand from the grower packers what is currently measured and recorded within the three pillars, and what software is used
- Work with all stakeholders to ensure the project is set up to ensure success – sample size, frequency, etc
- Build three-year cycle once baseline metrics are agreed, and then carry these out whilst ensuring from protocol group that no industry significant changes have occurred

How?

- Use the BAPL LCA as the basis
- Low emission crop – as the opportunities for reduction become available, growers will adopt
- Focus on changes to:
 - Packaging ~ **62.40%**
 - Plant Protection Products (PPPs) ~ 15.00%
 - Storage energy ~ 09.70%
 - Nitrogen ~ 02.85%
 - Fossil fuels (i.e., diesel, gas) ~ 00.01%



How?

- Establish irrigated volume (litres) of water/kg of apple and pear
- Establish water source/s
- Assess water usage/source
- Assess monitoring/reduction/optimisation equipment, where used
- Monitor changes, e.g. new on-farm reservoir



How?

- Utilise passive acoustic monitoring devices to analyse and count
 - Birds
 - Bats
 - Small mammals
 - Moths, insects (butterflies harder)
- Undertake worm counts for soil health and assess change
- Hedge, windbreak and wildflower assessments
- Record regen practices



Who?

- Retailer sustainability teams
- BAPL technical expertise from:
 - Claire Donovan (G's, M&S, Worldwide Fruit) and
 - Richard Brewer (Hochfeld, AMT, Tesco)



Big issues



Food Inflation

Inflation rate for the Consumer Price Index (CPI) in the United Kingdom from January 2015 to January 2026



Ukraine

Covid wake up

Source
Office for National Statistics (UK)
© Statista 2026

Additional Information:
United Kingdom; January 2015 to January 2026



Mitigate food inflation – apple size

- **Focus:** limit inflation - **Solution:** maximise crop utilisation
- British apples make up just 40% of all the apples eaten in the UK
- Demand for British apples remains strong and UK marketplace can easily accommodate 100% of the Class 1 British production volume
- The 2025 British apple crop was record-breaking, with a higher percentage of smaller fruit
- Many of our retail partners work to a 60mm+ spec for **core retail pack lines** and in doing so, have supported their British growers in whole crop utilisation
- Majority of UK retail (c.58% of the total UK grocery market, Kantar) is now helping UK growers utilise the whole crop. Sincere thanks to Tesco, Sainsbury's, Co-op, Waitrose and M&S this season
- We are calling on the remainder of UK retailers to build on their great work of supporting the sales of British apples and pears by working with growers to sell the **majority of the crop in core lines**, this year and the future
- Underpin your support for our British growers by using the whole crop every year



Seasonal labour

- Continues to be a key area of policy work
- SWS must remain a **5 year** programme for grower certainty
- Access to **higher numbers of seasonal workers** will be required to meet our growth ambition of 60% British apple in UK retail by 2035



Employer pays principle (EPP)

- Following the publication of the Employer Pays Principle Feasibility Study and subsequent multistakeholder roundtables in 2025, the Taskforce has prioritised the following activities for 2026:

“Co-ordinated Taskforce activity to scope the report-proposed Model 6 ‘Safeguarding Pot/Hardship Fund’ within the first quarter of 2026

Engagement on priority policy areas that came through the roundtable discussions including on government actions to improve seasonal worker finances, mitigate illicit fee charging, and minimise costs incurred by seasonal workers.”

- No economic models being progressed – unworkable and CMA issues
- Defra have confirmed they will not legislate for EPP



Audit burden

- New video to be launched from BAPL to highlight:
 - Audit volume
 - Duplication
 - Repetition
 - Cost
- BAPL would like to work with all retailers to reduce the audit burden for growers

SPS UK-EU reset: The context

The UK is a great place to grow apples and pears!

- British apples have a negligible blue water scarcity footprint due to predominantly rain-fed production*
- Cranfield University research identifies cold storage efficiency, electricity decarbonisation and **yield optimisation** as the primary levers for further emissions reduction*
- Plant protection products enable growers to optimise yield
- All fruit and veg crops are classed as minor use crops which adds a layer of additional regulatory approval integrity
- Consumers demand PERFECT apples and pears

*Tim Hess, Emeritus Professor of Water and Food Systems, Cranfield University, lead author
LINK TO STUDY: <https://www.sciencedirect.com/science/article/pii/S037837742500784X?via%3Dihub>



SPS UK-EU reset: The benefits

- Nursery trees imported from EU
 - Less paperwork for imports
 - Removal of UK BCP checks, accept EU nursery inspection
 - Reduces costs
- UK Chemical Regulatory Directorate approvals
 - Mutual recognition of EU approvals... BUT... UK CRD did not mutually recognise all EU approvals when the UK was in the EU!
- Export of fruit
 - Less paperwork
 - Reduces costs




SPS UK-EU reset: The risks

- We need a managed transition. A hard stop will mean:
 - The loss of currently approved actives
 - CRD will not provide overnight approval of the actives/biologicals approved in EU but not in UK
 - Competitive disadvantage for UK growers against EU competitors
- Why does it matter if UK has less plant protection products (PPP's) than the EU?
 - Lower yields, lower quality = British fruit is more expensive fruit per kg
 - Resistance issues
 - Higher carbon emissions per kg of fruit if more is imported
 - Higher water footprint if more is imported



How to find British – social posts

 **Great British Apples**
February 4 · 🌐

🇬🇧 🍏 🍏 Think British apples and pears are hard to find? They're often right there on the shelf 🍏 🍏 🇬🇧

We often hear shoppers say they cannot find British apples and pears, even when availability is strong. The good news is they are usually closer than you think. Here's how to spot them quickly:

Step 1: Look for the Union Jack 🇬🇧
Check packaging and shelf displays for the Union Jack. Many supermarkets use it to highlight British apples and pears.

Step 2: Check the white box 📦
Look at the white information box on the packet. This shows the variety and where the apples or pears were grown. Even without a Union Jack, this confirms they are British.

Step 3: Ask the fresh produce manager 🗣️
If you cannot see them straight away, ask the fresh produce manager. British apples and pears are often in store, just not always obvious at first glance.

Step 4: Keep asking 🗣️
If you still cannot spot them, ask the store manager. British fruit can sell out quickly and be replenished regularly, so it is always worth checking again.

Tag your retailer in the comments 🛒
Let them know you are choosing British apples and pears.

A quick check can make all the difference. Choosing British supports local growers and helps keep British apples and pears firmly on our supermarket shelves. 🍏 🍏
[#BritishApples](#) [#BritishPears](#) [#ChooseBritish](#) [#BackBritishFarming](#)



Tesco, Sainsbury's, Aldi, Lidl, Waitrose confirmed – please join in!





Season Launch Award



A reminder

Launched in August 2025 to celebrate the most **impactful, creative and effective campaigns** that support the start of the British apple and pear season (September to November).

Judging criteria

- Campaign creativity and innovation (20%)
- Execution quality (20%)
- Impact – sales, plus customer and social media reach (40%)
- Support for British growers (20%)

Entries received from

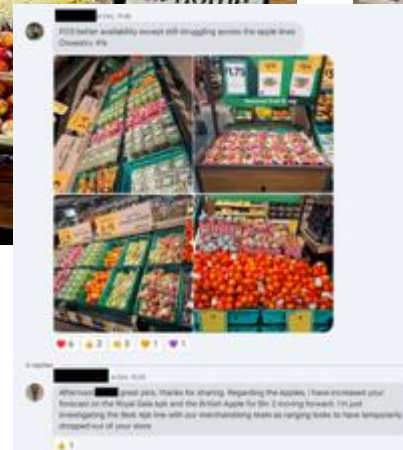
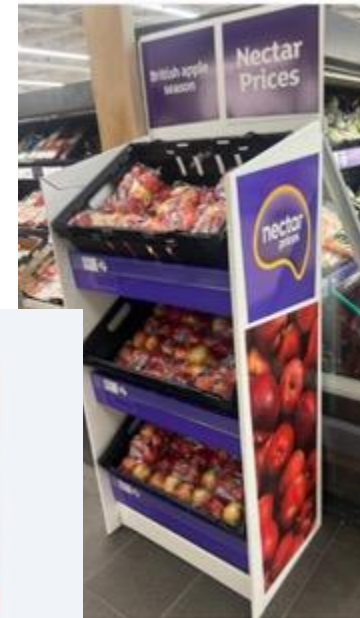
- Booths
- Lidl
- Morrisons
- Ocado
- Sainsbury's
- Waitrose

A judging panel of growers, marketers and The Grocer evaluated all the entries against the criteria to decide on a winner.



What impressed the judges

- Variety of approaches – in-store theatre, social media, promotions
- Strong staff engagement – at head offices and in store
- Support for growers - selected profiles and features
- Educational elements for consumers – know your apples and pears



The winner is ...

Thanks to:

Grace Duncan,
Fresh Food Editor

Kevin White,
International Trade Editor

The Grocer



BRITISH APPLES & PEARS BEST SEASON LAUNCH 2025

AWARDED TO LIDL



Presented March 2026



Ali Capper, Executive Chair,
British Apples & Pears Limited

March 2026

Date



Thank you for your engagement and interest

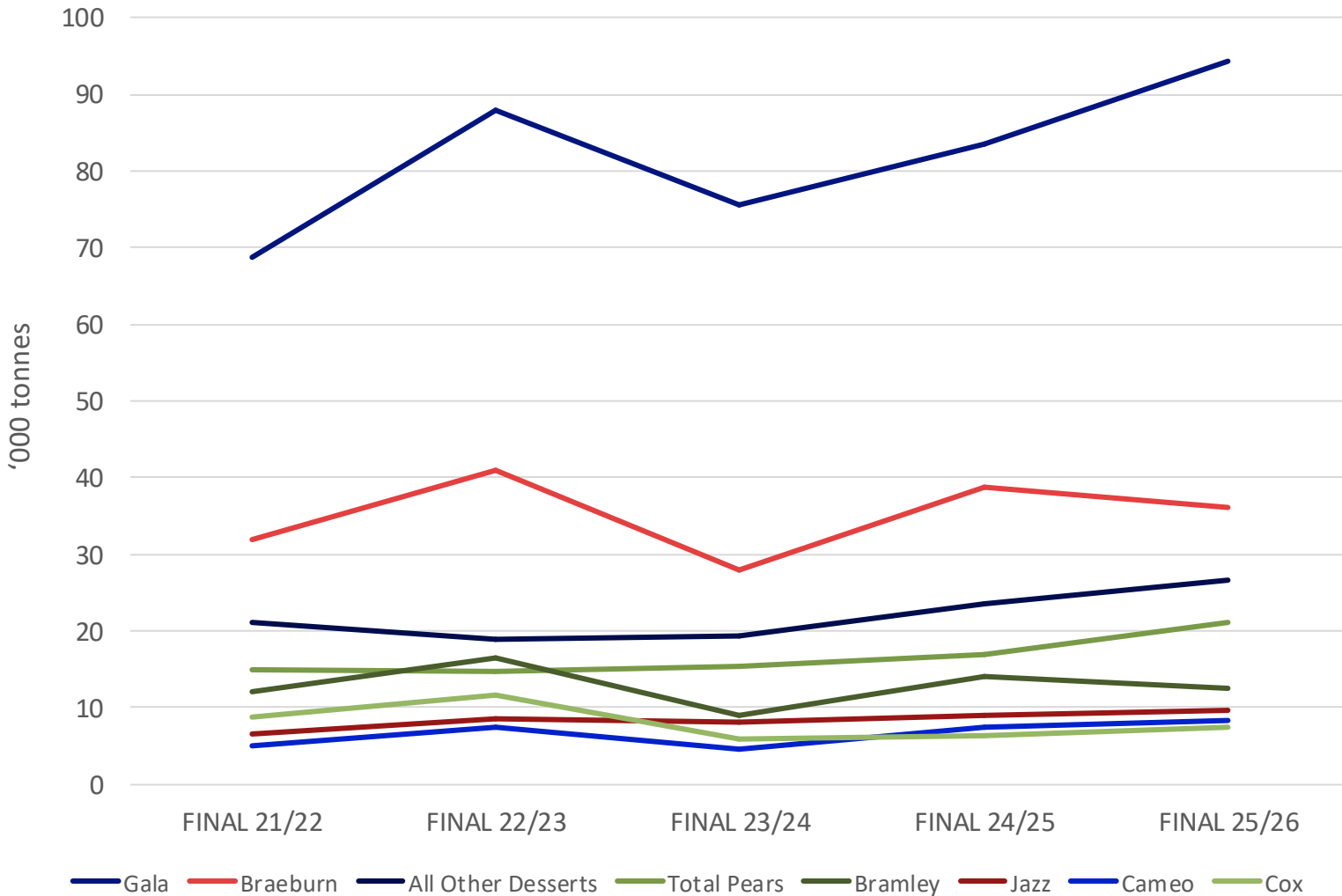


Images from retailer orchard event in September 2025

Recent sales and market share



Total British picked crop 2021-2025



Variety	Final 21/22	Final 22/23	Final 23/24	Final 24/25	Final 25/26
Gala	68.8	87.9	75.6	83.6	94.4
Braeburn	31.9	40.9	28.0	38.7	36.0
All Other Desserts*	21.2	18.8	19.3	23.5	26.5
Total Pears	14.9	14.6	15.4	17.0	21.1
Bramley	12.1	16.5	8.9	14.1	12.6
Jazz	6.5	8.6	8.0	9.0	9.6
Cameo	5.1	7.4	4.6	7.5	8.3
Cox	8.8	11.5	5.9	6.4	7.5
TOTAL	169.3	206.2	165.7	199.8	216.0

*Breakdown on next slide

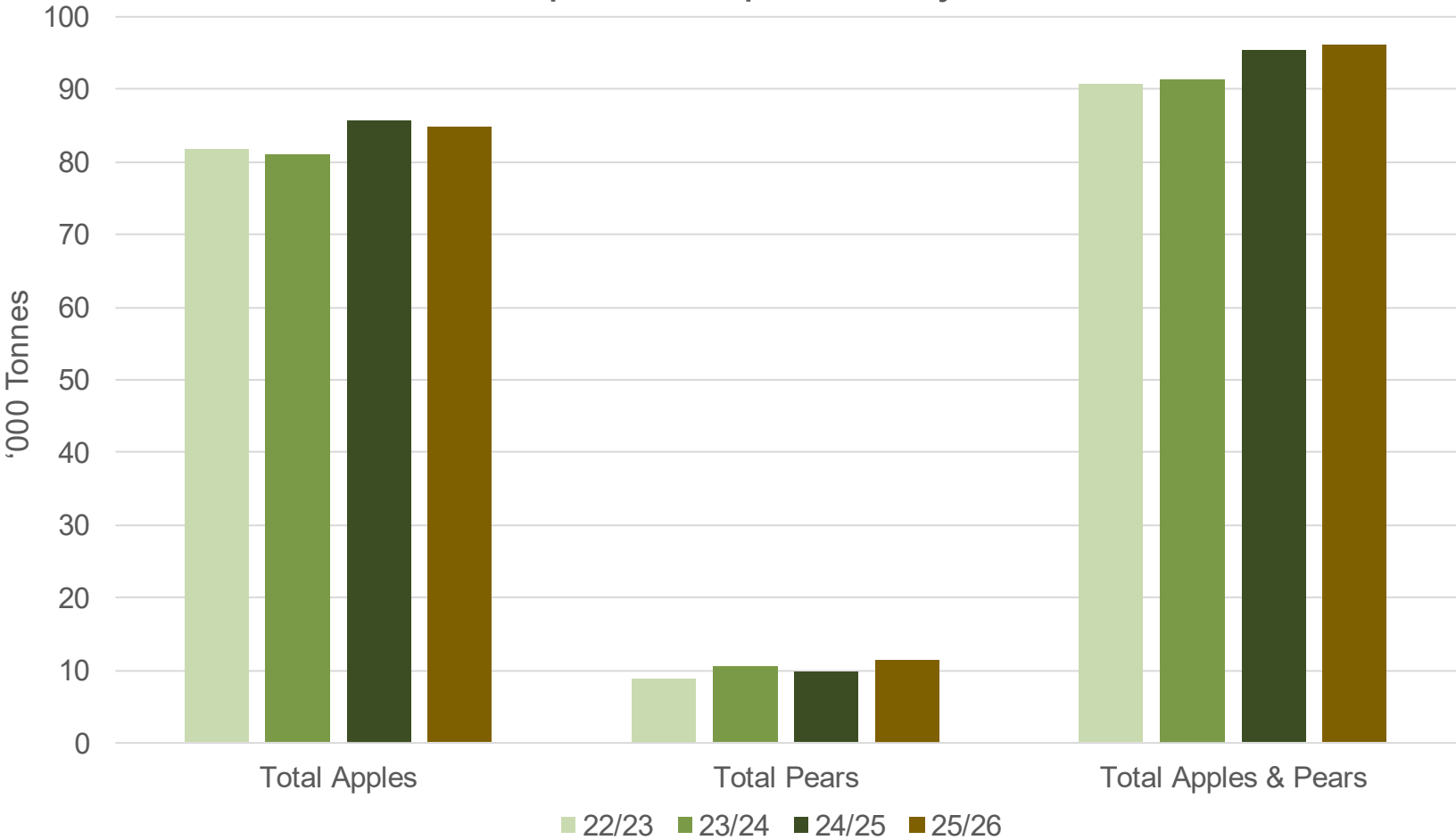




Class 1 sales
Season review to date

Total British apple and pear sales

6 month period September 2025 to February 2026
v same period in previous years



Variety	22/23	23/24	24/25	25/26
Total Apples	81.8	81.1	85.7	84.8
Total Pears	8.8	10.4	9.7	11.4
Total Apples & Pears	90.6	91.5	95.4	96.2





Retailer sales and market share data
2025 crop
(6 months)

Retailer market share – British apples and pears sales to multiples

Multiple	22/23	% of total	23/24	% of total	24/25	% of total	25/26	% of total	Total Grocery Market Share*
Aldi	18.4	20.3%	17.6	19.1%	18.0	18.8%	18.2	18.9%	10.1%
Asda	4.2	4.6%	4.1	4.5%	8.1	8.5%	8.1	8.4%	11.5%
Co-op	4.2	4.6%	3.6	3.9%	2.6	2.7%	3.1	3.2%	5.0%
Iceland	0.8	0.9%	0.6	0.7%	0.8	0.8%	0.2	0.2%	2.3%
Lidl	13.3	14.7%	15.1	16.5%	15.6	16.4%	17.6	18.3%	7.8%
M&S	3.8	4.2%	4.7	5.1%	5.1	5.4%	3.9	4.1%	3.9%**
Morrisons	6.1	6.7%	4.0	4.4%	3.4	3.6%	3.8	4.0%	8.4%
Ocado	-	-	-	-	-	-	1.7	1.8%	2.1%
Sainsburys	14.4	15.9%	17.2	18.8%	17.2	18.0%	15.4	16.0%	16.1%
Tesco	19.0	21.0%	17.8	19.4%	18.1	19.0%	18.8	19.6%	28.5%
Waitrose	5.0	5.5%	4.8	5.2%	5.2	5.5%	4.8	5.0%	4.8%
Others****	1.4	1.6%	2.2	2.4%	1.2	1.3%	0.5	0.5%	3.3%***
Total	90.6	100%	91.7	100%	95.3	100%	96.1	100%	103.8%

Sales to multiples ('000 tonnes): 6 months September 2025 to February 2026 v previous years

*Kantar data - 12 weeks ending 22/02/2026

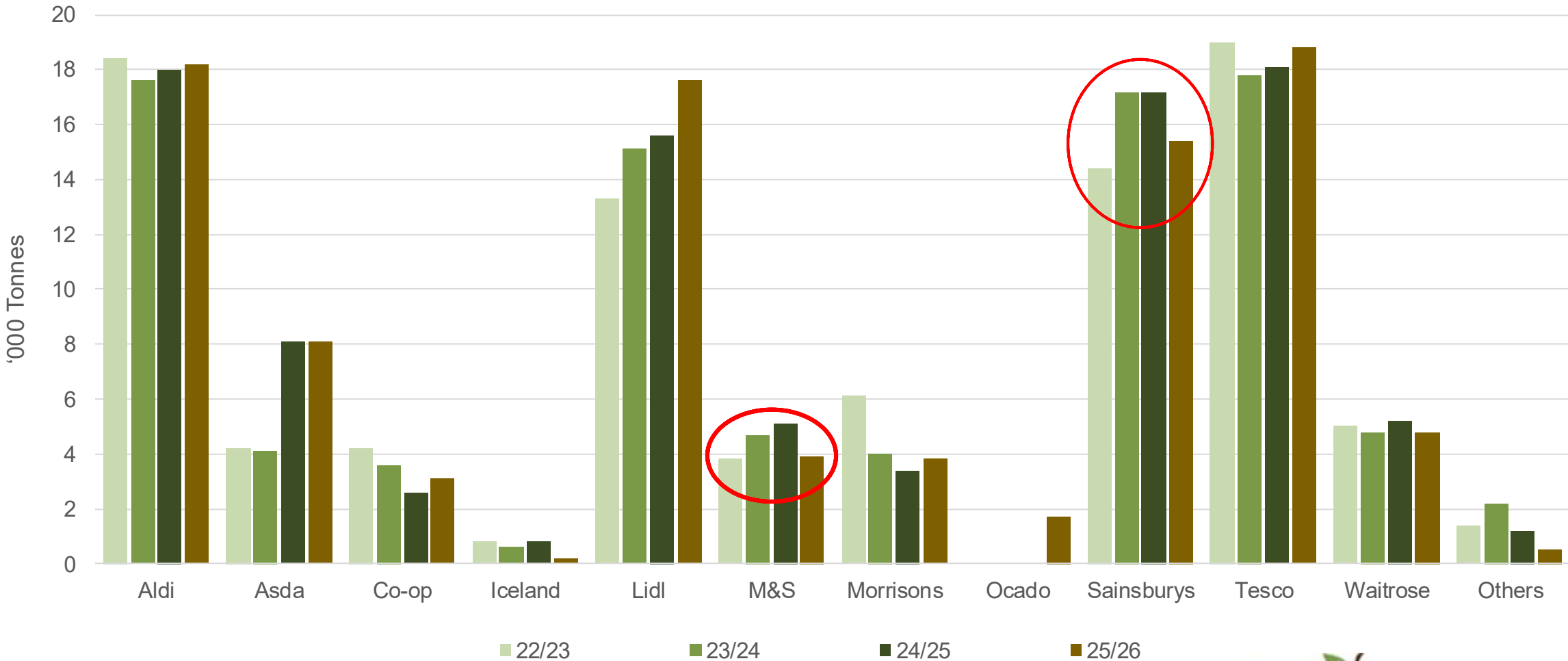
** <https://corporate.marksandspencer.com/about-us/key-facts-figures> – year ending 29/03/2025

***Symbols & Independent, Other Outlets

****Includes Ocado up to 24/25



Retailer market share – British apples and pears sales to multiples

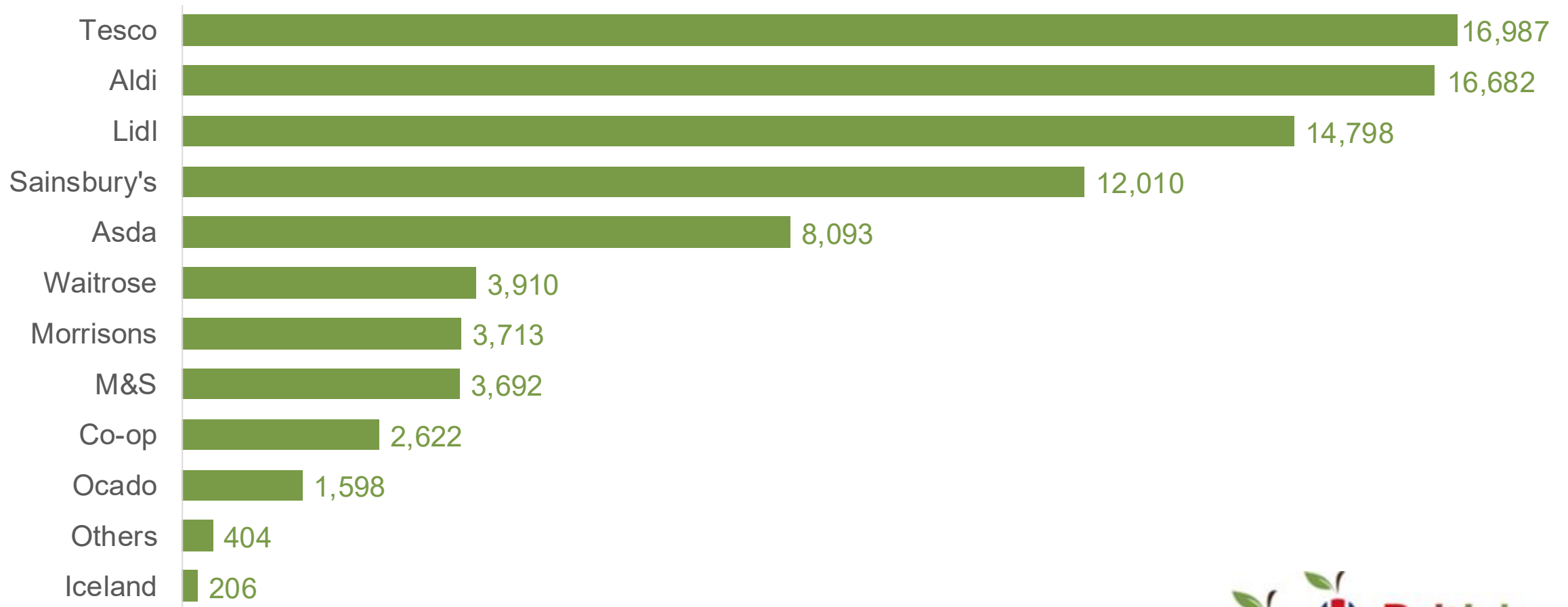


Sales to multiples: 6 months September 2025 to February 2026 v previous years



Current league tables – six months in

BRITISH APPLES

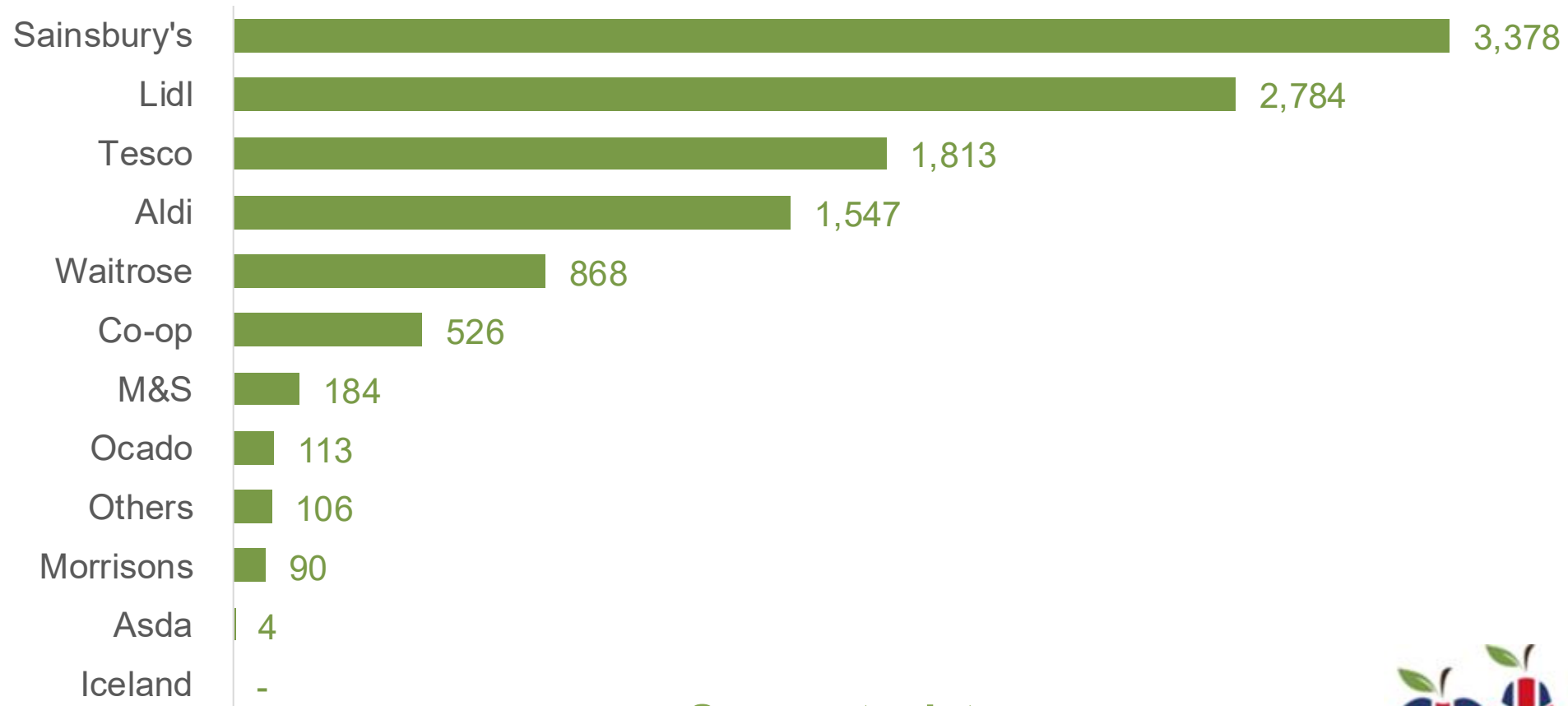


Season to date
Sep 2025 to Feb 2026



Current league tables – six months in

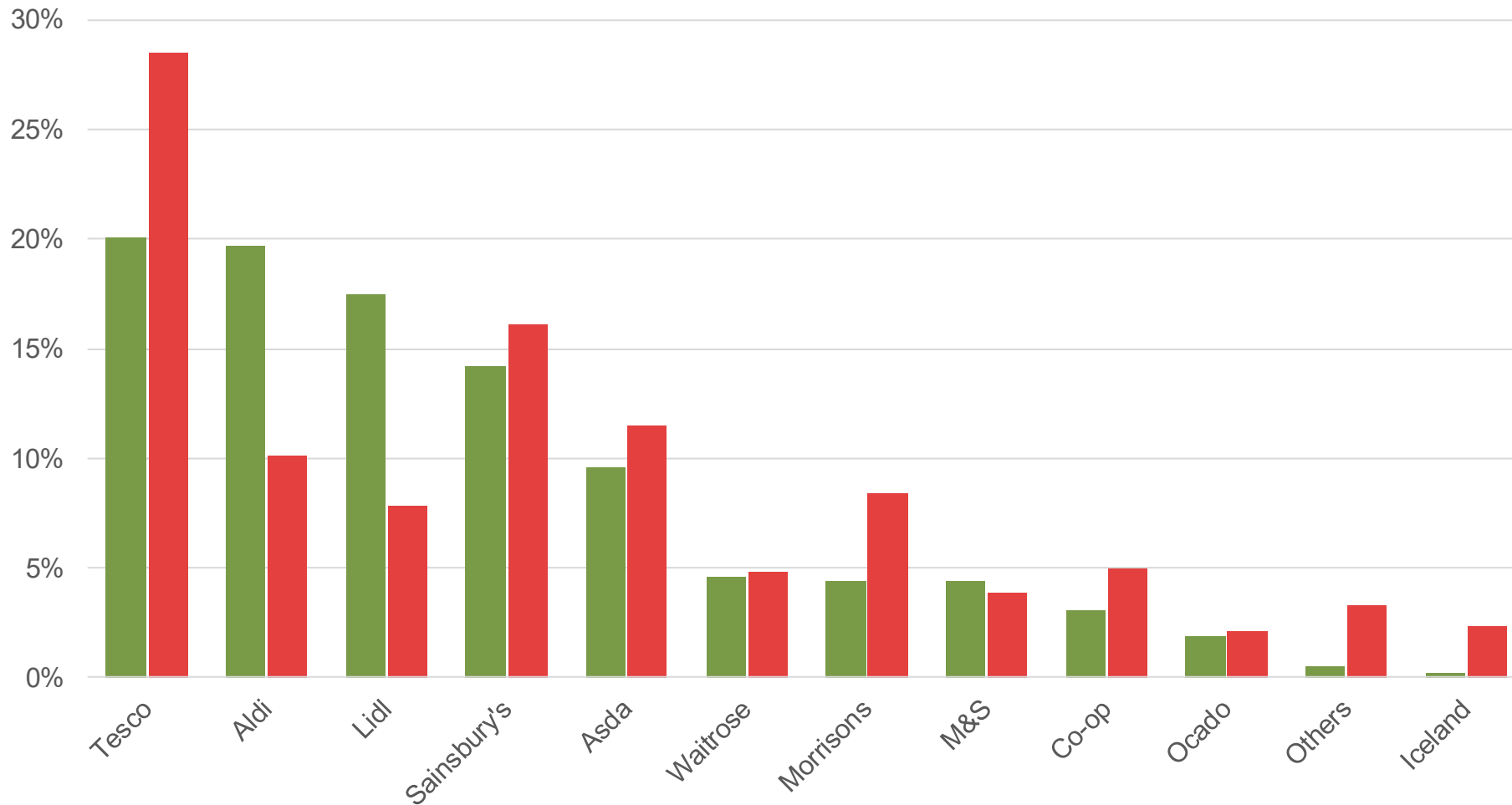
BRITISH PEARS



Season to date
Sep 2025 to Feb 2026



Apple supermarket share



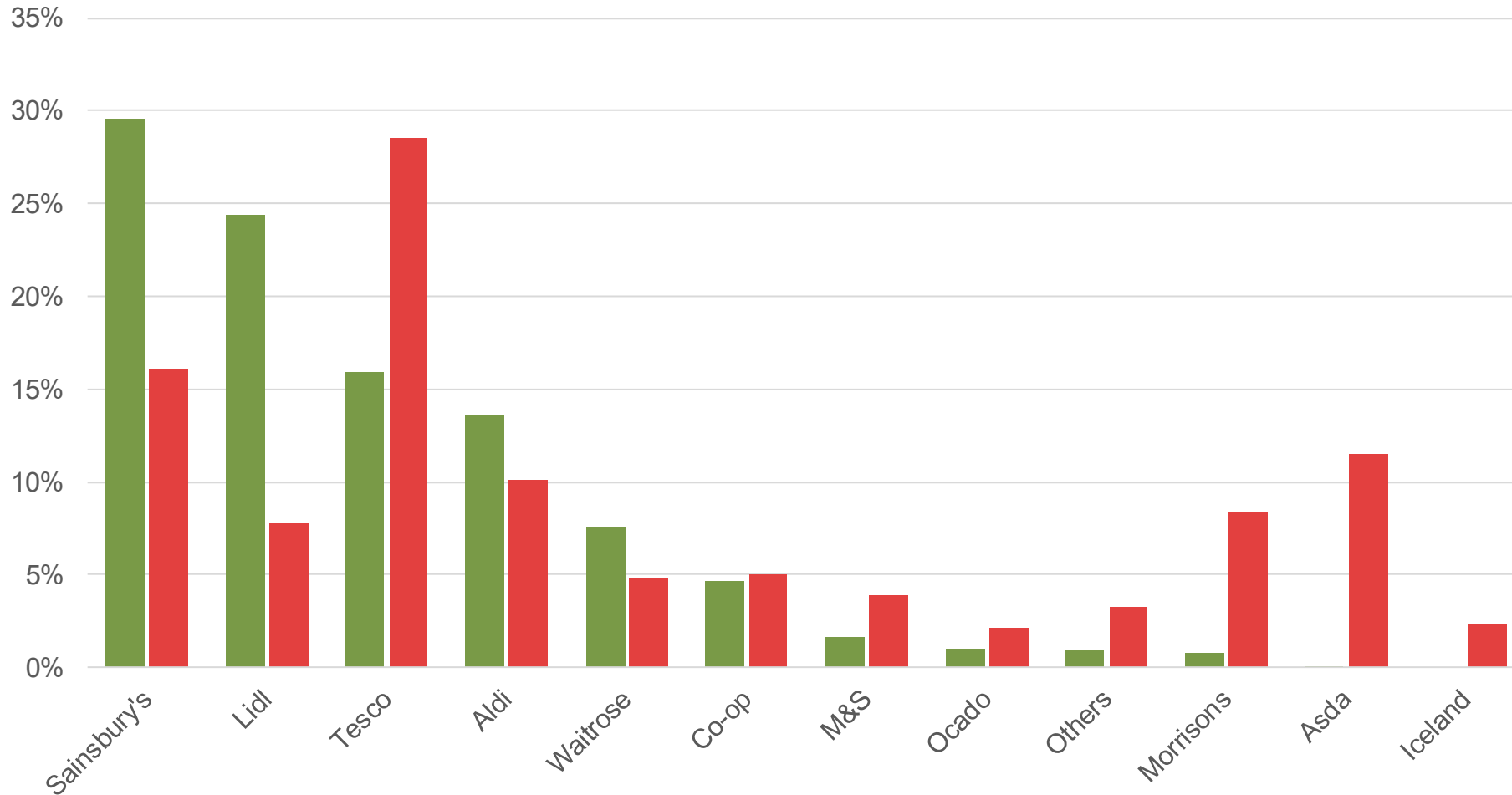
Season to date
Sep 2025 to Feb 2026

■ Share of British apple sales
■ Grocery market share



Total Grocery Market Share figure represents 12 weeks ending 22/02/26 (kantarc.com). M&S market share from M&S financial statements.

Pear supermarket share



Season to date
Sep 2025 to Feb 2026

■ Share of British pear sales
■ Grocery market share



Total Grocery Market Share figure represents 12 weeks ending 22/02/26 (kantarc.com). M&S market share from M&S financial statements.

To come in 2026



More social media

2025 RESULTS

Reach	Spend	Reach per £
8 million	£34.8k	178 Up 29% on 2024

Excluding start of season retailer ads

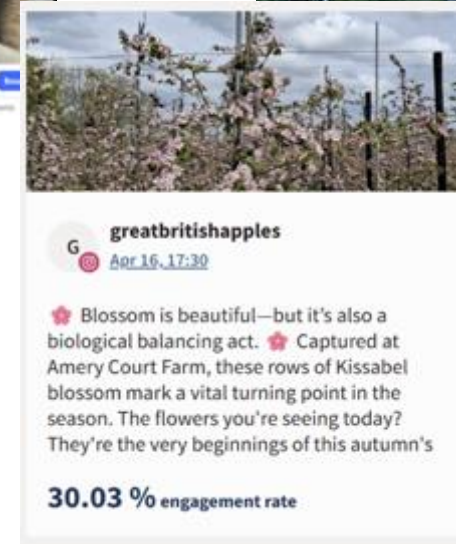
MESSAGING

General posts (34%)

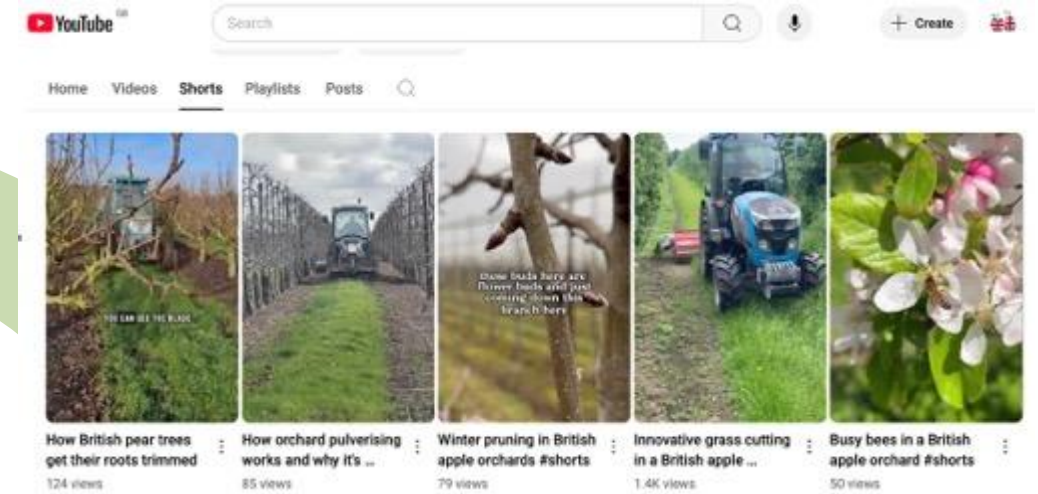
- Health
- Back British
- Value
- Recipes
- Retailers

Orchard Watch posts (66%)

- Nature and biodiversity
- Harvest
- Tree care, thinning, pruning
- Tech, innovation
- Planting, grubbing



More website, YouTube and TikTok integration



Started in June 2025, YouTube integration is going well.

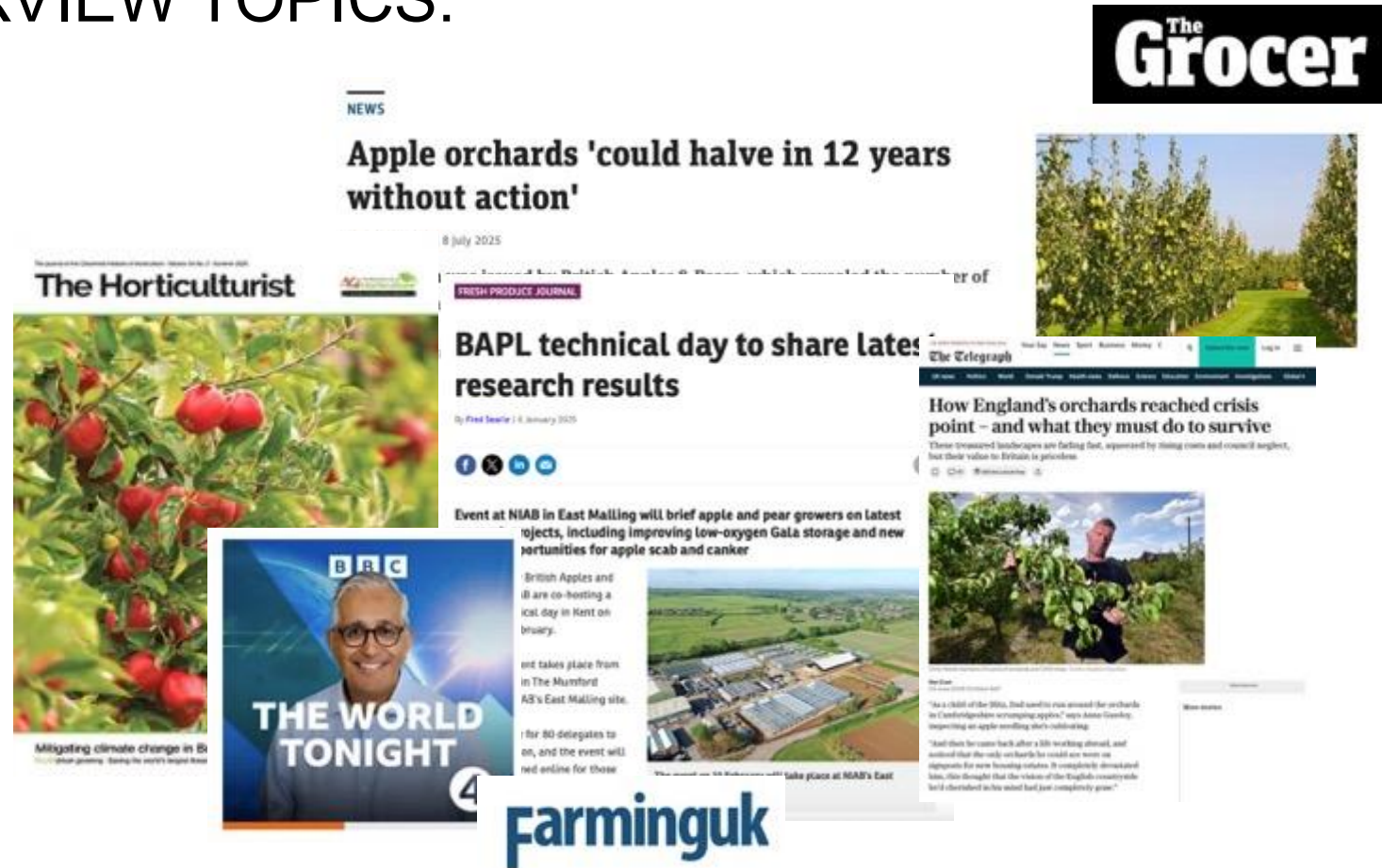


Media coverage

PRESS RELEASE AND INTERVIEW TOPICS:

- Retailer apple and pear sales
- Labour costs
- BAPL retailer webinar
- Orchard and storage census
- Crop forecast
- Forum for the Future report
- Oxbury partnership
- BAPL technical day
- Climate change

+ Bi-monthly Fruit Grower column



Our orchard event

LAST YEAR

ATTENDEES (96 – up from 55 in 2024)

- All major supermarkets
- Board and Prom Comm
- NFU
- Local MP
- Media

SAVE THE DATE FOR 2026

WEDNESDAY 16TH SEPTEMBER 2026

The Night Yard

Highland Court Farm

Bridge (just south of Canterbury)

CT4 5HW

2026 kindly hosted by Greosn and Mansfields



Retailer of the year

- Trade media coverage throughout the year about our monthly sales data
- Awards given at orchard event
- Media coverage generated



Start of season retailer social media ads

BACK BRITISH FARMING



Great British Apples and Asda ... X
Sponsored · 🇬🇧

Have you spotted our British apples at your local Asda? 🇬🇧🍏 The British maritime climate is perfect for growing apples bursting with flavour. By choosing British, you're supporting local growers who nurture our land, champion biodiversity, and lead the way in sustainability. This October, we'll be hand-picking 22 million apples every day, and the first British apples of the season are already in store at Asda! Every delicious bite fuels the heartbeat of our countryside and strengthens our economy. 🇬🇧🍏

#BackBritishFarming

britishapplesandpears.co.uk/...
British apples: world's best? [Learn more](#)

ASDA example

DIRECTING SHOPPERS TO FIND BRITISH PACKS IN STORE WITH IMAGES OF THAT RETAILER'S PACKS

We repeated the successful messaging from 2024.

SUPERFOOD



Great British Apples and Asda ... X
Sponsored · 🇬🇧

Step aside, avocados—there's a new home-grown superfood taking the spotlight! 🍏🇬🇧 Have you spotted our new season British apples at your local Asda? Bursting with heart-healthy goodness, cholesterol-reducing fibre, natural hydration, and flavonoid power, they're the hidden superfood you won't want to miss. Packed with unbeatable value, these gems are perfect for snacking, lunchboxes, and on-the-go bites. Grab them now at Asda! 🇬🇧🍏

#AnAppleADay #SnackingPerfection

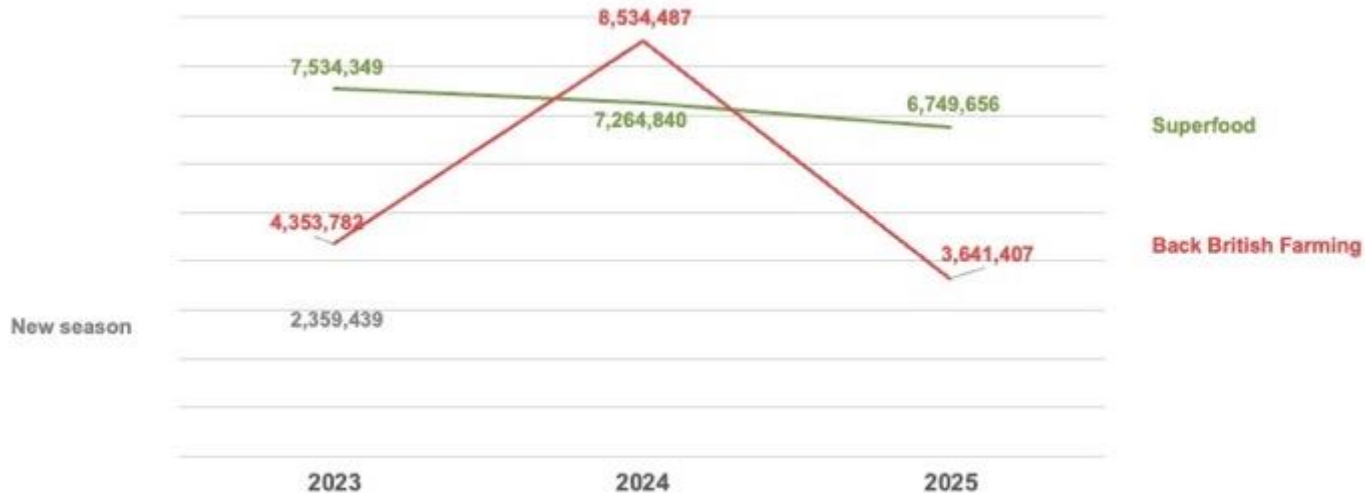
britishapples.co.uk/superfood
Are apples a superfood? British Apples the 'new' s... [Learn more](#)



Result trends over time and plan for 2026

- Superfood/health messaging performed well
- Back British Farming performed in line with 2023 (2024 higher performance was an outlier)

2025 campaign reach



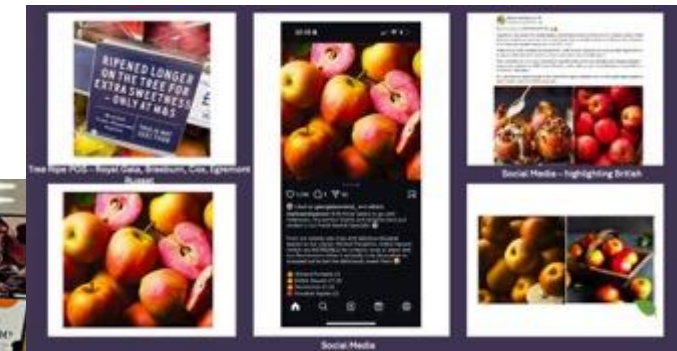
PLAN FOR 2026

- Same spend
- 'Whole food' and 'UPF' messaging alongside health and back British
- More pack (and lifestyle) images to drive extended engagement



How you can help

- ✓ TV and print advertising support
- ✓ Best aisle-end support for British apples and pears
- ✓ **British/Union Jack focus in store** – point-of-sale, packs and online
- ✓ Apple sampling in-store
- ✓ Life-size posters of UK apple growers facing checkouts in all stores
- ✓ Clear 'British apple' visibility for online shoppers across all varieties
- ✓ Promotion for British apples/amplification of BAPL social posts
- ✓ Target to exceed share of British apple sales vs grocery market share



What we said last year ...

The issues – in some retailers...

- Southern hemisphere overhang!!
- Where are the union jacks?

The plan - in all retailers...

- Sales start in September
- Create in-store theatre – invest in British, union jacks, POS, packaging
- Direct consumers to British packs online and instore



THE MESSAGE REMAINS THE SAME!



R&D update

Funded by growers and government

- c. £200k Innovate UK/ADOPT awards
- c. £350k BAPL-grower funded research projects and EAMU and EA access via HCP Ltd

Completed research

- **9 completed pest and disease research projects** with practical application for growers (canker, scab, codling moth, woodlice, sawfly, etc)

Future research

5 strategic themes for future research:

- Resilient crop protection
- Climate adaptation
- Profitable productivity
- Market differentiation
- Environmentally positive production



Knowledge sharing at the R&D Technical Day | February 2026

Want to get involved? Get in touch

Visit BAPL website for more details and completed project fact sheets



Grower insights and Q&A



Today's panel



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