



FRESHO

FRESHO UK FRUIT AND VEG REPORT 2025

An industry look at wholesaler
trends and order patterns

INTRODUCTION

Welcome to the first edition of Fresho's UK Fruit and Veg Report! This annual report provides a snapshot of the UK fruit and veg industry by breaking down key trends, challenges, and opportunities for wholesalers in 2025.

While we often see news stories and data-filled reports about farm production and venue performance in the hospitality industry, the critical role of wholesalers can remain in the shadows. This is why we created a yearly report to shine a light on this vital link in the supply chain, offering unprecedented visibility into the wholesale sector that connects producers with venues across the UK.

This report is based on anonymous data collected in December 2024 through the Fresho platform. We've enriched these insights with valuable perspectives from local wholesalers and chefs who generously shared their time and expertise. By combining our data with industry insights, this report shows the landscape of fresh produce in the UK's hospitality industry, to help inform decision making in 2025.



Huw Birrell

Co-Founder, Finance & Strategy Director
@ Fresho

INSIGHTS FROM:



EXECUTIVE SUMMARY

The UK's fruit and veg wholesale industry has remained resilient over the past three years, despite ongoing rising business costs. Anonymous data from this report shows an industry adapting to big challenges, such as Brexit and imminent National Insurance increases, with innovation and hard work. However considerable supply chain cost pressures remain.

This comes at a time when restaurants and suppliers are dealing with higher operational costs, from wages to utilities, making operational efficiency critical to maintaining margins. This impact is evident in ordering patterns, with average lines per order declining over the past few years, suggesting more strategic purchasing decisions by venues.

The withdrawal of COVID-era government support has led to business closures in the hospitality sector, creating new challenges for wholesalers around customer credit risk and bad debt. On top of this, the labour-intensive nature of the wholesale business makes staffing a persistent challenge.

The industry is also managing significant supply chain challenges. According to data from Defra, UK vegetable production declined 4.9% to 2.2 million tonnes and fruit production dropped 12% to 585,000 tonnes in 2023. This has resulted in heavy reliance on imports, which now account for 47% of vegetables and 84% of fruit in the UK market.

Looking ahead to 2025, businesses are adapting through:

- Strategic purchasing to manage costs
- Increased adoption of technology to improve efficiency
- Growing demand for prepared items to reduce labour dependency
- More careful management of customer credit risk

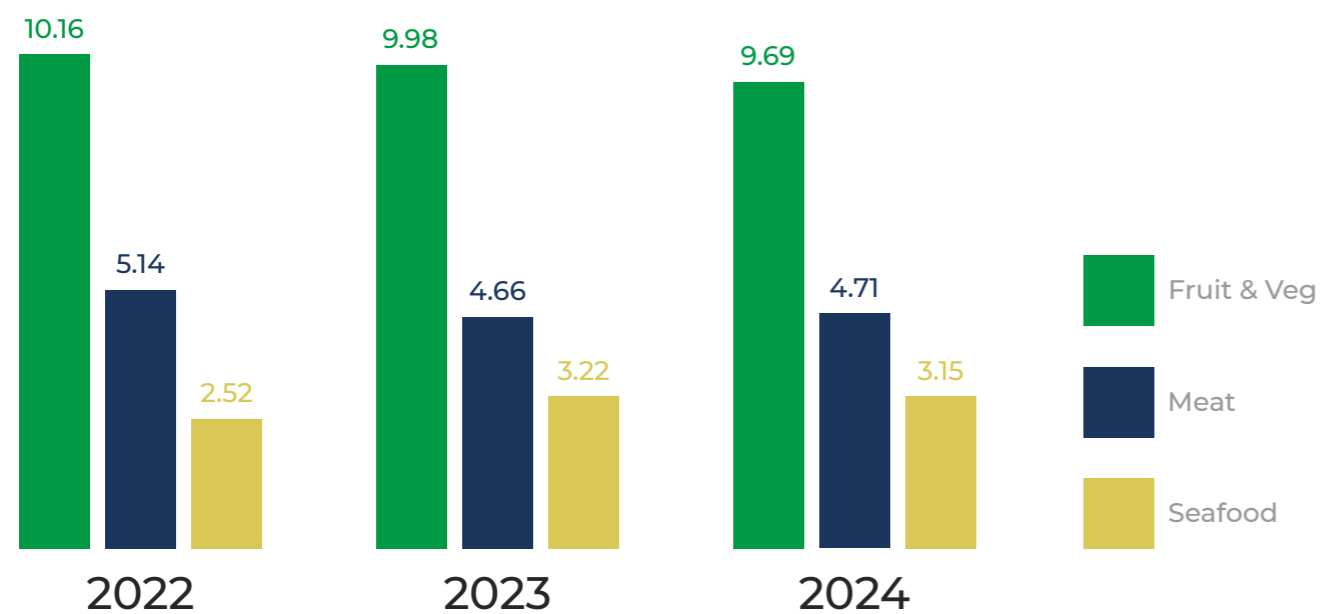
Despite these pressures, the sector's growth trajectory remains positive, with greater technology adoption helping control costs while maintaining service levels. This report shows the current fruit and veg landscape so businesses can position themselves for stability and growth even in challenging economic environments.

ORDER PATTERNS AND CUSTOMER BEHAVIOUR

The average number of lines per order has consistently declined across all categories, with fruit and veg orders decreasing from 10.31 lines in 2021 to 9.69 lines in 2024. This reduction in order complexity suggests that customers are streamlining their purchasing decisions, likely in response to cost pressures and operational efficiency needs.

FRUIT & VEG, MEAT AND SEAFOOD

Average lines per order



“Costs, whether you're a restaurant or a supplier, are going up so keeping visibility and control over margins is more and more important.”

Huw Birrell, Co-Founder @ Fresho



INSIGHTS FROM THE INDUSTRY

fisherandwoods
SUPPLIERS OF FINE FRESH PRODUCE

“There’s an interesting dichotomy in the market. While some customers want pre-packaged products for value, others are rejecting extra packaging entirely. Chefs are increasingly conscious of their environmental impact and prefer reusable options over cardboard boxes.”

Kevin Stanbridge, Sales Director @ Fisher & Woods

For fruit and veg wholesalers like **Fisher and Woods**, price sensitivity and sustainability concerns are creating new tensions in product offerings. While some venues seek pre-packaged products for value, others are actively reducing packaging for environmental reasons. Fisher and Woods say more venues are prioritising paper bags and reusable containers, reflecting the industry’s broader sustainability goals.

For Fisher and Woods, the trend toward becoming a ‘one-stop shop’ has driven product diversification. The wholesaler has expanded beyond fresh produce to include approximately 3,500 products, including ready-made desserts – a response to the industry’s shortage of pastry chefs.

In 2025, Fisher and Woods’ focus will be on deepening relationships with existing customers. The impact of National Insurance increases and minimum wage rises presents significant challenges, with some customers already seeking price reductions in anticipation of cost pressures.

FRESHO

PRODUCT PREFERENCES AND ORDERING TRENDS

Cucumber has maintained its position as the most frequently ordered item by line count from 2022 to 2024, followed consistently by lemons and bananas.

The quantity-based analysis shows a different pattern, with citrus fruits dominating the volume rankings. Lemons and limes have consistently held the top positions since 2022, reflecting their essential role in food and drink service. In 2024, Royal Gala apples entered the top rankings for the first time while staple items like bananas and cucumbers remain popular.

Milk is always in the top products list for fruit and vegetable suppliers. This shows an opportunity for suppliers to expand their offering into everyday essentials like dairy and bakery items, potentially creating new revenue streams and meeting customers' desires for consolidated ordering.

Top 10 products 2022-2024

Count of lines

	2022	2023	2024
1	Cucumber – each	Cucumber – each	Coriander – bunch
2	Lemons – each	Lemons – each	Parsley, continental – bunch
3	Bananas – kg	Bananas – kg	Basil – bunch
4	Onions, red – kg	Carrots – kg	Cucumber, continental – each
5	Milk, semi skimmed – each (2L)	Onions, red – kg	Lemons – kg
6	Limes – each	Lettuce, iceberg – each	Capsicums, red – kg
7	Carrots – kg	Limes – each	Mint – bunch
8	Lettuce, iceberg – each	Milk, semi skimmed – each (2L)	Spring onions – bunch
9	Cauliflower – each	Celery – each	Bananas – kg
10	Celery – each	Spring onions – bunch	Avocados – tray

Sum of quantity

	2022	2023	2024
1	Lemons – each	Lemons – each	Lemons – each
2	Lemons – each	Limes – each	Limes – each
3	Bananas – kg	Cucumber – each	Cucumber – each
4	Cucumber – each	Satsumas – each	Bananas – each
5	Milk, semi skimmed – each (2L)	Milk, semi skimmed – each (2L)	Apples, Royal Gala – each
6	Bananas – kg	Bananas – each	Bananas – kg
7	Satsumas – each	Bananas – kg	Carrots – kg
8	Cauliflower – each	Lettuce, iceberg – each	Satsumas – each
9	Milk, whole fresh – each (2L)	Carrots – kg	Milk, semi skimmed – each (2L)
10	Milk, full fat – each (2L)	Cauliflower – each	Lettuce, iceberg – each

INSIGHTS FROM THE INDUSTRY



“Many of our customers are moving to third-party ordering platforms to better manage their procurement processes. This has led to a significant increase in email orders over telephone orders, with over 50% now placed electronically.”

Matt Gummer, Owner @ Zest Food Service Ltd

Fresh produce wholesaler **Zest Food Service** has prepared more orders with different items in 2024, suggesting venues are consolidating their purchasing through preferred suppliers. Technology has had a significant impact on how wholesalers are receiving orders.

The wholesaler has observed several trends: a growing demand for vegan products, increased interest in frozen vegetables (particularly chips amid high potato and cooking oil costs), and rising sales of fresh herbs.

They've also noted growing integration of international ingredients into traditional British restaurants, reflecting evolving consumer preferences.

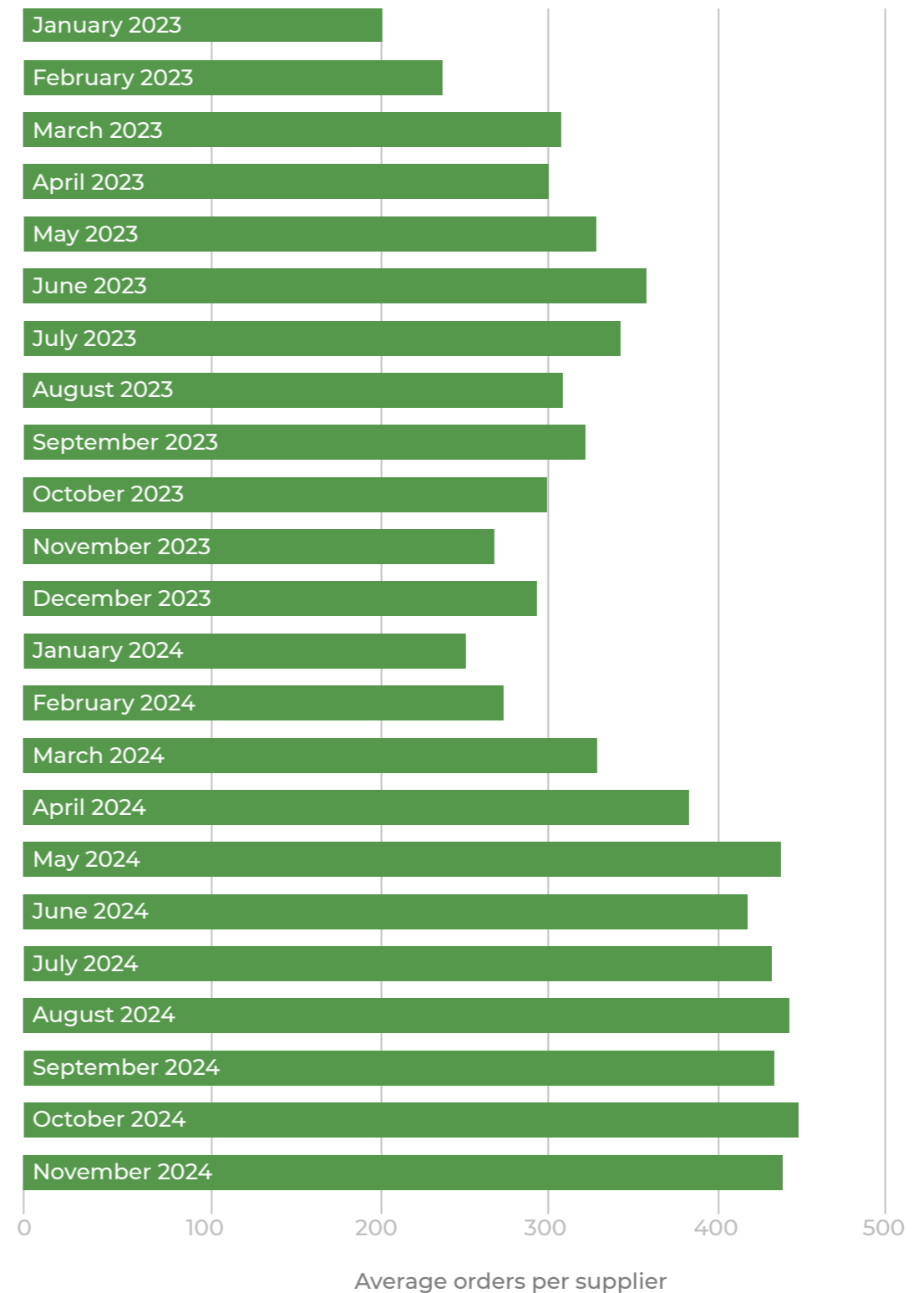
PREPARED AND VALUE ADDED SERVICES

A significant trend emerging from the data is the increase in orders containing prepared items (cut, diced, peeled, or shredded products). The average number of orders with prepared items has grown substantially, rising from an average of 308 orders per supplier in 2023 to almost 400 average orders per supplier by 2024 – an increase of 29.9%.

The trend toward prepared items reflects broader industry challenges:

- Labour shortages making kitchen preparation more costly
- Rising wage costs driving the need for efficiency
- Operational pressures pushing businesses to seek time-saving solutions
- Growing demand for convenience without compromising quality

Average number of orders per supplier with prepared items by month



INSIGHTS FROM THE INDUSTRY



“We are seeing increased demand for wellness-focused options and ‘greener’ dishes, with more people conscious of leading healthier lifestyles. This has led to more lunch and brunch offerings and menus shifting to include more plant-based and healthy options.”

Venues are in the business of listening to their customers. **Craig Rogan, Executive Head Chef at Herd Steakhouse** talks about how menus are adapting to consumer preferences across the UK.

The industry faces both the pressures of rising costs and staffing challenges. Rather than passing these costs directly

to customers, venues are finding creative solutions to engineer menus and reduce waste. This includes adjusting operating hours to match peak dining times and implementing zero-waste practices to maximise ingredient usage.

Looking ahead, Rogan anticipates a return to simpler, nostalgic menu offerings alongside continued technology adoption. However, concerns about business rates and VAT remain significant hurdles for the industry’s recovery. Ordering processes reflect the broader digital transformation in hospitality, with more suppliers offering online ordering options. However, for Rogan and the UK’s other leading chefs, the fundamentals of fresh produce ordering remain unchanged, with daily orders still necessary to maintain quality standards.

CONCLUSION

The UK fruit and veg wholesale sector is showing real resilience and adaptability in the face of significant challenges. While dealing with reduced domestic production, increased import reliance, and ongoing cost pressures, the industry continues to grow.

The data from this report reveals an industry focusing on efficiency and adaptation:

- Strong supplier base growth with increasing GMV
- Streamlined ordering patterns reflecting cost consciousness
- Growing popularity of prepared products
- Diversification into adjacent product categories

Looking ahead, those who can balance cost management with innovation and service quality will be best positioned for success.

ABOUT FRESHO

Fresho is a global order management platform that brings fresh food wholesalers closer to their customers.

With our industry background, we know that order processing can be stressful, time-consuming, expensive and error-prone.

We solve the significant problem of receiving orders through an increasing number of channels so you achieve on-time, in-full deliveries, with clear and timely customer communication.

By removing the daily noise, we give you time to focus on your customer relationships, the health of your business, and the important things in life.

Email us at
hello@fresho.com



fresho.com