

Consumption trends show that although the red segment continues to be the largest, white grapes are narrowing the gap

to gain share, and loyalty schemes have become central to perceived value. Yet grapes have demonstrated notable stability. This indicates that, although price sensitivity exists, grapes retain a strong position within the fruit basket.

At the same time, premium ranges within mainstream retailers were among the fastest-growing segments. As Fröhlich observed, some shoppers are willing to pay a premium when quality expectations are met. The relationship between price and demand shifts when the eating experience delivers. In his words, the short message is simple: quality sells.

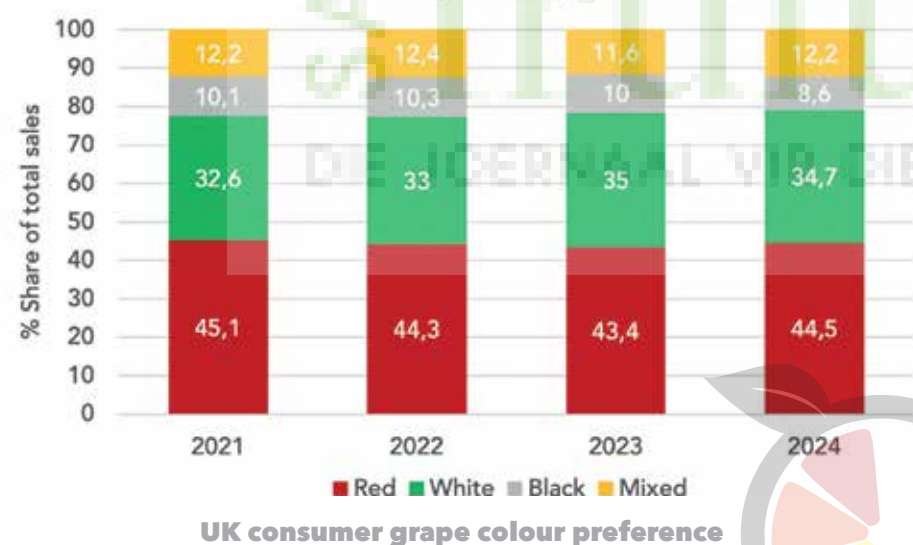
What actually drives purchase

Consumer research highlights that UK shoppers prioritise eating quality and visual appeal over origin or varietal detail. The most important purchase attributes are:

- attractive colour
- absence of blemishes
- firmness and texture
- seedlessness
- flavour.

Visually, shoppers focus on full colour, the absence of blemishes and firmness – with the latter also becoming increasingly important. By contrast, country of origin and specific variety rank significantly lower in importance underscoring the fact that most consumers engage with grapes at a sensory rather than technical level.

A poor eating experience can lead to a six- to eight-week lapse before a shopper re-enters the category. In some cases, regaining that customer can take considerably longer. Inconsistent quality does not simply affect a single transaction; it can suppress category performance over time. For seasonal exporters supplying



within defined windows, this dynamic carries particular relevance.

Consistency, therefore, is not merely a competitive advantage but a defensive requirement.

For SA, the UK remains a critical counter-seasonal market and while SA remains a key supplier, Chile's volumes are declining. But India is becoming more competitive, and Namibia is emerging strongly with earlier, improved varieties.

As competitive pressure intensifies, it reinforces the need for precision in varietal selection, post-harvest handling and supply chain reliability.

In 2026, the UK table-grape market reflects broader patterns within fresh fruit

retail: consumers are financially cautious yet unwilling to compromise on eating quality. Grapes have retained volume stability despite price increases, supported by strong penetration and continued snacking relevance. Growth is unlikely to come from radical change. Instead, it will be driven by incremental gains in consistency and the sustained expansion of premium tiers. In a mature, highly competitive market the defining differentiator is not simply availability or price. It is the reliable delivery of a satisfying eating experience – week after week, season after season.



"Food Safety" as a mechanism to drive FREXIT

The bias of the EU towards competitiveness of EU farmers.

By Paula Bester and Paul Hardman

Reflecting on an article titled "Is the playing field truly level?" featured in the *SA Fruit Journal* Dec-Jan '26, prioritisation of EU farmers' competitiveness in the EU's Vision for Agriculture and Food is starting to have a material impact on member-state thinking.

On 7 January 2026 the French Ministers of Agriculture and Trade announced that the importation of certain agricultural products from non-EU countries with residues of particular active substances that are no longer approved for use in Europe, will be prohibited in France.¹ This while there are still MRLs (import tolerances) in place for a number of the active substance-crop combinations listed by the French (only certain crops and active substances were targeted in the decree).

The existing import tolerances are based on the European Food Safety Authority (EFSA) scientific consumer risk assessments. Notably, where EFSA has identified possible consumer health risks, the Commission has already proposed to lower the applicable MRLs to the limit of detection (LoD). Despite these on-going scientific and highly complex MRL review processes, France decided to lower their national MRLs for specified active substance-crop combinations to the LoD, fragmenting away from the Union. The decree was said to enter into force a day after its publication, allowing an extremely short "grace period" of only one month. This means that foodstuff that entered the French market on 8 February 2026 will have to comply with the new MRLs in France, or it will be removed from the market and destroyed.

EU law allows for EU member states to implement national emergency measures only when there's an evident and serious risk to human health. These actions by the French government don't seem to align accurately with EFSA's consumer risk assessment conclusions, or the process that the Commission is following.

This French decree was published days before the EU-MERCUSOR trade agreement was voted on, which would enable the largest free trade zone in the world between the EU and Latin-American countries. This agreement was opposed by France, following farmer protests in Paris.²

Scientific evidence is considered when, and to what extent, it suits political intention

EFSA concluded that there are no consumer health risks for some of the MRLs which France has proposed to be lowered to the LoD. From a trade point of view, it's clear that scientific evidence is considered when and to what extent it suits political intentions. On 20 January 2026 discussions took place between the member states and the Commission in an extraordinary SCOPAFF meeting. A decision had to be made regarding a way forward on the remaining positive EU import tolerances where EFSA did not identify consumer

health risks. This places the Commission between a rock (following science-based decision-making) and a hard place (political pressure from member states).

Following the publication of this French decree, Poland indicated that they intend to set their own rules, deviating from the Union's policies and regulations, to protect their own market.³

The status quo creates material uncertainties for trading partners of the EU.



1. Order of 5 January 2026 suspending the importation, introduction and placing on the market, whether free of charge or for payment, in France, of foodstuffs from countries outside the European Union containing residues of certain active plant protection substances prohibited for use in the European Union.



2. EU member states back Mercosur deal, French MEPs vow fight in Parliament.



3. The ban on the import of products containing harmful substances will soon be implemented in Poland as well.

