



Market Review

Winter 2024



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Introduction



By Andy Pembroke

Managing Director, Fresh Direct

Our biannual Market Review for winter 2024 from our expert fresh produce team will provide you with industry-leading category insight from across Fresh Direct as well as key economic data and useful market trends.

This edition features thought provoking articles on foodservice, as well as exciting food trends and innovation from our food development team who work closely with our customers to deliver on-trend, sustainable menu solutions.

The second half of 2024 continues to create significant challenges for our industry with several key macroeconomic factors affecting us all. We continue to experience increasingly frequent and intense weather events

and ongoing global conflict continues to adversely affect supply and the safety of commercial shipping in some regions.

The effects of increasing global weather challenges continue to impact the growing conditions and harvests of many fresh produce categories leading to disruption in quality and availability. Our expert team constantly review our supply chain and work with our suppliers to identify alternative growing regions, focusing on maximising availability and maintaining product quality.

However, as the year unfolds there are definite signs of economic 'green shoots', with the annual inflation rate for food and non-alcoholic beverages easing for the 15th consecutive month, there has also been a slight increase in gross domestic product recently and the Bank of England has cut interest rates from 5.25% to 5%, the first drop since March 2020. This coupled with a sense of optimism from both individuals and businesses as a new government with new ideas pledges to drive a growth agenda.

We remain committed to working with British farmers and producers wherever possible and strive to source an ever-growing range of British products and ingredients for our customers. You can download our Celebrating British Produce brochure from the suppliers section of

the Fresh Direct website. Over the past 12 months, we have developed new partnerships with British and European suppliers, driving exceptional levels of product quality and availability. Our unique continental logistics partnership allows producers to concentrate on growing great produce, ensuring we secure more reliable and efficient deliveries direct to both our depots and our European sites serving our Sysco Europe business.

We are proud to be part of Sysco, the global leader in foodservice and we continue to invest heavily in the wellbeing, development and training of our people, the efficiency and sustainability of our sites and the effectiveness, reliability and productivity of our operations.

Fresh produce continues to be a growing category on our customers menus. I was delighted by the success of our recently launched Spring into Summer range, the team will continue to seek out and develop new, innovative products, including a new range from Fresh Kitchen, several of which are Great Taste Award winners.

Finally, I would like to personally thank you for your continued support and allowing us the privilege to supply your fresh food and speciality ingredients.

Industry challenges

Key macroeconomic factors affecting economic confidence, food prices and availability



New UK government

Labour won 412 seats at the election on 5th July, meaning the Conservative Party has lost power for the first time in 14 years.



Food security

In 2024 food security is likely to remain one of the critical challenges for the world to face, exacerbated by war and extreme weather.



Extreme weather

We've been witnessing countries in all corners of the globe endure extreme weather events throughout 2024.



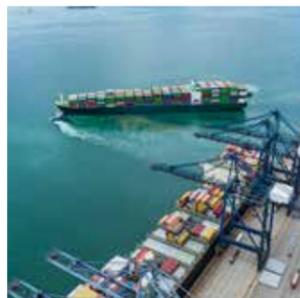
Inflation

The Bank of England predicts inflation will go back up to 2.5%, from around 2.0%, towards the end of the year, before falling again after that.



Labour markets

The employment rate in the UK (among those aged 16 to 64) was 74.4% in July compared with 75.5% in the same period of 2023.



Shipping

In 2024, the global logistics and shipping industries continue to face challenges that are reshaping supply chain dynamics and testing the resilience of businesses worldwide.



Haulage

Hauliers transporting food and fresh produce are facing a number of factors that are increasing their costs.



Ongoing conflict

Wars in Israel-Gaza and Ukraine continue to cause grave concern and directly impact food security and availability.

New UK government

King Charles outlined the new Labour government's law-making plans on 17th July 2024 at the state opening of Parliament. The speech outlined 39 bills Prime Minister Sir Keir Starmer wants to pass in the next parliamentary session after the party's first return to power since 2010.

The proposed legislation covered the following main areas: tax and spending, housing and planning, energy and infrastructure, transport, crime and borders, migration, health and education, employment and technology.

The government aims to introduce an Employment Rights Bill to ban the 'exploitative' use of zero hours contracts along with various other new workers' rights and a Budget Responsibility Bill that will ensure official forecasts must take place ahead of budgets.

Food security

War, weather and economic hardship continue to have a significant effect on food security. The 2024 Global Report on Food Crises (GRFC) states that the population in GRFC countries/territories facing high levels of acute food insecurity increased sharply from 14% in 2018 to more

than 20% each year since 2020, reaching an eight-year high in 2022 of 23%.

Wheat, corn and rice are grown in just a few countries but still account for more than 40% of the world's calorie intake. Any issues put immense pressure on importing countries to maintain consistency of supply.



281.6m

people, or 21.5% of the analysed population, faced high levels of acute food insecurity in 59 countries/territories with data meeting GRFC technical requirements in 2023.

Extreme weather

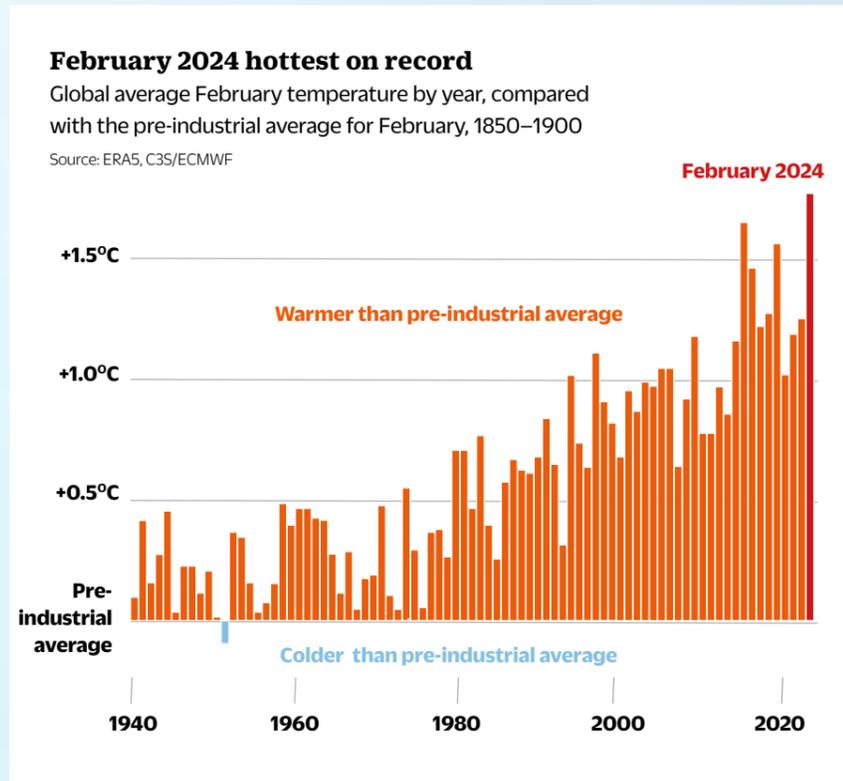
Climate change represents the defining challenge of the 21st century, for both society as a whole and the entire business community. Over time climate change has steadily moved higher up corporate agendas. The emission of greenhouse gases by humans is changing the climate in ways that are harmful to the planet and society.

Last year was the hottest year ever recorded since records began more than a century ago. The effect of extreme weather is continuing through 2024.

February 2024 was the world's warmest February in modern times, according to the EU's climate service, extending the run of monthly records to nine in a row. Each month since June 2023 has seen new temperature highs for the time of year. The 12-month average is now 1.56°C above pre-industrial levels, after the first year-long breach of 1.5°C warming was confirmed in February.

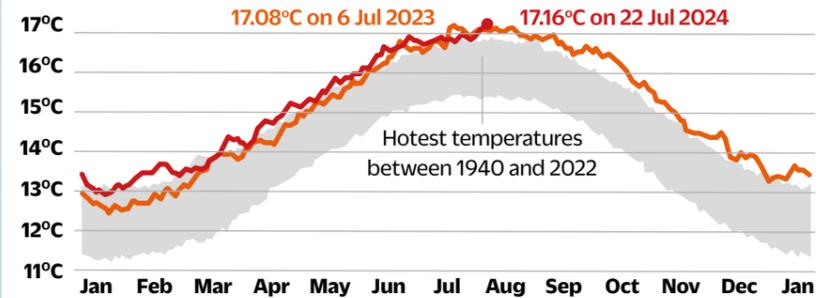
According to the Copernicus Climate Change Service (C3S) data, on 22nd July 2024, the daily global average temperature reached a new record high at 17.16°C.

The impacts of the climate crisis are not just limited to air temperatures. Countless climate metrics are far beyond levels seen in modern times. One particularly striking example is that of sea surface temperatures. Ocean warming has prompted concerns about the mass bleaching of coral reefs, the raising of global sea levels and the effect it has on fuelling higher-intensity hurricanes.



Daily global surface air temperature

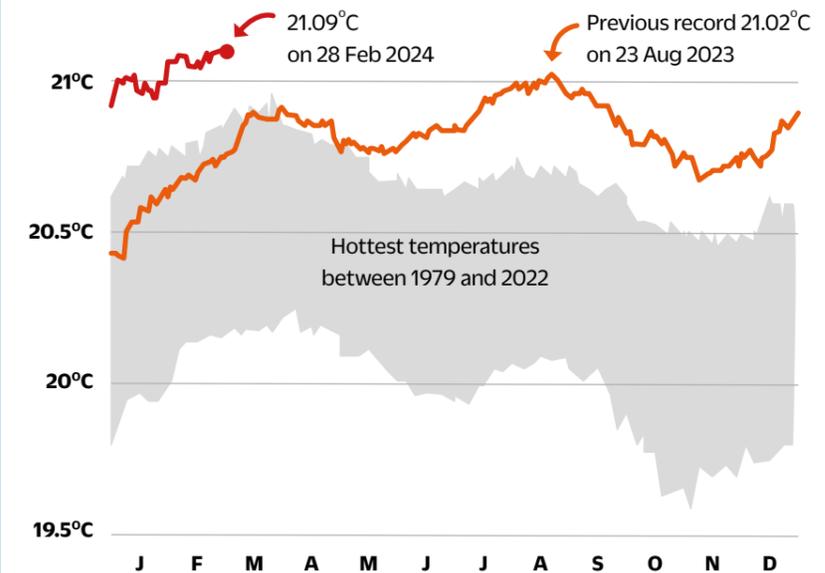
Source: ERA5, Credit C3S/ECMWF



Ocean temperatures highest on record

Daily average sea surface temperature between 60° north and 60° south, 1979–2024

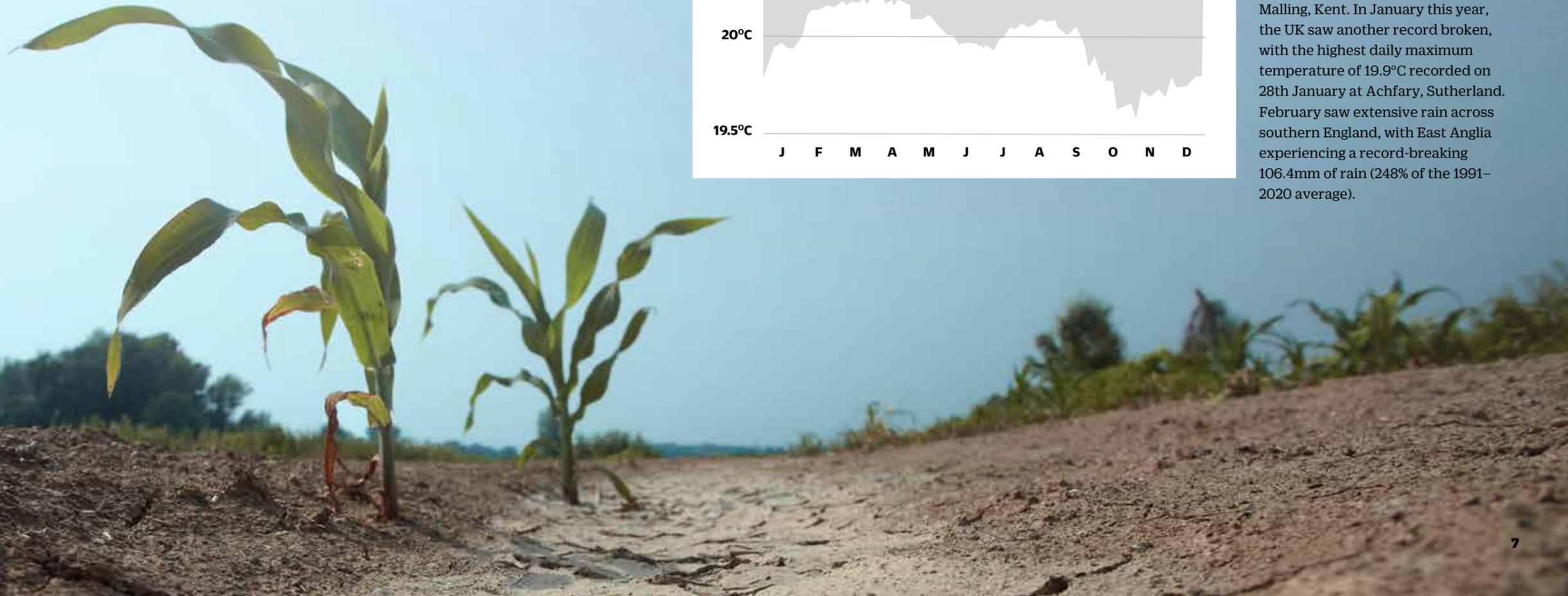
Source: ERA5, C3S/ECMWF



The world's sea surface is at its hottest on record. Temperatures are still being boosted by the Pacific's El Niño weather event, but human-caused climate change is still by far the key driver of the warmth. The name 'El Niño' is widely used to describe the warming of the sea surface temperature that occurs every few years, typically concentrated in the central-east equatorial Pacific.

Professor Celeste Saulo, Secretary-General of the World Meteorological Organization, has stated that 'heat-trapping greenhouse gases are unequivocally the main culprit', with carbon dioxide concentrations currently at their highest level for over two million years, and having increased by near-record levels again over the last year according to the United Nations climate body.

The effects of global warming can also be seen much closer to home. According to Met Office seasonal assessment the UK recorded its highest daily minimum temperature on record for Christmas Day in 2023, with 12.4°C at Exeter Airport and East Malling, Kent. In January this year, the UK saw another record broken, with the highest daily maximum temperature of 19.9°C recorded on 28th January at Achfary, Sutherland. February saw extensive rain across southern England, with East Anglia experiencing a record-breaking 106.4mm of rain (248% of the 1991–2020 average).



Inflation

Overall prices rose by 2.2% in the year to July, according to the Office for National Statistics. This was slightly over the Bank of England's target of 2%, where the rate had been since May. The latest figures mean that prices are now rising faster across the UK than in previous months, but still at a slower pace than in 2022 and 2023.

A recent report on 18th July from the House of Commons Library has compared the UK's inflation performance against other countries using the Harmonised Index of Consumer Prices (HICP), or the CPI as it is known in the UK.

EU inflation was 2.6% in June 2024, down from 2.7% in May. In June 2023, EU inflation was 6.4%.

Inflation in the Eurozone was 2.5% in June, down from 2.6% in May. Eurozone inflation was 5.5% in June 2023.

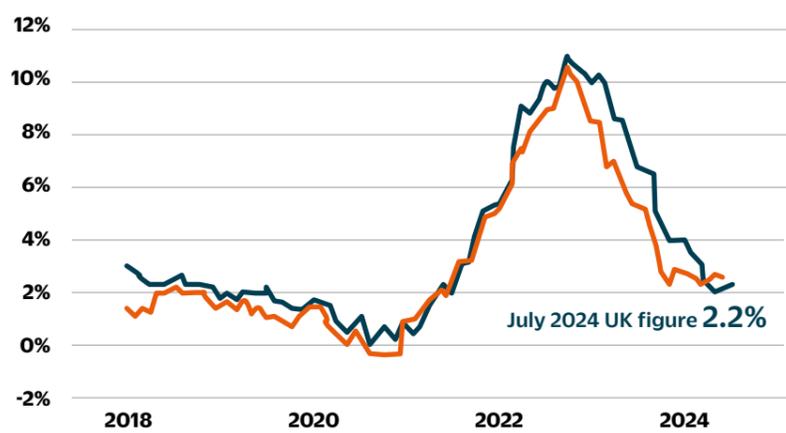
Both Germany and France reported inflation at 2.5% in June 2024, while Belgium had the highest inflation rate in the EU in June 2024 of 5.4%. Finland had the lowest at 0.5%.

Inflation has fallen significantly since it hit 11.1% in October 2022, which was the highest rate for over 40 years. This however does not mean prices are falling, just that they are rising less quickly.

Inflation

Annual % change in consumer prices (HICP)

Source: House of Commons Library



Inflation rates: selected countries

Annual % change in consumer prices (HICP)

Source: ONS, Eurostat

Region	2021	2022	2023	Apr 24	May 24	Jun 24
UK	2.6	9.1	7.3	2.3	2.0	2.0
Eurozone	2.6	8.4	5.4	2.4	2.6	2.5
EU	2.9	9.2	6.4	2.6	2.7	2.6
France	2.1	5.9	5.7	2.4	2.6	2.5
Germany	3.2	8.7	6.0	2.4	2.8	2.5

The Bank of England uses interest rates to try and keep inflation at 2%. It reduced interest rates to 5% in August. The strategy is to make borrowing more expensive, meaning people have less money to spend; however, businesses may decide to borrow less, making them less likely to create jobs, and some may cut staff and reduce investment.

Labour markets

The Office for National Statistics (ONS) labour market overview for the UK in July 2024 suggests that the medium-term trend for employment growth is weakening.

The UK unemployment rate (for people aged 16 years and over) was estimated at 4.4% in March to May 2024, above estimates of a year ago, and increased in the latest quarter.

The UK economic inactivity for people aged 16 to 64 years was estimated at 22.1% in March to May 2024, above

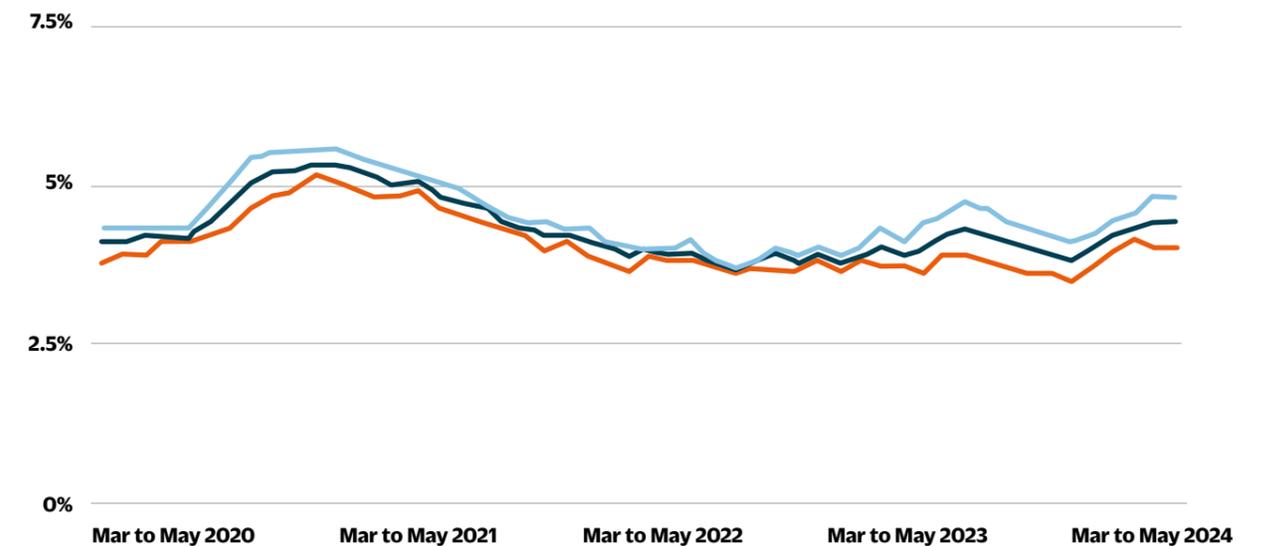
estimates of a year ago, but decreased in the latest quarter.

In April to June 2024, the estimated number of vacancies in the UK decreased by 30,000 on the quarter to 889,000. Vacancies decreased on the quarter for the 24th consecutive period but are still above pre-coronavirus pandemic levels.

Unemployment rate increased on the quarter and on the year

UK unemployment rates for people, men and women, seasonally adjusted, between March to May 2020 and March to May 2024

Source: ONS, Labour Force Survey

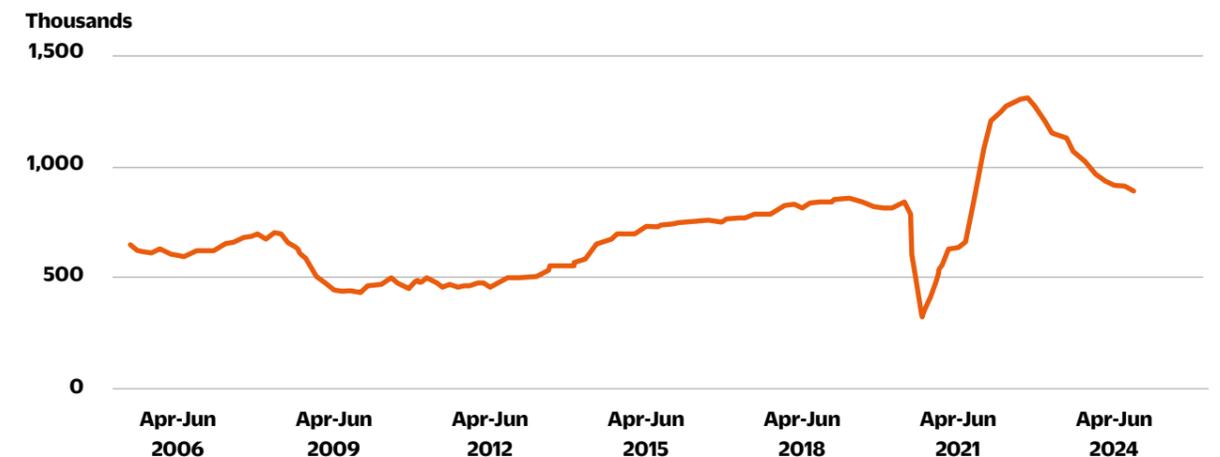


The estimated number of vacancies decreased on the quarter, for the 24th consecutive period, to 889,000

Number of vacancies in the UK, seasonally adjusted, April to June 2005

to April to June 2024 Source: ONS, Vacancy Survey

Source: ONS, Vacancy Survey



Transportation

Shipping

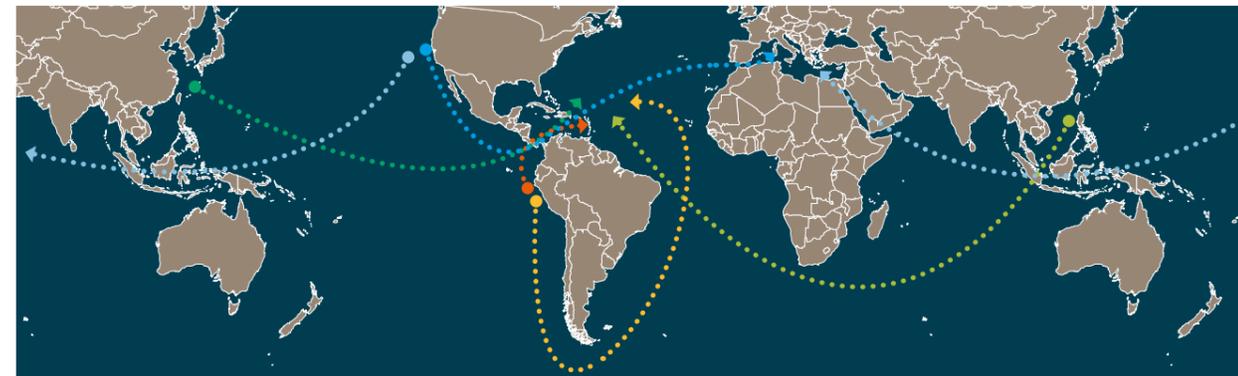
Global shipping challenges have continued in 2024, with war and extreme weather creating bottlenecks around the world, adding uncertainty, delays and increased costs of maintaining supply chain integrity.

The Suez Canal is a critical waterway connecting the Mediterranean and

Red seas. The conflict in the Middle East has changed international trade routes. The number of container ships using the Suez Canal since late 2023 has dropped dramatically according to the Kiel Trade Indicator, an algorithm of the global position data of container ships in real time.

A diversion around the Cape of Good Hope, which many ships are now taking to avoid the Suez Canal, can add 10 days to the journey time and cost an additional \$1m per ship.

The Panama Canal, since its opening in 1914, has played a vital role in world trade. Around 2.5% of global seaborne trade sails through its locks in an average year. The operation of the canal's locks depends on water from Gatun Lake. Severe drought conditions have lowered water levels in the lake, forcing the Panama Canal Authority to restrict ship transits by approximately a third. This will inevitably lead to longer sailing times and increased costs for some ships.



Regular shipping routes could be altered as a result of a slowdown at the Panama Canal

Source: McKinsey & Company

West coast of North America to the Mediterranean Sea
 Old route 21 days
 New route 40 days

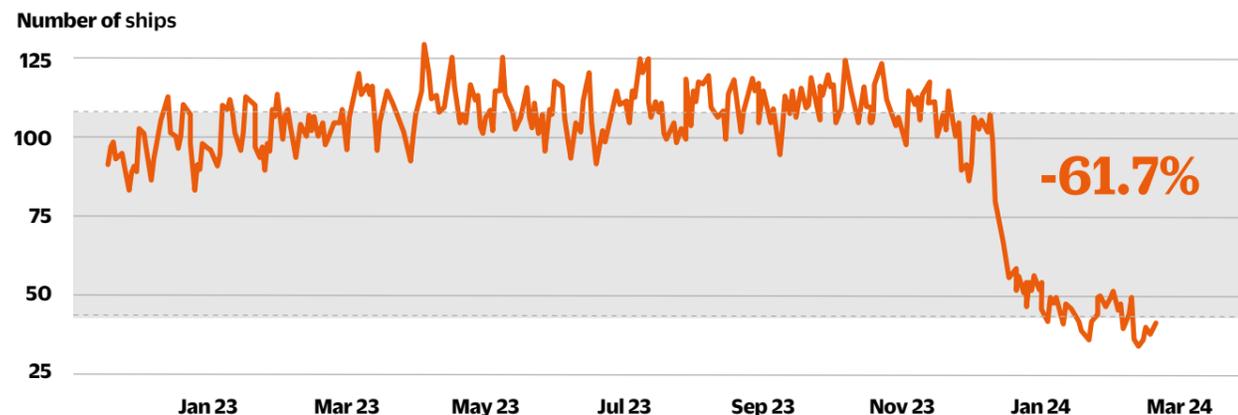
Asia to the Caribbean
 Old route 26 days
 New route 39 days

West coast of South America to the Caribbean
 Old route 6 days
 New route 31 days

Red Sea crisis: Suez Canal traffic plummets

Daily number of container ships in the Red Sea

Source: Kiel Trade indicator



The Suez Canal has seen a 61.7% reduction in shipping since the outbreak of the Red Sea crisis

Haulage

Hauliers transporting food and fresh produce continue to face a number of factors outside their control that are adversely affecting their costs.

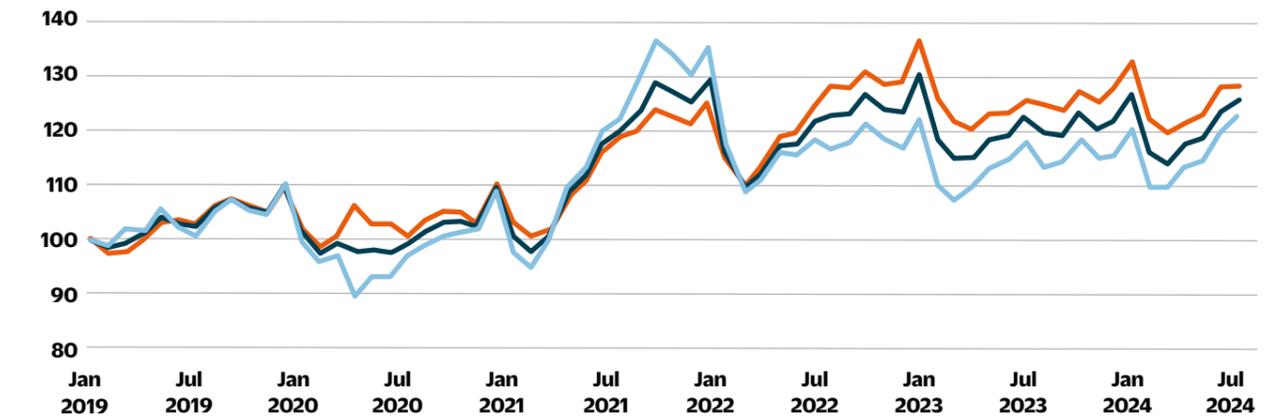
The Transport Exchange Group (TEG) Road Transport Price Index has reported a continued climb in transport prices, albeit below the annual trend. Haulier prices increased by 3.5 points during June; a 2.93% monthly rise.



Transport prices fall across the board in July but remain above 2023 levels

TEG Road Transport Index Source: Transport Exchange Group

Number of vehicles

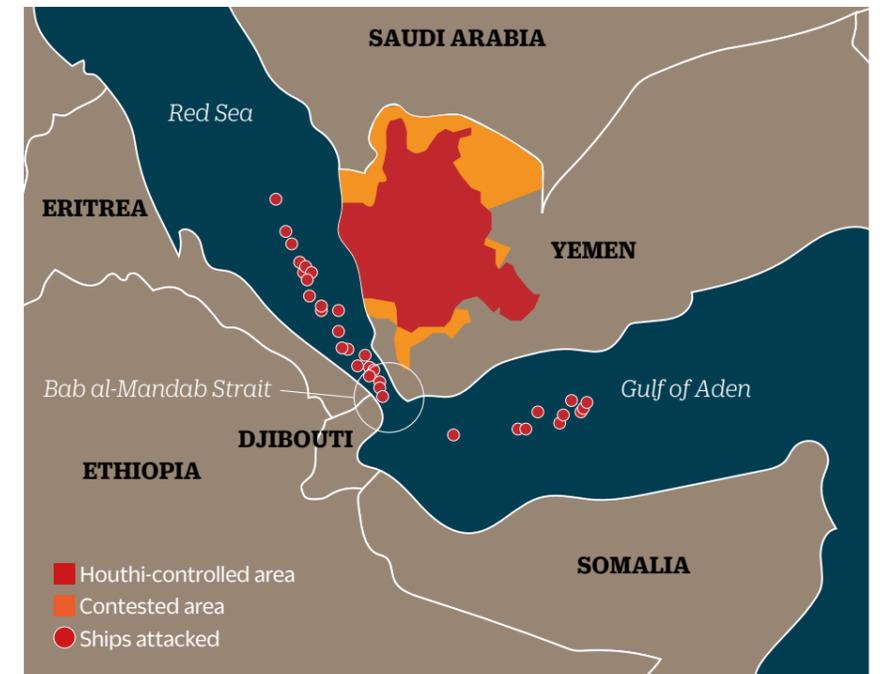


Israel-Gaza and Ukraine wars

There seems little chance of progress in halting the war between Israel and the Palestinian group Hamas that started after the 7th October 2023 atrocities.

In response to the war in the Gaza Strip, the Houthis have launched more than 50 missile and drone attacks on shipping, killed three sailors, seized one vessel and sunk another since November, according to the US Maritime Administration. Major shipping companies stopped using the Red Sea, through which almost 15% of global seaborne trade usually passes, and are using a much longer route around South Africa instead.

Recent events have highlighted the risk of a wider regional war in the Middle East. An article in the Guardian newspaper on 31st July quotes a military spokesman stating 'while we prefer to resolve hostilities without



a wider war, the IDF [Israel Defense Forces] is fully prepared for any scenario'.

Russia invaded Ukraine on 24th February 2022 and there is still no sign

of the war ending. Russia and Ukraine together account for around 20% of the world's cereal grain production. The war continues to have a major effect on the supply and price of products such as wheat and sunflower oil.

The UK economy

Food price inflation

The Office for National Statistics reported on 14th August that prices of food and non-alcoholic beverages rose by 1.5% in the year to July 2024, the same rate as the year to June. The June figure is the joint lowest annual rate since October 2021, when it was 1.3%, and it is the first time since March 2023 that the annual rate has not eased, having seen 15 consecutive months of slowing prices before then.

The annual rate of 1.5% is down from a recent high of 19.2% in March 2023, the highest annual rate seen for over 45 years.

Prices have been relatively stable since early summer 2023, compared with sharp rises over the previous 12 months. The annual rate of 1.5% in July 2024 compares with 14.9% in July 2023.

The products that provided a notable downward contribution to the change in the annual rate included fresh orange juice, sponge cake, canned tuna, and cheese spread. Products providing a notable upward contribution in the annual rate included packs of individual cakes, sliced pre-packed ham, milk, and large chocolate bars.

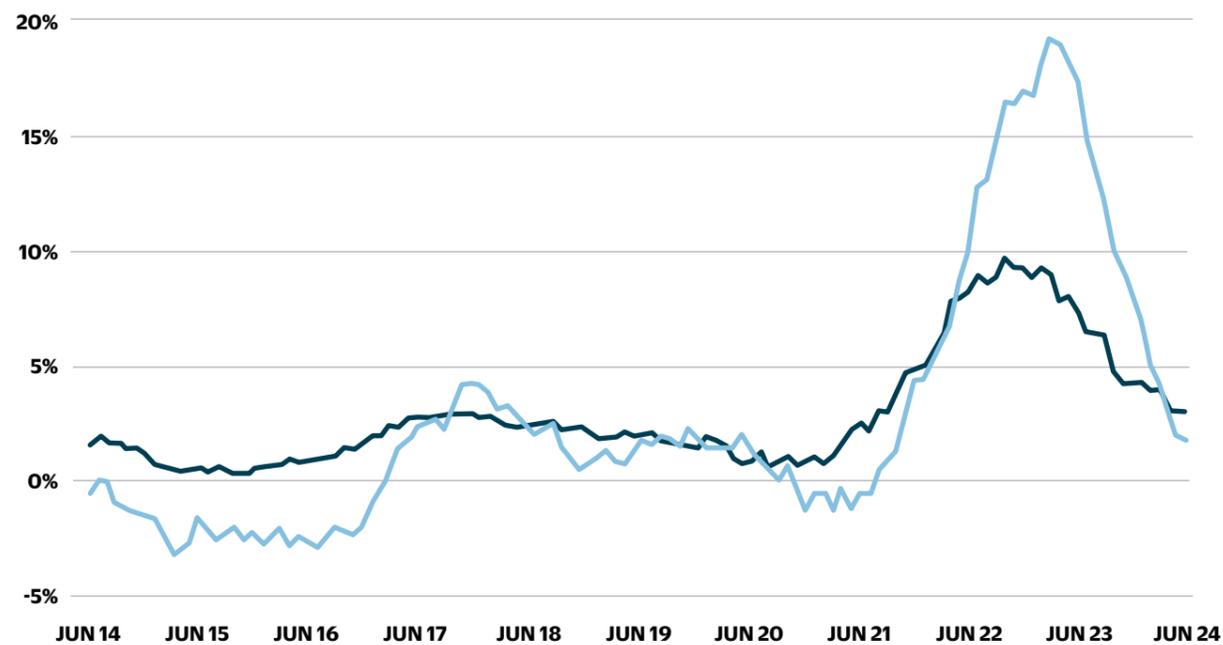


Annual inflation rate for food and non-alcoholic beverages eased for 15th consecutive month

Source: Office for National Statistics

CPIH, and food and non-alcoholic beverages annual inflation rates, UK, June 2014 to June 2024

■ CPIH
■ Food and non-alcoholic beverages



Restaurants and hotels

Prices for restaurants and hotels fell by 0.4% between June and July this year, compared with a rise of 0.9% a year ago. The annual rate rose by 4.9% in the year to July 2024, down from 6.3% in the year to June. The slower annual rate was almost entirely because of the price of hotels, which saw a monthly fall of 6.4% compared with a rise of 8.2% a year ago.

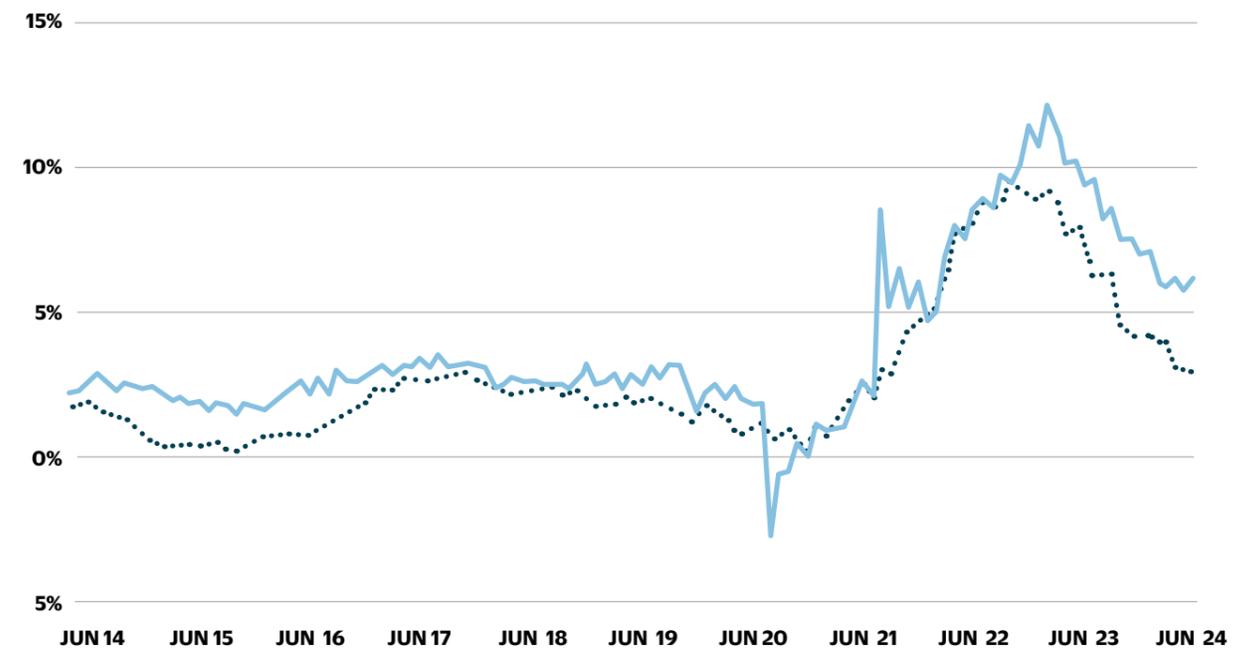


Annual inflation rate for restaurants and hotels rose but remained below previous highs

Source: Consumer price inflation from the Office for National Statistics

CPIH, restaurants and hotels annual inflation rates, UK, February 2014 to June 2024

■ CPIH
■ Restaurants and hotels



Consumer price inflation

The Consumer Prices Index including owner occupiers' housing costs (CPIH) rose by 3.1% in the 12 months to July 2024, up from 2.8% in June, but down from a recent peak of 9.6% in October 2022.

The Consumer Prices Index (CPI) rose by 2.2% in the 12 months to July 2024, up from 2.0% in June 2024, and well below its recent peak of 11.1% in October 2022. The Office for National Statistics indicative modelled consumer price inflation estimates suggest that the October 2022 peak was the highest rate in over 40 years (the CPI accredited official statistic series begins in January 1997).

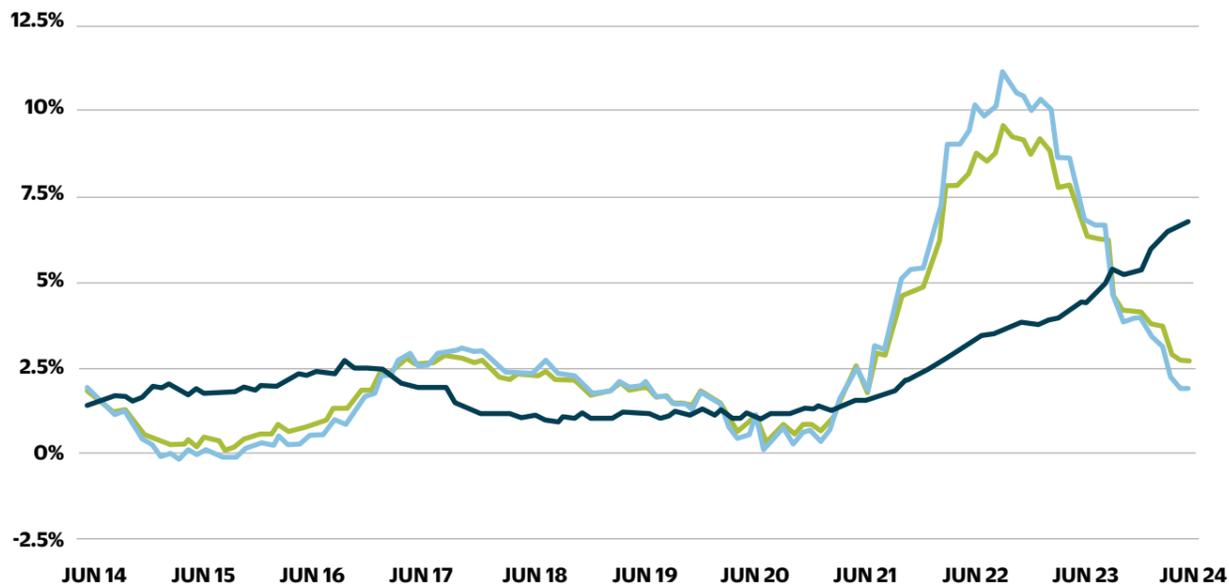
The rise in the annual CPIH inflation rates in July 2024 reflected upward contributions from four divisions, offset by downward contributions from five. The largest upward effect came from housing and household services. The largest downward effects came from restaurants and hotels, and transport.



Annual CPIH and CPI inflation rates were unchanged from May 2024

Source: Consumer price inflation from the Office for National Statistics

CPIH, OOH component (owner-occupied housing costs) and CPI annual inflation rates for the last 10 years, UK, June 2014 to June 2024



Consumer confidence in the United Kingdom

The third monthly increase since March is driven by optimism about UK economy.

The Consumer Confidence Survey measures the level of optimism that consumers have about the performance of the economy in the next 12 months. The Growth from Knowledge (GfK) consumer index is derived from a sample of around 2,000 consumers. They are asked to rate the relative level of past and future economic conditions including overall economic situation and savings levels, personal finance situation and climate for major purchases.

The GfK's long-running Consumer Confidence Index increased three points to -14 in June. Three measures were up, one was down, and one was unchanged from the previous month.

UK consumer confidence measures – June 2024

Source: GfK Consumer Confidence Barometer powered by NIM

Measure	▲▼	Jun 24	May 24	Apr 24	Jun 23
Overall Index Score	+3	-14	-17	-19	-24
Personal financial situation over last 12 months	0	-10	-10	-11	-15
Personal financial situation over next 12 months	-3	+4	+7	+2	-1
General economic situation over last 12 months	+7	-32	-39	-41	-54
General economic situation over next 12 months	+6	-11	-17	-21	-25
Major Purchase Index	+3	-23	-26	-25	-25
Savings Index	-5	22	27	26	25

Consumer Confidence Index

Source: GfK Consumer Confidence Barometer (June 2024)

Joe Staton, Client Strategy Director GfK, says: 'Once again we have an improved reading for the Overall Index Score with June showing a three-point improvement bolstered by consumers' more sympathetic view of the economy for the last year and the 12 months to come. Those measures on the economy registered sharp increases of seven

points and six points respectively, and there was a welcome three-point boost in intentions to make major purchases. While June's reading of -14 is the third month in a row that confidence has increased, the headline score remains negative owing to the difficulties so many have experienced as the unrelenting cost-of-living crisis batters

household budgets. Nevertheless, consumer confidence continues its robust long-term upward trend this month, and has recovered significantly since the record low of -49 reached in September 2022. Consumers like financial certainty, and this has to be the cornerstone if we are to see confidence break out into positive territory.'



National Living Wage and National Minimal Wage

From 1st April 2024, workers aged 21 and over will be entitled to the National Living Wage; previously it was for workers over 23 years of age. The rates apply to staff even if they are not paid by the hour.

Some employers pay the Real Living Wage; this is an unofficial rate overseen by the Living Wage Foundation charity. It is based on what the charity believes people need to earn. They state that more than 460,000 employees working for 14,000 firms currently receive the Real Living Wage. It is however not a legal requirement.

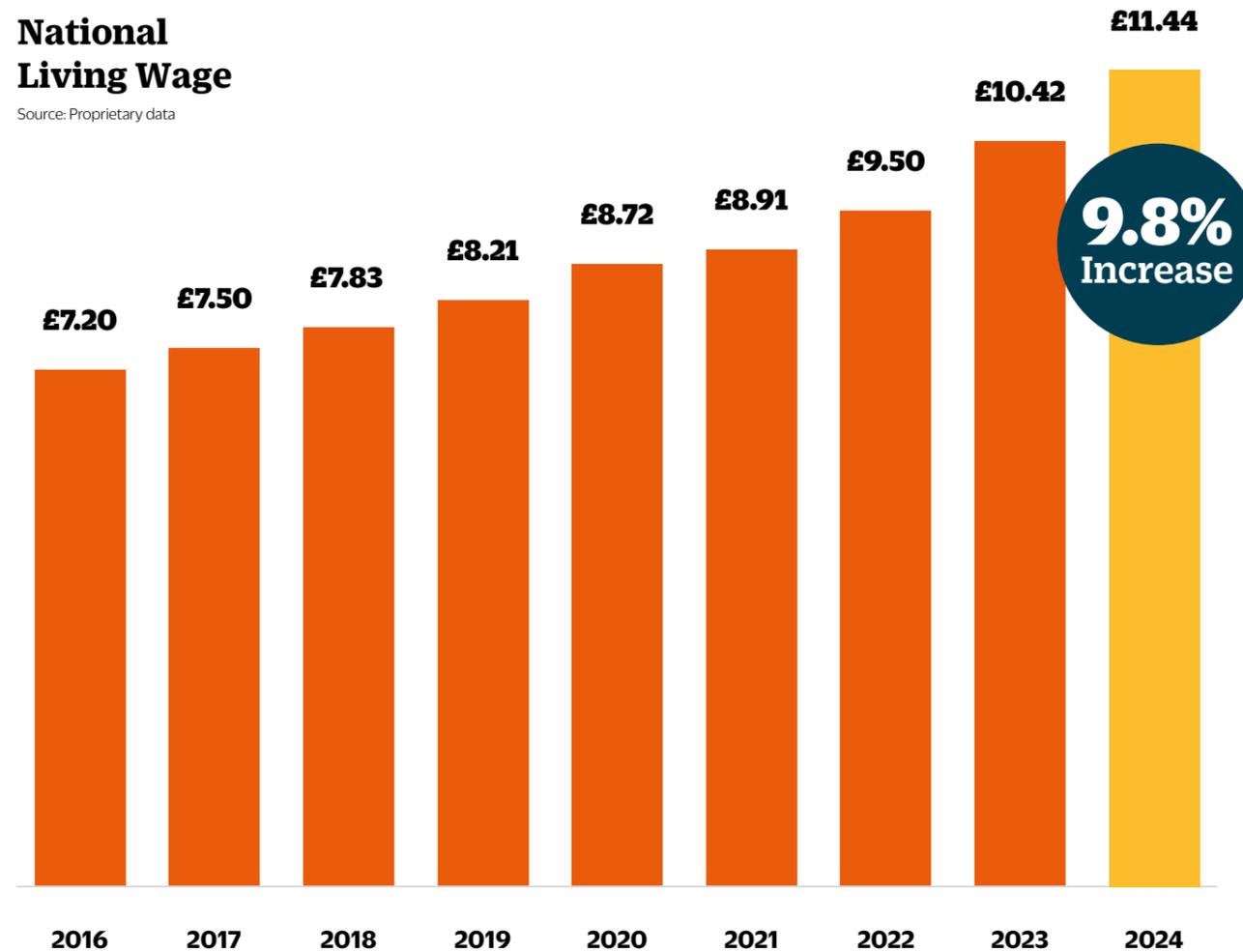


Increase in hourly rates From 1st April 2024

New National Living Wage hourly rate			
Age	April 2023	% increase	April 2024
21 and over	£10.42	9.8%	£11.44
18 to 20	£7.49	14.8%	£8.60
Under 18	£5.28	21.2%	£6.40

National Living Wage

Source: Proprietary data



Interest rates

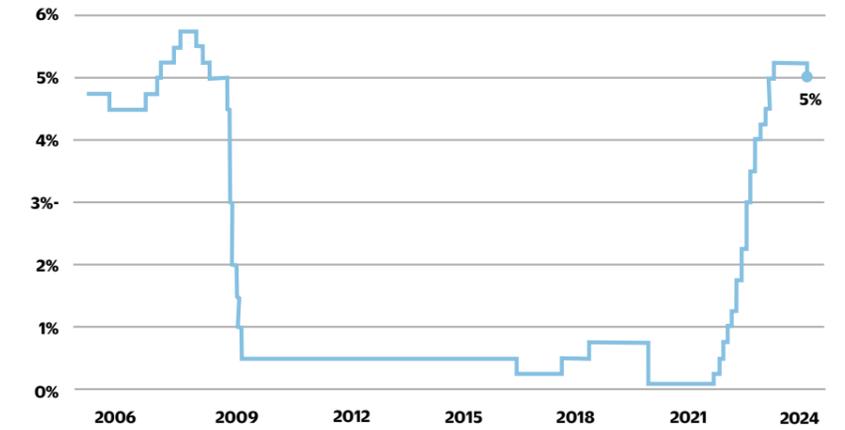
The Bank Rate was almost zero (0.1%) at the beginning of December 2021, then the Bank of England began to raise rates to help slow inflation, the rate at which prices are rising. This policy is working and inflation has fallen a lot, and is currently at the 2% target. On 1st August the Bank of England's rate-setting committee voted by a majority of five to four to cut interest rates from 5.25% to 5%, the first drop since March 2020. The Bank had previously held rates at a 16-year high of 5.25% since August 2023.

The Bank is forecasting that inflation will increase to about 2.75% later this year before returning to its 2% target in 2025.

Current Bank Rate 5% Next due: 19 September 2024
Current Inflation Rate 2% Target 2%

UK interest rate cut to 5%

Source: Bank of England



UK workforce

Employment

The UK employment rate for March to May 2024 (74.4%) remains below estimates of a year ago.

The annual decrease was largely due to part-time workers. The number of people in employment with second jobs has been decreasing since mid-2023, but increased in the latest three-month period and on the year to 1.25 million, with 3.8% of people in employment.

Unemployment

The UK unemployment rate for March to May 2024 (4.4%) is above estimates of a year ago and it has increased in the last quarter. The published Claimant Count, a measure of the number of people who are receiving a benefit principally for the reason of being unemployed, was 1.663 million.

The labour market continues to normalise in most areas but it continues to be held back by persistently higher levels of economic inactivity

Change in UK unemployment, employment and economic inactivity, from pre-pandemic levels, in thousands, from December 2019 to December 2023

Source: PWC analysis, ONS



Economic inactivity

The UK economic inactivity rate for March to May 2024 (22.1%) is above estimates of a year ago, but has decreased in the last quarter.

Reasons for economic inactivity are many and varied but include students, people looking after family or home, long-term sickness or for other lifestyle choices or necessities. It also includes people who have taken early retirement.

Gross domestic product

Gross domestic product (GDP) estimates the main measure of UK economic growth based on the value of goods and services produced during a given period.

GDP is estimated to have grown by 0.9% in March to May 2024 compared to the previous three-month period (December 2023 to February 2024). It grew by 0.4% in May 2024 compared to April, after showing no growth (0.0%) in April.

All three main sectors saw growth in May, with growth of 0.3% in the

services sector, 0.2% in production and 1.9% in construction.

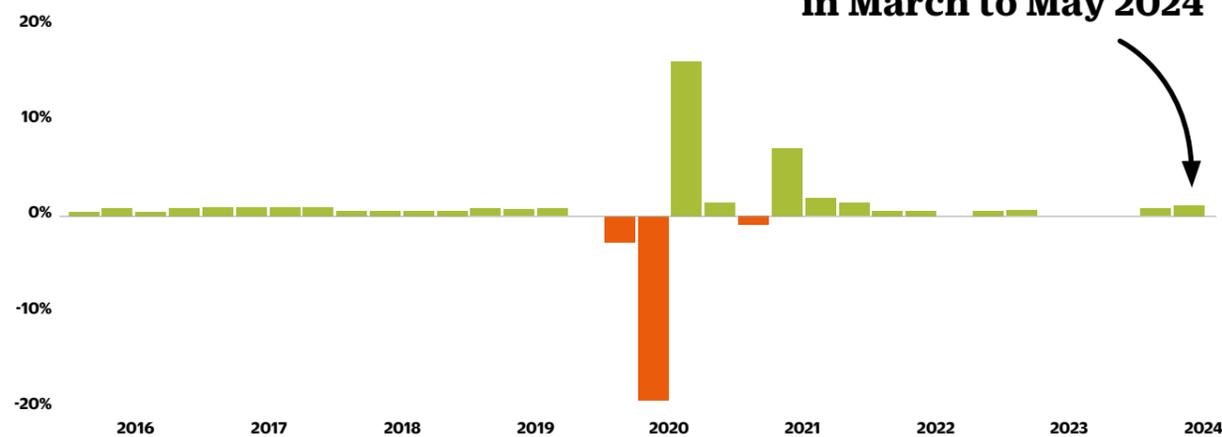
The Office for Budget Responsibility (OBR), in its March 2024 economic and fiscal outlook, forecast 0.8% in 2024 and 1.9% in 2025; however, the Treasury's May 2024 survey of independent forecasts shows an average forecast of 1.2% for 2025.



GDP growth, % change on quarter

Calendar quarters and latest three-month period

Source: House of Commons Library



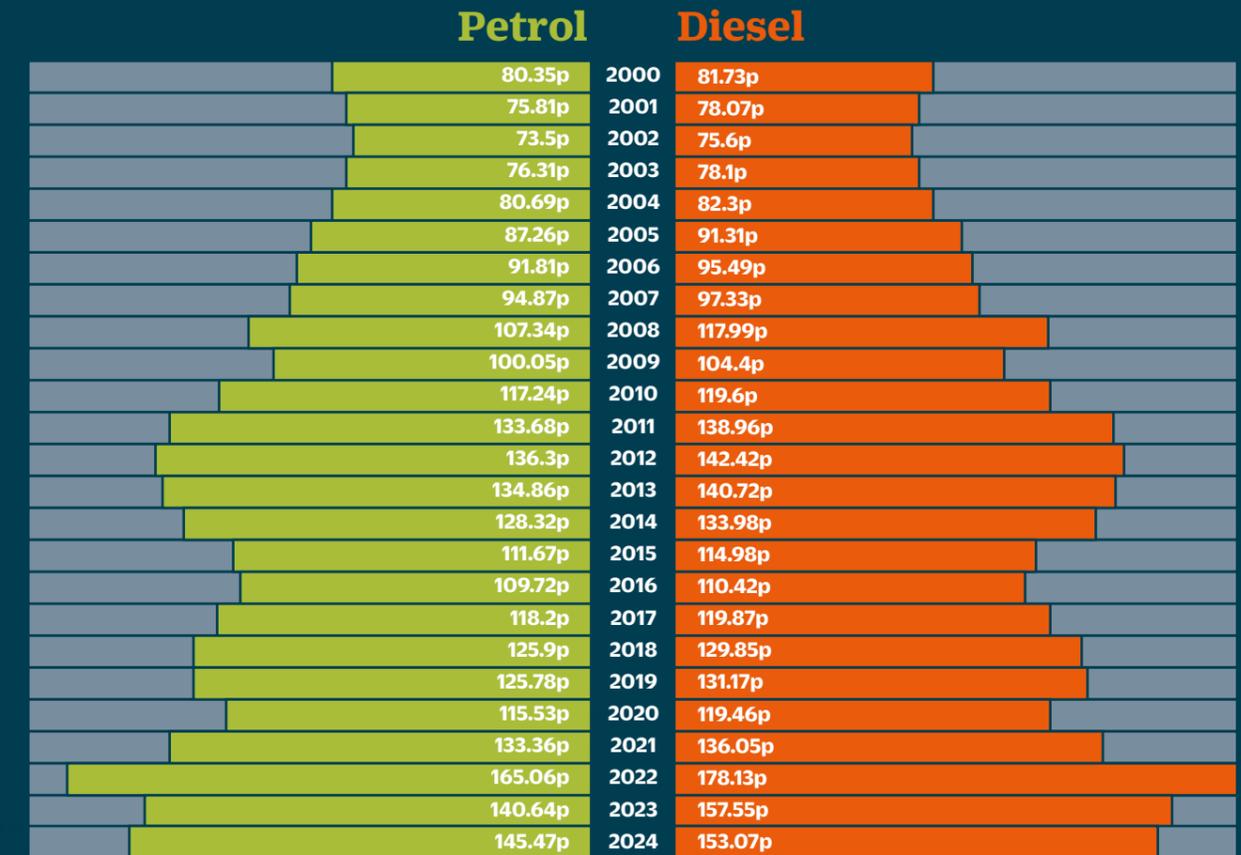
GDP is estimated to have grown by 0.9% in March to May 2024

Average UK petrol and diesel prices by year

Current year's averages are for the year to date

The Competition and Markets Authority (CMA) commented in July that weakened competition in the fuel sector is impacting drivers' wallets. It found that supermarkets' profit margins for fuel had doubled since 2019.

The British Retail Consortium said: 'Retailers will continue to work closely with the CMA and provide the necessary data to allow consumers to find the best prices for petrol and diesel.'



Source: RAC Fuel Watch (errors and omissions excepted)



Produce value rankings

The Fresh Produce Journal's (FPJ) 'Big 50' product rankings for 2024 represent the overarching trends shaping the sector's sales performance. While the ranking values are based on retail sales, there are commonalities across foodservice.

This year's rankings reflect a gradual and sustained improvement in consumer confidence, with the salad category comprising tomatoes, cucumbers and peppers all faring well in terms of higher value rankings.

Certain commodity products such as apples, bananas and onions have remained strong, as have berries, while more discretionary categories such as asparagus, avocados and cherries have declined in sales volume or lost positions on the rankings table.

Despite this, premiumisation remains a common theme with consumers continuing to treat themselves. The total UK retail fresh produce market has seen an 8.2% increase in value versus last year, valued at £12.8 billion (Source: Kantar, May 2024).

Top three risers and fallers by value within the top 50



Cucumbers
+25.6%



Peaches
+19.2%



Onions
+18.3%



Cherries
-1.8%



Peas
-3.5%



Brussels sprouts
-4.1%



Rank	Product	Value	Position compared to 2022
1	Dessert apples	£965.9m	Non-mover
2	Tomatoes	£938.9m	Up 1
3	Grapes	£895.7m	Down 1
4	Strawberries	£854.6m	Non-mover
5	Bananas	£674.3m	Non-mover
6	Blueberries	£579.9m	Non-mover
7	Old potatoes	£532.5m	Up 2
8	Easy peelers	£508.1m	Down 1
9	Peppers	£490.7m	Up 1
10	Mushrooms	£480.0m	Down 2
11	Cucumbers	£426.8m	Up 1
12	Raspberries	£373.4m	Down 1
13	Onions	£342.4m	Non-mover
14	Broccoli	£312.1m	Non-mover
15	New potatoes	£272.0m	Non-mover
16	Lettuce	£271.8m	Non-mover
17	Pears	£242.6m	Non-mover
18	Carrots	£230.9m	Non-mover
19	Baking potatoes	£218.9m	Up 1
20	Avocados	£214.4m	Down 1
21	Oranges	£187.3m	Non-mover
22	Melons	£178.1m	Non-mover
23	Beans	£151.7m	Non-mover
24	Cauliflower	£122.9m	Non-mover
25	Sweetcorn	£117.4m	Up 1
25	Cherries	£112.8m	Down 1
27	Cabbage	£104.8m	Non-mover
28	Courgettes	£103.8m	Up 2
29	Nectarines	£102.6m	Down 1
30	Spring onions	£101.5m	Down 1
31	Lemons	£92.1m	Non-mover
32	Leeks	£86.0m	Non-mover
33	Plums	£85.1m	Non-mover
34	Kiwis	£80.6m	Up 1
35	Asparagus	£80.1m	Down 1
36	Sweet potatoes	£78.0m	Non-mover
37	Celery	£68.6m	Non-mover
38	Garlic	£613.8m	Non-mover
39	Blackberries	£54.1m	Up 2
40	Mangoes	£54.0m	Down 1
41	Peaches	£53.9m	Up 3
42	Spinach	£52.7m	Up 4
43	Peas	£52.3m	Down 3
44	Beetroot	£46.5m	Down 1
45	Brussels sprouts	£45.6m	Down 3
46	Parsnips	£44.7m	Down 1
47	Pineapples	£36.8m	Non-mover
48	Aubergines	£36.4m	Non-mover
49	Limes	£36.3m	Non-mover
50	Swedes	£30.5	Re-entry

Source: Kantar, 52 w/e 12 May 2024

The total UK retail market for fresh produce is worth £12.8bn, up 8.2% on a year ago

With over 6.2bn kg of fruit and vegetables sold in UK supermarkets over the past year

Industry insight



By Cian O'Mahony

Insights and Planning Specialist UK, Bord Bia

Foodservice and hospitality insight

Consumer trends within the UK food and drink industry, and beyond, are currently subject to an unprecedented number of macro factors. This includes anxieties around health, the climate and AI; inflationary pressures; increasing distrust in authority and leadership; and the unrelenting pace of influence and cultural change.

All this is set against the backdrop of an evolving post-pandemic sense of wayfinding and a search for meaning. This combination of social, technological, economic and political factors is shaping the consumer needs of today and tomorrow. Bord Bia's (The Irish Food Board) Cultivate research programme identifies and explores these emerging needs and trends in action, looking at how

operators are responding and how food and drink businesses can tap into the opportunities they provide.



Purposeful Lives is the first area Cultivate explores, centred around people's search for a greater sense of meaning and truth. Some key micro trends identified here include 'Quiet Luxury Dining', where consumers are

looking for honesty and quality in their food experiences, 'Natural Identities', which sees people seeking out a connection to nature that grounds them, and 'Glocal Discovery', where consumers prioritise genuine cross-cultural experiences. We can see some of these trends in action with the recently opened Fallow in Canary Wharf, tapping into that desire for a connection with nature through its vertical foraging garden. Meanwhile, Hot Dogs by Three Darlings – a newly opened restaurant at Harrods – embraces cross-cultural trends with a range of gourmet hot dogs inspired by flavours from around the world.



The Supportive Society examines how, in a post-Covid world, people are looking to rebuild their social connections and how there is significant opportunity for food and drink companies to be at the centre of that reconnection. Two key behavioural trends emerging within this area include 'Foodie Fandoms' and 'Communal Dining'. Foodie Fandoms explores how consumers are outwardly expressing their allegiances to food and drink businesses, and how operators are responding. Blank Street Coffee is capitalising on this trend in the UK, offering category-blurring coffee-lovers' apparel in the form of socks, bags and other accessories that allow consumers to proclaim their allegiance to the brand. Wagamama meanwhile has recently tapped into the Communal Dining trend via its live music event 'Soul Sessions', which fostered a sense of community and provided an outlet for people to gather and connect around food.



Wholesome Living explores how people are searching for simpler, less complicated ways to be healthy, while also finding a balance with the earth. Specific trends playing out in this space include 'Processed Obsessed', which sees people increasingly scrutinise what it means for food and drink to be natural, and they are therefore looking for more trustworthy signs that they have permission to eat 'clean'. Several operators in the UK speak to this, highlighting the natural, whole foods they have on offer, including the likes of Leon, Pharmacy and The Good Life Eatery. 'Fermented Fashion' represents the ever-growing interest in more natural, authentic routes to gut health. This interest in immunity-boosting products accelerated during the pandemic but has since evolved rapidly as people's knowledge of the gut microbiome grows. Within UK hospitality, many operators are focusing on fermented,

gut-friendly foods that cater to this growing interest and understanding.

On Demand looks at how, in a post-pandemic world, life is speeding back up and people are seeking more flexible and adaptable ways of living, which extends to how they eat and drink. As consumers look for solutions that match their 'need it now' mindsets, we're seeing some key trends emerge, including 'Frictionless Food to Go'. This trend explores how people's demand for fast food and drink has grown amid the resurgence of busier lifestyles, and how businesses are responding with more elevated self-service offerings to meet expectations around speed, quality and convenience. We see this playing out in the UK through various channels, including self-service 'e-bars' popping up in event spaces serving drinks in 30 seconds, augmented reality (AR) menus providing a seamless, frictionless ordering experience in Wahaca and Inamo, and with BP's new micro-market self-serve concept for forecourts, under the Wild Bean Cafe brand.

More detail on these trends and their implications for food and drink businesses can be found by contacting cian.omahony@boardbia.ie



Industry insight



The future of foodservice

The next six months

We forecast that the rest of 2024 and the first few months of 2025 will remain tricky for the UK foodservice/hospitality market, despite an improving economic picture. In particular, we expect challenging trading conditions for the pub and casual dining sectors.

There are several reasons for this caution. First, although interest rates have decreased, inflation may tick upwards in October and interest rates will remain high for a while. Second, while consumers are experiencing wage growth in real terms, they are saving more. Finally, cost inflation for foodservice remains high, and operators must balance

increasing menu prices with consumer expectations of reducing inflation (and prices).

Polarisation between value-driven fast-food consumption and experiential, premiumised dining may increase, causing problems in the middle, unless the experience can be enhanced to justify higher prices. We expect to see more promotions and more deals in place as a result.

There will be pockets of success, especially with city centres, certainly London, returning to higher levels of trade. We are seeing higher numbers of inbound tourists this year, boosting spend.

The political landscape has stabilised – although if taxes rise, the effects will be felt in foodservice and hospitality through reductions in disposable incomes, and a tougher investment climate for businesses. Unemployment is expected to increase slightly over the next year.

Expanding on our key 2024 theme of ‘Friction Free and the Pleasure Principle’, we expect more tech-driven solutions, including drive-thrus, self-service bars and ‘just walk out’ shops, along with ‘unattended retail’, or vending machines.

There are a growing number of entertainment and immersive experiences, along with absolute

luxury restaurants and hotels, especially in London. Pub companies are increasingly recognising the value of their boutique accommodation, developing rooms and tailoring their offer to an older, leisure-focused, affluent demographic looking for alternatives to the budget chains.

Meanwhile, competitive socialising is on the rise, and food and drink can make up 50% of revenues at concepts such as TOCA Social, Puttshack, Bounce or Hijingo. Further growth is expected in the market halls sector, driven by redevelopment of town centres. This provides a way for authentic, artisanal street food creators to reach new audiences, while offering great value.

Full-year growth for 2024 is forecast to be +2.8%, despite the challenges, with forecasts for 2025 of a similar +2.7% in revenues despite a small decrease in the total number of outlets. The

economic picture in 2025 will improve, but the industry will need to keep innovating and demonstrate value.

To achieve growth, operators must focus on:

Value – through menu and price engineering.

Experiences – that are hard to replicate at home.

Innovation – to keep tempting consumers.

Treating – even if healthier.

Sustainability – consumers are more demanding.

There will be growth – and success – for operators that can deliver all of these, as consumers recover their appetite for eating and drinking out of home.

Food and drink can make up 50% of revenues at activity-led social hotspots



Food trends and innovation



By Ian Nottage

Ian Nottage is an experienced chef working across multiple roles in the food and beverage industry, and Head of Food Development at Fresh Direct.

The diary of a chef

As we look ahead to autumn and winter, the Food Development team have been busy as ever in the innovation kitchens, working with our customers to deliver on-trend, sustainable menu solutions.

A hot topic is sustainable farming. We're delighted to be working with several vertical farms, ensuring year-round UK supply of certain crops and reducing food miles. I've been involved with vertical growing for a long time, and in the past I was sceptical, with those early crops being a little frail and lacking the flavour of outdoor crops. But this is no longer true. The quality of the chives, basil and rocket we've been working with is second to none, and the shelf life is incredible. I'm excited to see what we can do next with these amazing growers.

Meanwhile, the demand for plant-based innovation continues. We've had a lot of fun with our two foraged mushroom 'meat' products made from the waste stalks of the Portobello mushrooms grown for us in Ireland – another great sustainability story. These products have the texture of pulled meat and a clean flavour. We've used them to create everything from faux crispy duck and pulled pork, to barbecued 'burnt ends', teriyaki shrooms and meaty ragus. Keep an eye on our socials for all these recipes.

We've been hard at work in Fresh Kitchen too, with many new product launches including a range of innovative compound salads. We've also got a Southern States-inspired comeback sauce, Filipino banana ketchup, Spanish romesco sauce and

a whole host of authentic Indian curry sauces including makhani, chana masala and Madras. Watch out for other exciting developments in the coming months, too.

In the world of fresh fish, I've been speaking to our fish guru Matt about what we should be featuring on autumn and winter menus. Current advice is to avoid wild-caught flat fish such as plaice and sole from November to March – this is spawning season, causing poor flesh yields due to fish carrying roe. And from February to the beginning of April there is a ban on wild, UK-landed sea bass. This is when farmed fish comes into its own, such as meagre. This is a

delicious, firm-fleshed meaty fish that makes a great alternative to wild bass.

We're expecting further quota cuts on Barents Sea cod, so consider swapping it out for haddock. Even better, and more cost-effective, is coley – under-used, but sustainable and very tasty.

Lately we've been working with two fabulous species that we'll be championing at our autumn and winter menu workshops and presentations. Firstly ray (or skate), which has had its sustainability rating improved and has year-round availability at a good price. Whether served classically with a black caper and lemon butter, or poached,

spiced and shredded for tacos, this is a lovely fish to work with.

Finally, wild British shellfish such as our MSC Shetland mussels and Dorset clams are a great choice through the autumn and winter months, and lobster and crab should be in good supply too. So whether it's a hearty bowl of moules marinières, pasta alla vongole, crab cocktail or indulgent grilled lobster, putting premium shellfish on the menu is a winner.

I hope you all have a profitable autumn and winter period and get to try some fabulous seasonal ingredients in your kitchens. Happy cooking!



Skate wing amandine with kale and lemon

Focused on sustainability

As the UK's leading provider of fresh produce to the foodservice industry, we recognise our duty to lead on sustainability in our sector. It's our responsibility not just to make our business the most sustainable it can be – we also need to do our utmost to inspire the rest of our sector to do the same.

PEOPLE

PRODUCTS

PLANET



For people: we care by giving back, doing good and changing lives in our communities, playing our part in supporting our parent company Sysco's global goal to provide \$500m of good by 2025, including £10m in Britain. Sustainability is driven by our people, and we aim to empower them, while creating a diverse, equitable and inclusive workplace.

As part of Sysco, we're creating a global culture that is decidedly diverse, equitable and inclusive. Every individual at Sysco contributes to our purpose, bringing a unique skillset and perspective to their work each day. Simply put, we're better together. That's why we're working hard to foster a culture of belonging that enables us to care for one another and connect the world through food and trusted partnerships.

For products: we will supply products responsibly by sourcing locally wherever possible from over 100 British suppliers, minimising negative environmental, social or ethical impacts; and ensuring that human rights are respected. With a marketing focus on encouraging customers to choose British, we've taken steps to move more key products to the UK. Our Sustainability team are constantly pushing the boundaries on packaging to ensure that we use only what we need to use.

For planet: we're committed to protecting the planet by advancing sustainable agricultural methods. We're also diverting waste from landfill (with zero to landfill since 2016). We're playing our part in identifying the future for foodservice delivery, as Sysco seeks to overcome the barriers to decarbonisation with ongoing trials focusing on how we deliver to customers, with Fresh Direct joining other Sysco businesses in committing that no diesel vehicles will be purchased after 2030. This is no mean feat, considering that Fresh Direct operates a fleet of more than 250 vehicles.

Across our businesses we've had some fantastic success stories this year, including:

Plastic-free avocado packaging



We've launched new, plastic-free packaging for our best-selling avocado twin-pack.

The new packaging, developed by our key avocado supply partner, Westfalia Fruit, is the first time that the packaging has been used in foodservice. It replaces the current plastic packaging with a paper-based pack, which is made from actively managed, FSC-approved sources, where forests are regenerated as trees are replanted, and is fully recyclable.

Mushroom meat reducing food waste



Our new mushroom 'meat' is an innovative product that provides a healthy centre-of-plate alternative to meat. And what's most impressive is that it's made from the stalks of mushrooms that would otherwise be discarded.

Working with specialist Irish mushroom grower Umi Foods to

harvest, cook and shred the surplus products, we've created what our Head of Food Development describes as 'a fantastic alternative to more traditional centre-of-plate options'.

Berry packaging



We've brought in some innovative new packaging for our range of berries that is drastically reducing plastic content by almost 50 tonnes of plastic every year.

Working with our key berry supplier, Driscoll's, we've moved our strawberries, blueberries, raspberries and blackberries into the new FSC-certified paper packaging.

Supporting our community with two million meals



We've donated the equivalent of more than two million meals to those most in need, reaching this milestone as we celebrate five years of working with food redistribution charity FareShare.

Since launching the partnership in 2018, Fresh Direct and FareShare,

which is the UK's largest charity fighting hunger and food waste, have saved around 850 tonnes of food that would have otherwise gone to waste, supporting Sysco's purpose, Connecting the world to share food and care for one another.

Supporting customers to do more

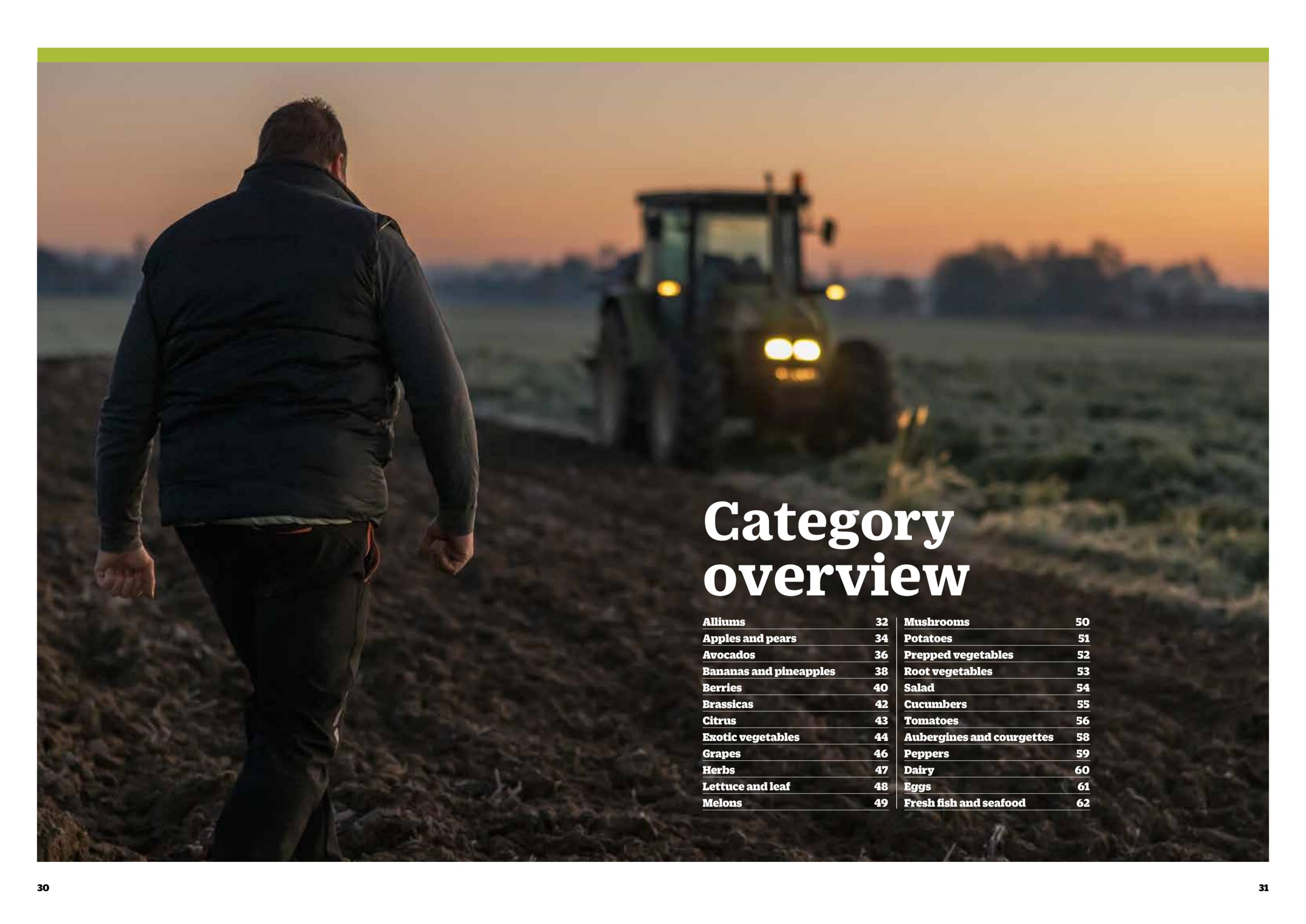


We know how important it is for us to support customers, so as part of a nationwide Sysco GB initiative, we're offering sustainability training to all of our colleagues in Fresh Direct.

We've joined forces with specialist sustainability consultancy Knowledge Labs from Nutritics to deliver a wide-reaching, bespoke training programme to help give colleagues the knowledge and tools to support customers in becoming more sustainable.

The programme contains eight modules, including key sustainability topics such as Climate Change, Carbon Footprinting, Operational Sustainability, Healthy and Sustainable Diets, and Food Waste, enabling colleagues across the business to better understand the importance of sustainability at Sysco and within its customers' businesses.

This initiative has already been awarded a Foodservice Footprint Award and been shortlisted for a Fresh Produce Consortium Sustainability Award.



Category overview

Alliums	32	Mushrooms	50
Apples and pears	34	Potatoes	51
Avocados	36	Prepped vegetables	52
Bananas and pineapples	38	Root vegetables	53
Berries	40	Salad	54
Brassicas	42	Cucumbers	55
Citrus	43	Tomatoes	56
Exotic vegetables	44	Aubergines and courgettes	58
Grapes	46	Peppers	59
Herbs	47	Dairy	60
Lettuce and leaf	48	Eggs	61
Melons	49	Fresh fish and seafood	62

Alliums

Onions

Following some general market disruption over the past year, which included lower plantings and a three-month export ban from Egypt, we have negotiated a contract extension with our grower. Not only does this mean that we can ensure stability in what has been a volatile market recently, but it also helps generate favourable value for our customers.



Sustainability spotlight

The contract extension with our supplier over the winter season will also mean that we can remain in complete British supply through until the spring import window, which is typically around April.

Spring onions

We are halfway through an annual agreement on spring onions. There are only a limited number of growers left in the UK; however, these British growers tend to provide a higher quality and higher specification, more suitable for the demands of the foodservice industry. Typically, overseas supply can

be lower quality, although our supplier has also been very successful in ensuring that throughout the import period, the quality into Fresh Direct remains high.

The British season will run through until October before sourcing switches to overseas, and we will resume British supply in March 2025.



Leeks

We have seen further decline in the number of leek growers in the UK, with only around seven major growing groups remaining. There are even fewer that have the ability to pack and grade to the standards that our customers require.

However, we have contracted leek production during the winter season with a key grower who is growing the majority of the product on their own farms. This will provide us with enhanced stability over the coming season.



Garlic

There are challenges with garlic production, and we have seen some contraction of growing areas, with Spain seeing a reduction of 30% since 2022. Compounding the problem, there have again been poor growing conditions and flooding in China, affecting overall availability. This means that there is likely to be some season-on-season impact on pricing.

Apples and pears

Apples

2023 has been a difficult season, and this is set to continue into the 2024 season, with the World Apple and Pear Association forecasting a decline of more than 11%. Within that, the variety Golden Delicious is set to see a 10.2% decrease and Gala an 11.1% decrease in available volumes.

The biggest impacts on production have included poor blossoming, late frost and hail. For example, the spring frosts across key growing regions including eastern and central Europe mean that early varieties will see a significant reduction in volumes and delays to the start to the season.

Some of these issues are longer term, with Poland, the EU's largest producer of apples, seeing a three-year average decline of 25%. Overall, the EU average is down by 13.6% over the past three years, falling to its lowest level since 2017.

We have also seen the juicing price jump by around 50% over the past couple of years, which is impacting the market more generally, as processors buy higher grades to alleviate shortages. This pushes overall market prices up.

We work with our suppliers to try to avoid the fluctuations that can make planning difficult.

Pears

While pear production is predicted to make a slight recovery this year, EU production remains down by 2.1% on a three-year basis. And at 1.79 million tonnes, it is down by almost a quarter since 2018. Belgium and The Netherlands, two key growing regions for the UK market are down 22.6% and 8.7% respectively. Conference pear is expected to be down 13.5% in total.

EU's 2024 apple harvest to decrease by 11.3%

EU apple forecast production

Source: Fresh Plaza



EU's 2024 pear harvest to grow by 4.9%

EU pear forecast production

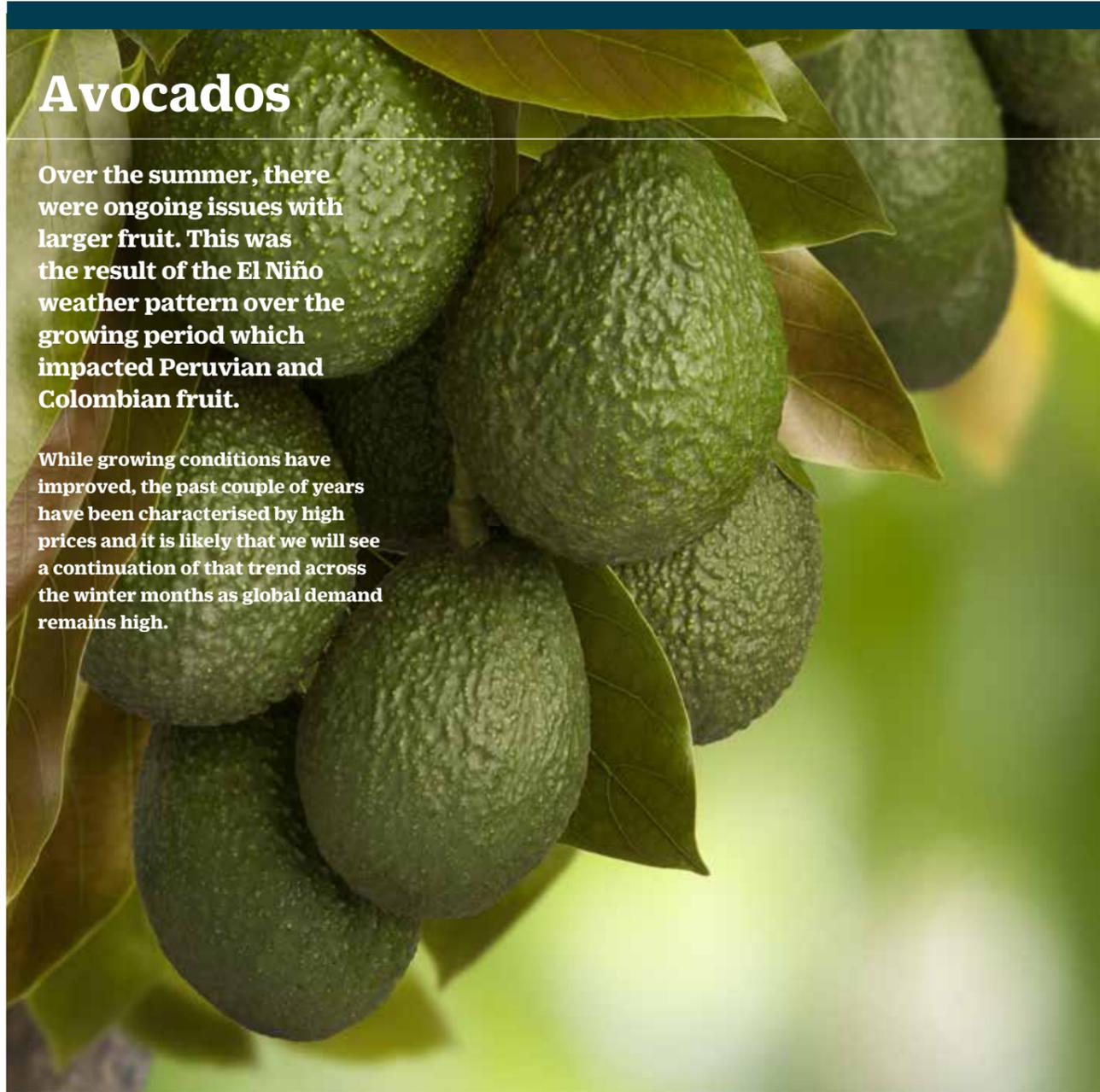
Source: Fresh Plaza



Avocados

Over the summer, there were ongoing issues with larger fruit. This was the result of the El Niño weather pattern over the growing period which impacted Peruvian and Colombian fruit.

While growing conditions have improved, the past couple of years have been characterised by high prices and it is likely that we will see a continuation of that trend across the winter months as global demand remains high.



Chile

We anticipate that the Chilean crop will start around a fortnight ahead of schedule, in September. Although the crop is expected to be up by around 10%, the shortages experienced over the summer mean that there will be huge global demand for the new crop.

With the United States currently paying significantly higher prices than the EU or UK, it is likely that the bulk of the harvest will be sent there. The shorter transportation time and cheaper transportation costs also make the US a more attractive market.

As local demand is also likely to be strong, EU prices are likely to need to reflect the strong American market in order to remain competitive.

We are anticipating that the early start and high demand are likely to lead to a premature finish to the season, which would normally stretch through January into February and require a quicker move into the more expensive Northern Hemisphere.

Mexico

Mexican avocados are popular with American consumers, who are happy to

pay a premium for products from this region, which has resulted in a decline in the volume sent to Europe. With high demand and high prices, we do not expect to see much volume from Mexico being imported into the UK or EU.

Spain

The crop is looking similar to previous years. For a period of time as other origins come through supply is restricted to Spanish produce, which tends to be the most expensive, and we have seen particularly high prices over the past two seasons during this



transition. We are expecting similar this year.

Guatemala & Dominican Republic

While we do not source much produce from these origins, we are expecting the crop to be normal.

Morocco

The Moroccan crop volumes are currently expected to be around 20% up year-on-year, which is promising and should help to alleviate the early finish to the Chilean crop. While it is unlikely that this will have a major

impact on prices, as it is likely to coincide with a period where the market is likely to be challenging, it will at least help availability.

Israel

The geopolitical situation in Israel has led to uncertainty with products from this origin.

We are currently awaiting the first indications about the crop, which will be available around mid-September. Historically, Israel is a big supplier to the EU through February, March and April.



Sustainability spotlight

This year we've launched new, plastic-free packaging for our avocado twin-pack. This is a first for foodservice.



Bananas and pineapples

Unlike many other categories, the weather has been good to banana and pineapple growers, with no major events over the past six months. This means that, although we are heading into a period of naturally lower production, we expect quality to be high.

Our bananas and pineapples are supplied by Chiquita, which sources from farms across South and Central America and, provided the weather remains kind, we anticipate consistent volumes and quality across the winter.



Sustainability spotlight

In March 2021, Chiquita announced its '30 by 30' sustainability programme, which is a major initiative aiming to reduce carbon emissions across its operations by 30% by the end of 2030.

After a thorough review, the Science Based Target initiative (SBTi) approved Chiquita's '30 by 30' sustainability programme and ambitious climate target goals, making it the first global fruit company to be recognised by them.

Supplier focus

Chiquita is one of the world's foremost banana growers, and our successful partnership spans many years. Working with them has given us surety of supply and a superior level of quality that is not available from traders.

Social responsibility is a key area of focus as many of the communities depend on the farms the its farms rely on the local community. Chiquita therefore works closely with local communities, setting up joint activities, as they understand their own priorities best.

Its Notal Reserve has just extended its 20-year protection as a Private Wildlife Refuge in Costa Rica for a further ten years as announced in an executive decree by the local government.

Home to more than 720 plant and 330 animal species, Notal's 257 acres of land are a great example of the impact of biodiversity work. It continues to support and promote awareness by engaging with local communities through environmental communication and action.

Chiquita is also active in trying to grow the overall category, with a number of national advertising campaigns. A great example is the 'Pop by Nature' initiative, which saw the grower partner with Brazilian artist Romero Britto, who created a wonderful pop art sticker collection and other artworks, some of which were used on its annual London bus campaign.

Premium Class Extra fruit

Our long-standing relationship with Chiquita allows us to offer our customers the premium Class Extra fruit.

Smaller tolerance on grading

Fewer peel blemishes

Less latex scarring



Berries

There has been a decline in the number of UK glasshouse strawberry growers despite the UK being the second largest consumer of strawberries in Europe, after Germany, according to The Netherlands Ministry of Foreign Affairs.

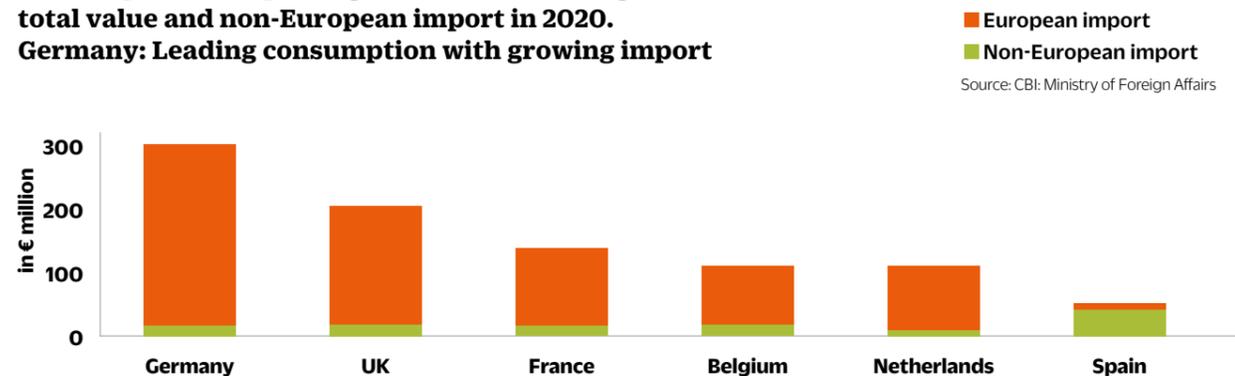
However, this brings with it certain drawbacks. As well as the increased cost of production from The Netherlands, there are also significant quality concerns as the berries are very soft.

Fortunately, this is only for a relatively short period of time before supply moves origin to Moroccan

produce. We have been working with growers to bring forward the crop by experimenting with different locations. As a result, we are now seeing some Moroccan berries by the third week in November, whereas it would previously have been as late as the first week in December. Moroccan supply will be supplemented by some Egyptian produce.

Spanish produce will take over supply at the very end of December. While this is generally good news, we will see some challenges with the very manual nature of the berry harvest, as the cost and availability of labour is increasing across the region.

Most important importing countries according to total value and non-European import in 2020. Germany: Leading consumption with growing import



Supplier spotlight

Our supplier partners at Driscoll's have more than a century's experience behind them and have been a trusted supplier to Fresh Direct over many years.

As a global leader in the berry industry, Driscoll's is renowned for its world-class nurseries, where a blend of all-natural, time-tested practices is combined with cutting-edge modern techniques to develop new, market-leading berry varieties.

We spoke to Jane Faulkner, Senior Account Manager, to reflect on the 2024 berry summer season and share her outlook for 2025.

'The 2024 UK berry season brought its share of challenges with variable weather conditions. Early in the season, cooler and wetter weather delayed the strawberry harvest. Fortunately, a warm spell in June and July helped boost growth, resulting in a bountiful yield of high-quality strawberries and raspberries.'

'However, extreme weather, including heavy rains that raised concerns about flooding, and hot spells that required increased irrigation, added to the challenges growers faced this year. Despite these hurdles, the overall berry quality was excellent.'

Looking ahead to 2025

The 2025 season promises to be one of adaptation and resilience. Growers will need to navigate economic pressures, unpredictable weather and labour challenges. But with innovation and the right support, the UK berry industry is poised to thrive.

Jane adds, **'Several factors will shape 2025. Unpredictable weather patterns may affect both the timing and quality of the berry harvest. Economic pressures and rising production costs,**

particularly for labour, energy and materials, will continue to challenge growers. Labour shortages due to visa restrictions may further impact the availability of British berries.

'With these domestic challenges, more growers are looking to export markets to sustain their businesses. This trend may help balance domestic pricing pressures, though it could reduce the availability of berries in the UK if exports become more lucrative.'

'On a brighter note, advances in agricultural techniques, such as improved berry varieties and more efficient growing practices, could help offset some challenges, leading to higher yields and extended growing seasons.'

Import season outlook

As we transition into the import season, weather patterns remain a concern, especially with the unusual conditions experienced in 2023/2024. Growers must remain vigilant and prepared for any challenges, including water restrictions.



Sustainability spotlight

Our UK growers are 100% LEAF accredited, meaning they dedicate at least 5% of their farm areas to enhancing biodiversity and protecting habitats. Innovation is key, from rainwater harvesting and beneficial insects to integrated pest management and renewable energy, with initiatives like hedgehog protection, nectar-rich flower mixes and bat boxes.

We've made significant strides in sustainability by transitioning all our berry packs to Driscoll's paper packaging, reducing plastic use by up to 92% – saving more than 50 tonnes into Fresh Direct customers annually. This award-winning, FSC-certified packaging was recognised with two accolades at the Grocer's New Product and Packaging Awards 2023.

Import season transition dates

Strawberries: Transition begins in November, starting with Dutch and moving to Moroccan/Spanish supply.

Raspberries: Transition begins mid-October, with produce from Morocco, followed by Spain and Portugal.

Blackberries: Transition begins mid-October, with supply from South Africa, Portugal and Morocco.

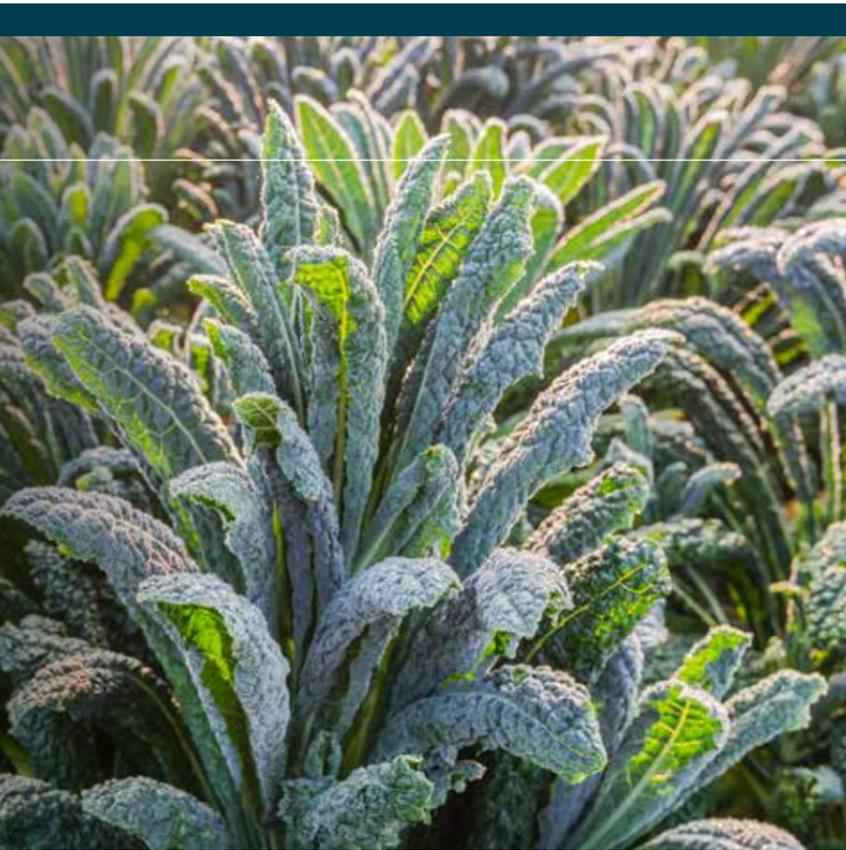
Blueberries: Transition begins in September, with produce from Peru and Morocco.



Brassicas

The past year has seen a variety of challenges impacting the brassica category. One of the key issues has been labour costs, which continue to increase – attracting people is becoming more difficult, with alternative, more appealing job options increasingly available.

Weather has also adversely affected the category, severely impacting availability across most varieties.



Cauliflower

The impact of the weather on cauliflower over the past couple of years has become increasingly problematic, to the extent that reliance on a British crop through the winter is no longer practical or providing sufficient reassurance and alternative sourcing origins are required to maintain availability.

Even within the UK there are significant variations, with certain regions performing better than others. For example, Cornwall was particularly badly affected by the weather conditions over the summer season.

In response to several years of challenging availability, we aim to remove some of the volatility by introducing a proportion of imported products to support British producers through the winter months. These will come from Spain, where we have resources on the ground which is helping build and maintain relationships with growers.

Cabbage

It has been a better season overall for white and red cabbage, even though we have seen some issues towards the end of the season with a loss of yield with stored product.

For the winter, from September to February, we will return to open fields. After that, we will once again be using stored product, which brings with it some risk both in terms of quality and availability.

Through the winter, red and white cabbage will be coming from the UK. This will be the same for spring greens, which will be grown in Lincolnshire.

With savoy cabbage, we have again reacted to recent availability issues and included some additional imported product from April, ahead of the usual May import period.

We are also increasing the number of sweetheart variety suppliers to three to ensure continuity of supply,

particularly during the import period of April and May.

Broccoli

We will be working with more growers in 2024/2025, doubling the number we used last year. This will also expand the geographic spread to ensure that we mitigate any potential weather-related issues.

This completes a strategic shift from using an agent to direct supply from farms.

Cavolo nero

Last year, cavolo nero was due to be sourced from Spain, but problems with whitefly meant that we had to move supply to Italy to cover. With so few farmers growing this product, any problems are intensified as it becomes very difficult to cover demand at short notice.

We are therefore contracting supply from both Spain and Italy.

Citrus



Lemons

Last year's concerns about the impact of the Spanish water shortages on the lemon harvest were ultimately unfounded and the crop outperformed expectations. In fact, it ended up being a particularly bountiful crop.

Expectations are for the crop to be down year-on-year, but this will be more in line with a traditional crop. However, it is expected to be a challenging transition between origins as the market moves from South Africa into the Spanish season around October.

While it is normal for that period to be challenging, it is expected to be particularly difficult this year. We have been working with our suppliers and will make the move to Spain later

than the general market in November. This will help us to avoid most of the early season disruption and maintain a better supply over the transition period.

New product update

The introduction of large lemons this year has been very successful and, as a result, we will be introducing a larger-sized pack into the Fresh Direct range.

Limes

Climate challenges in South and Central America have made the lime market very volatile, however we have seen stability in our supply, which is expected to continue with our existing long-term partnership with avocado growers Westfalia.

As well as Brazilian supply, we will supplement this with produce from Honduras as and when it is required. This gives us increased surety of supply.

Oranges

Weather challenges in the southern hemisphere along with an increasingly short juice market has made this summer very difficult. Sourcing from multiple regions and countries has enabled minimal disruption to our supply, despite a particularly challenging summer.

The seasonal switch to northern hemisphere crop is expected to also be challenging, with Spain expecting lower yields. Northern hemisphere supply does however bring more stability, particularly from the New Year when the Egyptian season begins.

Exotic vegetables



During the winter, Fresh Direct will be sourcing fine beans, sugarsnap peas and mangetout from Zimbabwe and Kenya.

Weather challenges earlier this year due to a cyclone in Kenya badly affected availability, destroying around 10% of the crop, so we will be extending the number of permanent countries of origin from which we can source to include Zimbabwean crop, which will better protect

availability. This gives us more opportunity to mitigate risk caused by unforeseen weather challenges should it be required.

Labour costs continue to be an issue, with minimum wage rises particularly affecting peas and beans. Both peas and beans require manual processing before packaging, which includes topping and tailing. This is compounded by local packing in a challenging labour market. This is driving marginal price increases.



Tenderstem® broccoli

We will continue to source the majority of our Tenderstem® broccoli from Kenya and Spain along with the UK over the winter season.

Following the growing challenges in Spain, with significant hailstorms, and Kenya, with its cyclone, we have increased our permanent sourcing portfolio to also include Portuguese and Dutch supply to mitigate the risk to product availability.

In a boost to productivity, we are expecting to see additional supply of Tenderstem® broccoli in mid-2025, as more seed and product licences are released. This will help to meet the increased demand for this popular product.



Ginger

We are seeing more competitive pricing on ginger, following some very difficult growing conditions in 2023. The poor weather and flooding in China saw exports decline, but the market has now stabilised, and greater availability has returned.



Asparagus

Asparagus has been heavily impacted by the El Niño and La Niña weather conditions, which have affected crop availability and seen prices rise significantly. In order to mitigate issues moving forward, we are extending the number of countries of origin that we use, potentially introducing Namibia, South Africa and Argentina as alternatives to the key growing areas.

The issues that the industry experienced with the *Prodiplosis longifila* Gagné worm, which is not new or a risk to humans, are receding. The UK's Animal and Plant Health Agency (APHA) was enforcing the crop's

destruction if it was found, with the grower no longer able to send product until they could demonstrate that they are taking measures to ensure that the worms are not present. As a result, many Peruvian growers were favouring the less risky American and EU markets rather than exporting to the UK, a more pragmatic approach to enforcement is being taken.

Moving forward, we expect to have early season British asparagus available around March or April 2025, albeit supplies are generally limited and more expensive for early season crop.

Look out for our new fine asparagus, which we have launched this year.



Sustainability spotlight: Barfoots

Fresh Direct has partnered with Barfoots for a few years now, but its story begins much earlier in 1976, when Peter Barfoot, a fifth-generation farmer, started growing a single crop in the unique micro-climate of the Hampshire Basin.

Since then, the company's philosophy has remained the same... look after the land as if you want to farm forever, making it the perfect partner for Fresh Direct.

Sustainability has played a big part in the company establishing strategic hubs in Spain, Senegal and Peru, allowing it to maximise access to sea and land routes. This pioneering sea freight model has drastically reduced its carbon footprint.

Alongside the hubs, the company recognises its responsibilities in supporting growers across the world and has been proactive in developing fantastic initiatives that focus on environmental, social and economic sustainability, including

building schools and providing medical care.

On the farm, the company's focus is on the efficient use of resources, improving soil health, encouraging biodiversity and reducing synthetic inputs and habitat regeneration. Barfoots has been converting its veggie waste to electricity and has been self-sufficient in the UK since 2010. And a water treatment plant converts waste water to irrigation water to help grow the next crop.

Grapes

We're in the second year of a new relationship with a specialist cooperative grape grower, with direct global relationships.



This is helping to provide additional surety of supply, and we are also benefiting from better-quality products.

Over the winter we will be sourcing from a variety of origins before moving to South Africa in January.

There is naturally an increase in transportation costs as we transition to Southern Hemisphere supply which is in line with the general market.

Our new relationship is also allowing us to introduce new products in a category that does not normally see

much innovation, including Cotton Candy grapes, a sweet grape that is perfect for encouraging healthy consumption among children, and Sable grapes, a dark black grape with a deeply tropical flavour.

Herbs

We are increasing the level of herbs that are being vertically grown in the UK this year.

We have identified and are working with three key vertical growing partners covering a range of herbs, salad and baby leaves. They are helping us to provide a growing proportion of year-round British produce; for example, we are currently growing 40% of our basil in vertical farms and we will be increasing this to around 60% this winter.

This is helping to address food security concerns and weather-related issues with harvests that have caused significant challenges for conventional growers over the past few years and compliments steps we are taking on other products to reduce risk to our supply chain, such as chives.

As well as the growing benefits, we have been delighted with the quality of the products. Development chefs have rigorously tested the new products and found that, as well

as the sustainability benefits, the produce significantly outperformed conventional leaves for quality and freshness.

As an early adopter of this technology within foodservice, we are not only supporting British agriculture, but our deepening relationship with vertical growers is also producing a year-round solution with enviable quality.



Sustainability spotlight

The latest supplier to partner with Fresh Direct is certified B Corp GrowUp, which produces salad leaves at its modern vertical farm in Sandwich, Kent, designed to reduce its carbon emissions. The farm is powered by renewable energy from the bioenergy plant next to the facility.

Lettuce and leaf

We are continuing to source our baby leaf from Italy, where we have a successful, long-term supply partnership.

While this summer has provided some challenging growing conditions, the heat-related problems will ease over the winter and we have been working with suppliers on a project to maximise availability, product quality and freshness.

With whole-head lettuce, the main source of supply over the winter is Spain, where we will see the normal seasonal increase in price.

Labour continues to be an issue for lettuce and leaf, in terms of both general availability and cost. This is having a significant impact on input costs for growers. Water supply is also a major potential problem for the region, as we

have seen over the past couple of years, notably with the planting ban last year.

In order to mitigate the risk, we will be working directly with a number of new growers. We have a dedicated resource in Spain, which is helping to build positive partnerships and open up new sources of supply.

With the issues we saw across Spain last year, we introduced additional supply of iceberg lettuce from Egypt. The quality and service were excellent, and we will continue with the relationship this year.

Celery

Our long-term relationship with our celery grower has meant that we have been able to maintain very competitive pricing as supply moves from Britain to Spain in November. It will then remain Spanish until June, as usual.

Chinese brassica

Chinese brassica, which includes pak choi, will continue to come from Spain over the winter.

We are expecting to see a reduction in volumes of red chicory, as less of it is being grown. Chicory and other smaller-volume categories like Chinese leaf are expected to see price rises.

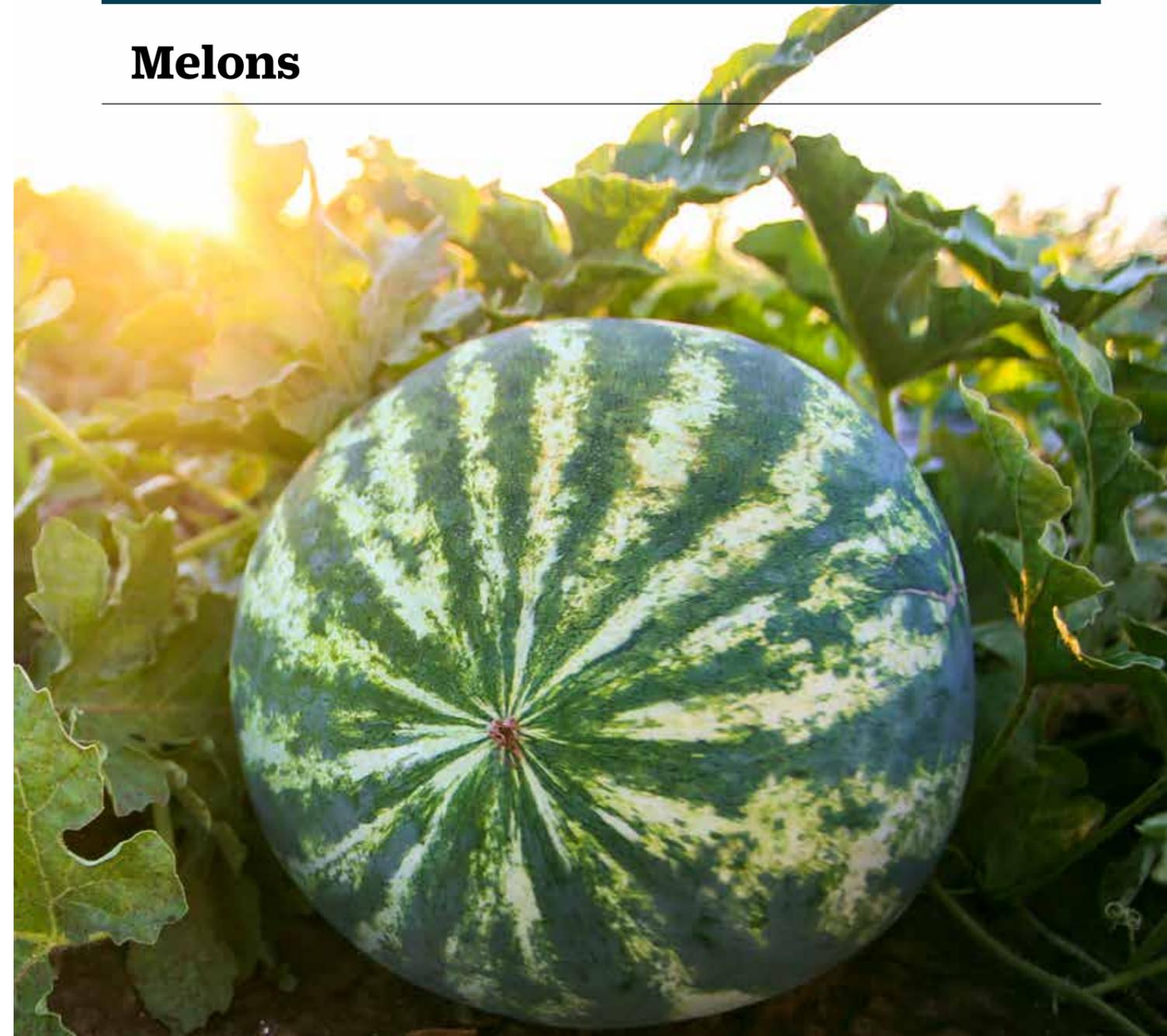
Prepped leaf

We are continuing to work with our long-term supply partner, helping to provide an extensive range of prepped leaf, with industry-leading choice. Year-on-year, we expect pricing to remain relatively stable.

This year, we will be sourcing from a number of European origins including France, Italy, Spain and Germany, which will help spread the risk and ensure good continuity of supply across the winter season.



Melons



Shipping from South and Central America remains an issue, due in the main to displacement of vessels, as issues across the Red Sea, coupled with an increase in storm-related delays, have impacted delivery times and increased transport costs.

However, this has not unduly impacted the overall category, and we are expecting it to be on a par with last year. As is normal when we move from Europe to the Southern Hemisphere, we are seeing seasonal increases on melons. The greatest percentage impact is likely to be seen on Galia, which, as a cheaper melon, is disproportionately affected by the increased transportation costs.

While some producers have experienced heavy rain which

has affected the growth of their crop, the growers that we are using have managed to avoid the worst of the weather. Similarly, El Niño, which had a big impact on production last year, is not expected to exert the same level of influence over crop production.

We are expecting some more positive news with Honeydew, where costs have marginally decreased both year-on-year and season-on-season.

Mushrooms



We are seeing mushrooms grow in popularity, as foodservice businesses look for alternatives to centre-of-plate proteins to meet the demand for plant-based foods.

We currently source from three key growers, keeping a geographical spread across Europe, with British, Irish and Polish producers. This helps us to manage challenges in individual origins, such as the heat-related issues we saw in Poland over the summer. With long-term annual contracts in place, we can work with our suppliers to provide consistency of supply and competitive pricing.

The mushroom category remains a very manual operation, relying on a declining pool of operatives. Markets such as Poland have seen an influx of investment in IT-related industries, which offer an attractive alternative to more traditional agricultural enterprises. This has meant that growers have had to look further afield for labour, often needing to bring personnel from outside of the EU, with the increased costs and challenges that brings.

New products

Mushroom innovation has been a key focus area within Fresh Direct over the past couple of years, helping to support demand within the sector. This autumn is no different, and we

are introducing two new products, Mushroom Scallops and Baby King Oysters, both of which have performed well in our development kitchens, with our chefs showcasing how Baby King Oysters can make a fantastic alternative to something like salt and pepper squid when deep-fried with cornflour, salt, pepper and chilli.



Potatoes

The past two seasons have been very challenging for British potato farmers, with growing and harvesting conditions incredibly difficult. The 2023/2024 season saw weather conditions and flooding which caused around a quarter of the crop to never be lifted (harvested).

As well as creating a severe shortage of potatoes, recent years have also badly affected grower confidence, which was already fragile as a result of problematic harvests and low returns in the industry. The situation is not unique to the UK, with Europe also suffering a very poor harvest, compounding long-term declines across the region. In fact, Eurostat recently reported that the 2023 harvest across the EU was 37% less than in 2000.*

With potatoes in short supply and market prices high, many farmers are hesitant to sign contracts, with the belief that the market will remain short and that they will command a better return by selling on the open market.

We are continuing to work with our long-term supply partners, which has helped us navigate some of the worst challenges of the past couple of years. It is helpful that the better summer weather has meant that cereals have been harvested in good time this season, which should allow farmers to concentrate on lifting potatoes earlier.

The 2024/2025 season is well underway and providing some respite from the recent shortages, although demand remains very strong, while supply has not yet caught up. We anticipate that this season will remain challenging, with plantings at a similar level to last year, and the lack of seed potato causing some concerns about the quality of the crop.

This lack of seed potatoes, due in part to these being sold to cover the shortfall in potatoes last year, has seen many farmers relying on salad or other small potatoes to plant, which are not designed for this purpose.

With the early crop showing inconsistent yields, we are expecting this year to remain challenging. It is

unlikely that we will know the full extent of the outlook for this season until November, once the majority of the crop has been lifted.

There are particular concerns about salad (or mid) potatoes, where overall demand has grown significantly but supply remains static. This is a relatively specialist potato and is more difficult to grow so will be more challenging to cover.

Without the severe heatwaves we saw last summer, European growing conditions have improved. We will continue to watch continental yields closely as they could provide some respite for the market.

Share of EU potato production, 2023



The 48.3 million tonnes of potatoes harvested across the EU in 2023 was just over one third less (-36.7%) less than in 2000.

Source: Eurostat

Prepped vegetables



The most popular product of this extensive category is root veg. As these are sourced in a similar way to the whole-head varieties, they have been subject to many of the same issues that have been seen across the sector, including weather-related shortages and problems with quality.

Other products that make up the category include alliums, mix coleslaws, brassicas, mixed veg, sweet potatoes, and salad veg and other

(mushroom, butternut, ginger), which also face the same issues as standard produce.

As more caterers look to prepared products to help solve issues in professional kitchens, we are constantly seeking to extend the portfolio of products and different preparation methods. Product innovation is key to this, and we are pleased to be launching FreshLock® Cobettes, a sister product to the popular Sweetcorn Ribs, this autumn.



Sustainability spotlight

The FreshLock® packaging helps extend shelf life by up to ten times, helping reduce food waste. It's also processed in a carbon neutral factory powered by waste.

Root vegetables

There were some very challenging conditions for growers as they planted the new season crop, with drilling proving difficult due to flooded fields. However, the recent weather has helped the crop to catch up and, while we are not expecting a good harvest, yields are expected to be satisfactory.

Parsnips

Parsnips were particularly challenging in 2024, with very little product available following the premature end to the UK season before imported product was ready.

Following the challenges of last year, we have moved to a new supplier, who helped support the business through the shortages, which meant that we were able to minimise the impact as far as we could.

Carrots

We have a very long-standing relationship with our main carrot grower, Freshgro, who we have worked with for more than ten years. This is helping to deliver consistent supply in what has been a difficult season for growers.



Sustainability spotlight

Working with Fresh Direct brings with it an expectation that suppliers will actively seek to reduce their impact on the environment.

Fresh Direct's partnership with Freshgro has lasted for over ten years with them supplying excellent quality root veg, and it is no surprise that our two companies share a passion for sustainability.

Central to the sustainability journey has been reducing energy usage from field to the factory, where wind turbines and solar power create more energy than it requires to run it. In addition, it has focused on reducing food miles and improving the efficiency of the transport network.

Working with agronomists to improve the quality of the Chantenay makes these carrots easier to cook and increases yields and availability.

Part of this process is about ensuring good growing conditions and developing robust soil with biological activity to get the best balance of nutrients for proper plant growth, with minimal soil disturbance. This is in addition to water conservation planning and waste reduction programmes. Freshgro also uses integrated pest management systems to ensure that there is the least possible disruption to agro-ecosystems while encouraging natural pest control.

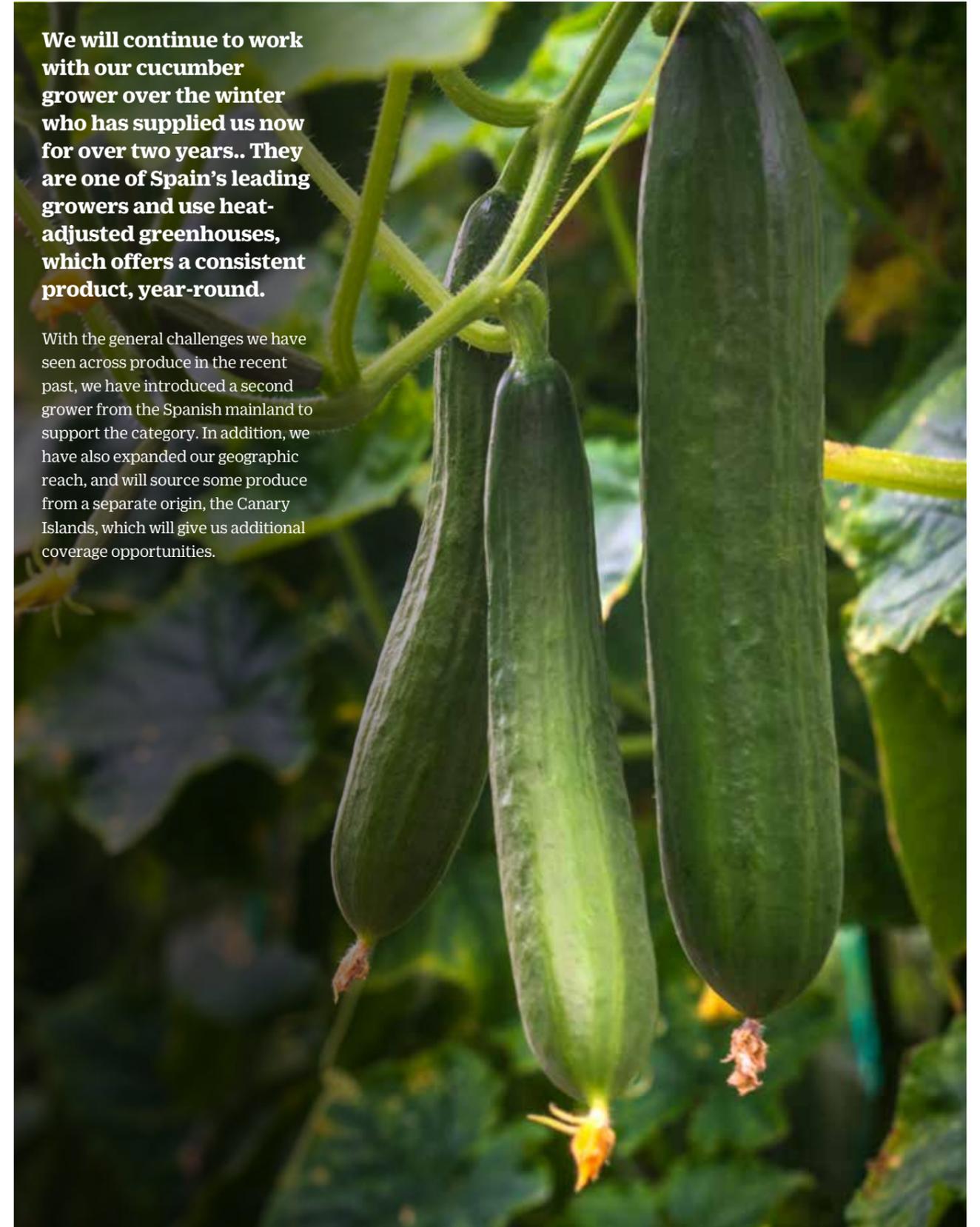
Salad



Cucumbers

We will continue to work with our cucumber grower over the winter who has supplied us now for over two years.. They are one of Spain's leading growers and use heat-adjusted greenhouses, which offers a consistent product, year-round.

With the general challenges we have seen across produce in the recent past, we have introduced a second grower from the Spanish mainland to support the category. In addition, we have also expanded our geographic reach, and will source some produce from a separate origin, the Canary Islands, which will give us additional coverage opportunities.



Tomatoes

While our suppliers have managed the post-Brexit challenges well, the long-term impacts of the UK's departure from the European Union are continuing to be seen. The UK market is increasingly being seen as a less attractive option, with post Brexit rules meaning that backhauling is increasingly challenging, making other EU destinations a simpler option to sell produce to.

The additional costs and administrative burden also mean that many suppliers simply see the UK market as too difficult.

In order to mitigate the challenges, we have built a relationship with a haulier, JCARRION, which has been delivering significant benefits. This allows us to source from a wider pool of growers, with the ability to take smaller quantities on a regular basis, consolidating loads, so that we minimise food miles. And because JCARRION has backhauling agreements in place, we can maximise efficiencies across the supply chain.

In terms of overall market supply, there has been a reduction in tomato production in Spain, while Morocco has seen an increase in volumes. However, we remain committed to Spanish produce, including from the Canary Islands, as we believe that it delivers a better consistency and the additional quality that comes from the experience of the remaining growers.

Beef tomatoes

Last year, we trialled beef tomatoes from Egypt through the challenging March and April period. This proved successful, as we were able to maintain quality during the spring period, which is when Moroccan produce typically deteriorates.

While we intend to continue with further Egyptian supply, we are also taking additional steps to mitigate risk by increasing volumes from Spain, where we will work directly with a grower to source additional produce direct from the farm.

Round tomatoes

We made the decision to significantly increase the amount of produce we source from the Canary Islands last year, after consecutive years of restrictions and challenges, particularly with Moroccan fruit.

This has worked well, and we will therefore continue to focus on the Canary Islands as a source region. Part of the appeal of the Canaries is its temperate climate, which supports excellent tomato growing.

We will supplement this with Spanish produce and some fixed volumes from Morocco, which provides a number of origins and allows us to mitigate risk in a category that has seen some volatility of supply over recent years.

Cherry vine tomatoes

Tomato virus remains an issue for cherry vine tomatoes. The increase in virus has been partly driven by the excessive temperatures of the past couple of seasons, which has impacted the quality of the crop and also increased the prevalence of pests.

We are working with suppliers to increase the use of virus-resistant varieties, and our suppliers have active programmes to reduce the impact on crop harvests.

Cherry tomatoes

Our relationship with JCARRION is allowing us to work with more Spanish growers. We have therefore been able to increase the volumes we are taking from Spain, reducing the potential risk to supply by spreading this among additional growers, but also reducing the length of the supply chain and enjoying a higher-quality end product.

We'll also be taking some yellow cherry tomatoes and heirloom tomatoes from one of Spain's premium tomato growers, which helps deliver top-quality produce outside of the British season to supplement Fresh Direct's Isle of Wight Tomatoes premium range.

This summer has seen some exceptional sales from our premium British supplier, Isle of Wight Tomatoes. This will see us increasing additional new products in 2025.



Sustainability spotlight

Isle of Wight Tomatoes encourages native bumblebees to pollinate 40 varieties of tomato across 27 hectares of glasshouses, using a closed-loop biodegradable system. This means all crop waste is recycled to enrich the organic soil.

Aubergines and courgettes

We've introduced a new supplier for aubergines and courgettes. This follows our strategic plan to get closer to the grower. The new Spanish supplier will begin to supply in September, which is the traditional start to the courgette season, and will support the transition to that region.

The specialist grower of courgettes and aubergines provides high-quality produce and will deliver a complementary service to our other, more established supplier partner in this category.



Peppers

We have identified some challenges to the quality of peppers towards the end of last season, so we have taken steps to address that by turning to one of Spain's largest growers, Agroponiente.

Based in the Almeria region of Spain, the company's facilities are first class, and they have the growing, grading and packing processes in place to ensure a good-quality crop across both Class 1 and Class 2 peppers.

We will also be using two other Spanish growers to maximise quality

and availability, also from the Almeria region, which is a popular growing region for peppers in Spain.

We will be supplementing with supply from the UK and Morocco, which will provide some cover should the Spanish crop not be as plentiful as expected.



Spotlight on Agroponiente and sustainability

Our new pepper grower, Agroponiente, is responsible for more than 3,500 hectares of fruit and vegetable production.

As well as producing high-quality produce, the company has its eyes firmly on sustainability. Over the past four years, this key Spanish grower has reduced water usage by almost 75%, reduced electricity by around 30% and reduced its carbon footprint by almost 70%. It has also made positive strides in reducing food waste, using recyclable packaging and the introduction of aluminium-free labels.

Dairy

The season started poorly, with the wet weather from autumn last year through to spring this year meaning that farmers missed the Spring Flush as they were unable to turn out their cows. However, recent weeks have seen more favourable weather that has boosted grass growth and quality.

Lower production has also seen farmgate prices continue to rise. This has meant that the early season declines in production have not been sustained and there was only a marginal 0.3% decline in July. With this, we are predicting a more stable market through to the early part of next year.

Farmers will be watching the weather carefully over the coming months as they seek quality forage and good grass cover over the autumn. There are concerns that any increase in feed costs could

reduce positive sentiment. And farm margins could come under increased pressure later in the year as the impact of the poor weather on silage quality could be realised.

There have been some significant recent increases in the cream market – the result of a very volatile market. However, we are expecting this to stabilise over the next couple of months, before falling off again into 2025. With the market volatility we have seen, this could easily change again.

In addition, there are currently low stocks of butter in the UK, as poorer returns have made it less attractive to producers. The need for producers to replenish depleted stocks is putting more pressure on available raw material. Butter prices are expected to peak in October, but this is a volatile market and there could be further disruption.

There is also volatility in the cheese market, where we have seen some rising demand.

Eggs



The egg market remains tight as demand continues to rise, with retail sales up by almost 4% in 2024.

Flock numbers have continued their recovery and are estimated to be back up to more than 40million following the challenges of the past couple of years, where low returns affected farmer confidence, compounded by loss of flock numbers due to avian influenza. However, the UK national flock remains well below its peak.

Challenges over planning permission are adding additional problems should farmers wish to expand or enter the sector. It has been slightly better news on feed costs, which have stabilised after rising for an extended period. However, they remain significantly higher than earlier in the year.

Avian influenza

The industry is watching developments across Europe closely as we approach the new 'season' and the high-risk autumn period.

With the widespread commitment of wholesalers and retailers to cage-free eggs by the end of 2025, we expect to see further pressure on market availability of free range as we approach the deadline.

All our eggs are British and meet British Lion standards, which means that they are approved by the Food Standards Agency for vulnerable groups such as pregnant women or the elderly to be eaten 'runny'.

Fresh fish and seafood

An update from M&J Fresh Seafood...As we move into the winter season, fishing off the British coast becomes more challenging. Poor weather makes it more difficult for day boats to head out to sea and overall yields drop as a result.

While fishing may be more problematic, there are still some wonderful seasonal fish on offer.



Top five fish species – detailed view, seasonality impact

- £ Good price
- £ Average price
- £ High price
- 🐟 Good availability
- 🐟 Varied availability
- 🐟 Poor availability



£ **Cod:** Best prices from February into March, with worst prices in October and January.
🐟 **Alternative:** Haddock



£ **Haddock:** Best prices in March and October, with worst prices in February, September and December.
🐟 **Alternative:** Cod



£ **Farmed seabass:** Best prices in September through October.
🐟 **Alternative:** Gilt-head bream



£ **Hake:** Best prices in February through to March, with worst prices October through to January.
🐟 **Alternative:** Large cod



£ **Salmon:** Best prices in September, with worst prices starting late December.
🐟 **Alternative:** Sea trout

Flat fish

Flat fish are especially good at this time of year, up to late November, as they typically plump up towards roe time. While prices do rise around this time of year, in line with the more difficult fishing conditions, there are still some good-value flat fish available, such as meagre. After November, quality begins to decline, and alternatives such as halibut or turbot become a viable solution on menus.

Plaice and Dover sole

Plaice and Dover sole are two flat fish that have been affected by changes to the MCS ratings that were released in August. By monitoring closely, our goal is to source fish that are rated MCS 1 to 3, and we regularly move between fishing grounds and species to ensure that we are sourcing the most sustainable fish available.

We are able to continue to source plaice and Dover sole by moving to other British fishing grounds, while still supporting our MCS goals.

Our specialist procurement team do not source any fish rated MCS 5.

Ray and skate

Other species seeing changes in MCS ratings are rays. We focus on thornback rays, which have a particularly good MCS rating, especially when landed in the Irish Sea, Bristol Channel and Celtic Sea North. As ratings vary from catch area to catch area, we continue to be vigilant and avoid areas like the English

Channel West which has a higher MCS rating.

We also supply two other key ray species, blonde and spotted.

Lobster

Through September, we will transition away from native lobster to Canadian lobster, and although there is little difference in the quality and taste, prices do rise with additional costs including transatlantic transportation.

Mackerel

Also approaching the end of the season are wonderful Scottish mackerel. From October, we will start to source from much further south, in the warmer waters off the coast of France and Spain as the fish migrate.

Mussels and scallops

With the colder winter waters, mussels offer a very good protein, with great meat quality and a good size. Another of the mollusc family, the free-swimming scallop is also very good at this time of year. We source from Japan, which allows us to use MSC certified products. Our Japanese scallop producers work on a four-year cycle, moving every year to allow the area to fully recover before returning. The careful management of stock leads to a better-quality and more uniform product

There have been some concerns recently about the handling of live shellfish, so we ensure that all of our fish are treated in accordance with or

greater than specified by the Seafood Code of Practice for handling and dispatching of live shellfish.

White fish

September sees the start of new quotas for white fish, which usually reverses the August challenge of low availability and high prices.

This year, new scientific advice will mean a reduction of 30% on the Barents Sea cod quota for 2025. This follows three consecutive annual reductions of 20%, meaning that the quota is the lowest allowable catch in more than two decades. Given the importance of the Barents Sea, this will have a significant impact on the entire market. How that looks will depend on the how fishermen approach the quota across the season, with the potential to spread it out or to fish early when stocks are plentiful.

Haddock is generally a good alternative, although the reduction in the cod catch could affect price and availability. Our supply is MSC certified and mainly comes from Icelandic waters and is line caught by day boats.

Salmon

We see the new generation of salmon from June leading to September, which is typically the lowest price during the year. However, as the price drops, processors of frozen and smoked fish tend to enter the market, which reduces availability and starts the cycle of price inflation until the next year.



What's in season



Fresh fish and seafood seasonality calendar

■ Good availability ■ Difficult availability £ Best price
■ Varying availability ■ Not available Q Good quality

Fish	J	F	M	A	M	J	J	A	S	O	N	D
Amberjack (yellow tail)												
Black Bream												
Brill	£			Q	Q	Q	Q	Q				
Clams - Manila	Q	Q	Q						Q	Q	Q	Q
Clams - Razors	Q	Q	Q						Q	Q	Q	Q
Cockles	Q	Q	Q						Q	Q	Q	Q
Cod			£		£							
Skrei Cod		£	£									
Coley			£	£	£							
Crab - Brown										Q		
Cuttlefish												
Dover Sole				£	£							
Gilt Head Bream - Farmed												
Grey Mullet												
Gurnard												
Haddock			£		£							
Hake		£	£			£	£					
Halibut - Farmed												
Herring												
John Dory												
Lemon Sole				£	£							
Lobster - Canadian					£	£						
Lobster - Native							£	£	£			
Mackerel						£/Q	£/Q	£/Q				
Meagre - Farmed												

Fish	J	F	M	A	M	J	J	A	S	O	N	D
Megrim				£	£							
Monkfish							£	£	£	£		
Mussels	Q	Q	Q							Q	Q	Q
Oysters - Native												
Oysters - Rock												
Plaice				£	£	£	£	£	£			
Pollock	£	£										
Ray - Thornback, Spotted												
Red Mullet - European												
Red Mullet - Exotic												
Salmon - Farmed												
Sardines - Cornish	£	£								£	£	£
Scallops - UK Waters (Roeless)												
Scallops - Import (Roeless)									£			
Sea Bass - Farmed												
Wild Sea Bass												
Sea Trout - Loch Sea Reared												
Squid - European												
Swordfish												
Rainbow Trout - Farmed												
Tuna												
Turbot - Farmed												
Turbot - Wild												
Whiting												
Witch												

Fresh produce seasonality calendar

Alliums	J	F	M	A	M	J	J	A	S	O	N	D
Diced Shallots												
Garlic												
Leeks												
Onion Red												
Onion White												
Shallots												
Sliced Spring Onion												
Spring Onion												
Baby Vegetables	J	F	M	A	M	J	J	A	S	O	N	D
Carrot												
Leek												
Courgette												
Beetroot												
Parsnip												
Corn												
Berries	J	F	M	A	M	J	J	A	S	O	N	D
Blackberries												
Blueberries												
Blueberry Snack Pot												
Cranberries												
Raspberries												
Red Currants												
Strawberries												
Strawberry Snack Pot												
Brassicas	J	F	M	A	M	J	J	A	S	O	N	D
Broccoli												
Cabbage Red												
Cabbage Savoy												
Cabbage Spring Green												
Cabbage White												
Cauliflower												
CauliShoots*												
Cavolo Nero												
Hispi (Pointed/Sweetheart)												
Kale												
Pak Choi												
Purple Sprouting Broccoli												
Romanesco												
Shredded Kale												
Shredded Red Cabbage												
Shredded Savoy Cabbage												
Shredded White Cabbage												
Sprouts												
Tenderstem* Broccoli												
Tenderstem* Broccoli Tips												
Citrus	J	F	M	A	M	J	J	A	S	O	N	D
Easy Peelers												
Grapefruit												
Large Easy Peelers												
Large Lemon												
Lemons												
Limes												
Oranges												
Chillies	J	F	M	A	M	J	J	A	S	O	N	D
Green & Red												
Scotch Bonnet												
Padron												
Jalapeno												

Exotic Fruit	J	F	M	A	M	J	J	A	S	O	N	D
Bananas												
Coconuts												
Dates												
Figs												
Kiwi												
Mangoes												
Papayas												
Passion fruit												
Physalis												
Pineapples												
Pitahayas (Dragon fruit)												
Plantains												
Pomegranates												
Exotic Vegetables	J	F	M	A	M	J	J	A	S	O	N	D
Asparagus Green												
Asparagus Purple												
Asparagus White												
Fennel												
Fine Beans												
Ginger												
Globe Artichoke												
Jerusalem Artichoke												
Lemongrass												
Mangetout												
Mooli												
Okra												
Rhubarb Forced												
Rhubarb Outdoor												
Sugar Snap Peas												
Sweetcorn												
Grapes	J	F	M	A	M	J	J	A	S	O	N	D
Red												
White												
Herbs/ Cresses/Shoots	J	F	M	A	M	J	J	A	S	O	N	D
Basil												
Chives												
Coriander												
Curley Parsley												
Flat Parsley												
Dill												
Mint												
Rosemary												
Thyme												
Potted Herbs												
Edible Herbs												
Micro Herbs												
Samphire												
Bean Sprouts												
Growing/Living Cress												
Pea Shoots												

UK availability - good
UK availability - varying

Imported
Not available



Lettuce/Leaf	J	F	M	A	M	J	J	A	S	O	N	D
Asian-Inspired Micro Leaf Mix												
Baby Red Chard												
Baby Watercress												
Celery												
Chicory/Endive												
Chinese Leaf												
Cos												
Curly Endive/Frise												
Iceberg												
Lamb/Mache												
Little Gem												
Lollo Biondi												
Lollo Rosso												
Micro Rocket Wasabi												
Oak Leaf												
Petite Leaf Mix												
Radicchio												
Rocket												
Round/Butterhead												
Sunflower Shoots												
The Shoot Mix												
Watercress												
Melons	J	F	M	A	M	J	J	A	S	O	N	D
Galia												
Honeydew												
Orange Flesh												
Watermelon												
Piel de Sapo Melon												
Mushrooms	J	F	M	A	M	J	J	A	S	O	N	D
Button												
Catering												
Cup												
Exotic Mix												
Flat												
Foraged Mushroom Meat												
Foraged Shredded Mushroom Meat												
King Oyster												
Large Portobello												
Maitake												
Oyster												
Paris Brown/ Chestnut												
Portobello												
Shiitake												
Shimeji												
Wild Mix												
Root Vegetables	J	F	M	A	M	J	J	A	S	O	N	D
Beetroot Candy												
Beetroot Golden												
Beetroot Red												
Carrot Chantenay												
Carrot Chantenay Coloured												
Carrot Heritage												
Carrot Standard												
Celeriac												
Chef's Choice Chipping and Roasting Potato												
Diced Root Vegetable Mix (Leeks, Carrots & Onions)												

Freshlock* Baked Potato												
Horseradish												
Parsnip												
Potatoes												
Salsify												
Swede												
Turnip												
Salad	J	F	M	A	M	J	J	A	S	O	N	D
Aubergine												
Baby Cucumbers												
British Isle of Wight Padrón Pepper												
British Isle of Wight Piccolo Tomato												
British Isle of Wight Premium Beef Tomato												
British Isle of Wight Striped Aubergine												
Cucumber												
Peppers												
Radish												
Spinach												
Sweetbite Peppers												
Tomatoes Beef												
Tomatoes Cherry												
Tomatoes Heirloom												
Tomatoes Piccolo												
Tomatoes Plum												
Tomatoes Round												
Tomatoes Vine												

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