

Crop Report

Wednesday 14th October to Wednesday 21st October

Get the insight you need to plan more effectively and manage your menus with our latest report from the field, brought to you by our expert produce team.

Focus on Potatoes



This year's potato crop is shaping up to be one of the most difficult in recent years. Poor summer growing conditions, particularly the lack of water, meant crops did not reach the sizes normally expected. Extreme heat also caused canopy die off, and once the canopy is lost the plant stops growing, so any remaining unlifted crop will not increase in size.

While some areas did receive late rainfall, the benefit was minimal and came too late for most crops, which were already past the point of recovery. As a result, the largest sizes, baker 40s and 50s, will be in very short supply throughout the year, with very limited and potentially no availability by the end of the season. Smaller sizes, however, are more widely available, with 60s and 80s showing stronger supply.

Given the restricted availability of larger product, market prices will remain high where stock can be sourced. We are strongly advising customers to move to smaller sizes, which are more readily available and will provide the most consistent supply through the season.

Lettuce



It is shaping up to be a challenging end to the season for lettuce as difficult growing conditions and strong demand continue to put pressure on the market.

Earlier shortages mean crops are still being harvested slightly sooner than ideal, limiting their ability to gain full weight and reach the usual specification. To maintain consistent supply, we are working closely with growers and have introduced concessions on iceberg, which are helping keep availability steady.

The ongoing pressure on crops is expected to bring the switch to Spanish supply forward by around two weeks. Despite the earlier transition, the seasons are aligning satisfactorily overall. There may be some short-term challenges on Little Gem and Cos during the changeover, with the potential for ad hoc shortages from the end of the week. Iceberg currently remains stable and we are working with growers to minimise disruption.

Aphid pressure remains elevated across much of the country, adding further complexity. A large proportion of our production sits in the north west, where contamination levels are lower and growers are managing the situation well through proactive field work. We are monitoring conditions closely and will adjust our approach if needed, but at present supply remains stable and under control.

Peppers



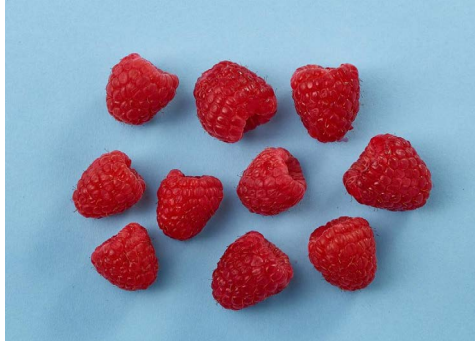
Dutch growers are still working through the effects of earlier poor growing conditions, and supply remains tight across the category. Red and green peppers continue to hold up reasonably well, but yellow remains the most constrained line, with volumes proving difficult to lift. Fruit is generally coming through on the smaller side, and growers are still relying on earlier colour picks to keep product moving and protect shelf life.

Quality pressure is also evident. Class 2 fruit is showing better resilience and is helping to support overall availability while Class 1 remains limited.

As the industry moves towards the transition from summer to winter supply at the end of October and into early November, the market is expected to remain challenging and may tighten further.

Sizing is likely to stay under strain, and both quality and availability will require close management through the changeover.

Berries



Raspberry supply remains steady with no major concerns. UK volumes are beginning to ease, so some Moroccan fruit will filter into programmes to support availability, but overall supply is stable.

Strawberries are already being supplemented with imported fruit, with around half of current volume now coming from the Netherlands. Supply is consistent and there are no material issues to manage at present.

Limes



Brazilian supply continues to face significant disruption due to severe shipping delays, which are still affecting programme movement and overall availability.

Suppliers have brought in additional fruit from alternative origins to help bridge initial gaps, but market volumes remain extremely limited and are expected to stay under pressure in the short term. This may result in some periods of shortage until new fruit arrives.

We are working closely with suppliers and logistics partners to maximise continuity wherever possible.

Lemons



Quality concerns on South African lemons continue to build, particularly on smaller sizes, as the effects of earlier flooding are still influencing crop performance across the main growing regions.

To support continuity, we are maximising supply across our grower base and bringing in additional volume from Argentina to reinforce the smaller lines. We are also preparing for a slightly earlier start to the Spanish season, which will add stability as the transition approaches.

Even with these measures, conditions are expected to remain challenging over the next four to five weeks while supply settles and new season programmes begin to come through.

Spotlight on...Portabellinis



Pick up a portabellini! These mushrooms are a relatively recent introduction and are young portobellos, picked earlier for a firmer bite and a more concentrated, savoury flavour. Sized between a standard chestnut and a large portobello mushroom, they are a great talking point on menus.

Tomatoes



The market remains tight, though our supply is beginning to ease as our growers provide strong support in challenging conditions.

While overall availability is improving gradually, plum, beef and cherry tomatoes continue to face significant pressure. These lines are likely to remain difficult over the coming weeks as programmes transition into winter, and we are working closely with suppliers to minimise the impact on customers.

Aubergines



Availability and quality are coming under increasing pressure as the season nears its end. Crops are being affected by shorter shelf life and more visible quality challenges, both of which are expected to persist over the coming weeks. Suppliers are working closely with us to support continuity, but conditions are likely to remain difficult until new season production begins in early November.

Brassicas



Growing conditions continue to improve, although several challenges remain. Pest pressure is still high, particularly whitefly, which is being encouraged by the warmer weather. The lack of rainfall is making control more difficult and is adding further strain to crops already under pressure.

Cauliflower remains smaller than usual, and spring greens, kale and cavolo nero are also being affected. Customers are reminded to wash these products before use.

Cooler night time temperatures are now slowing growth, adding further difficulty for a category where availability is already reduced. This is likely to remain a limiting factor as we move deeper into autumn, and both quality and supply will require close management as conditions evolve.

News in Brief:



Asparagus remains under pressure, with El Niño disrupting development, and ad hoc air freight is being used to protect quality, but overall availability will stay tight until field conditions stabilise.

Blueberries are now fully transitioned to Peru. Volumes and quality are satisfactory, but some concern about the potential impact of El Niño towards the end of the year and into 2027.

Cucumbers remain stable and continue to improve, with no issues expected as we approach the end of the season

Melons - there is a higher proportion of larger fruit still coming through on melons. Cantaloupe remains the most affected and a concession remains in place to support supply.

Onions will be smaller this season, and availability will be tight as a result of poor summer growing conditions are now fully reflected in this season's onion crop.

Parsnip and Carrots are showing signs of difficult growing conditions with extra pressure expected on supply through October and November, as missing plantings may impact market-wide availability.

Red and White Cabbage will have market-wide availability challenges until the new season.