

CROP REPORT

Wednesday 6th December to Wednesday 13th December

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.

Weather Update – Spanish water shortages

Lorca in the Murcia region of Spain is one of Europe's premier growing areas for lettuce and broccoli. With the region in the midst of a long-term drought, where it has not rained for many months, it has put significant pressure on the local water infrastructure.

To preserve the water supply for the local population, the authorities have placed restrictions on growers, which means that no planting will be permitted for the next two weeks. While plants that are currently growing and being irrigated can continue to be watered, no new irrigation will be allowed.

This should not have a major impact on the pre-Christmas period, but it will affect availability into the January period. We are maintaining a watching brief and are working on mitigation plans should the sanctions be extended or expanded to other areas, which could then continue availability issues into February and March.

Cauliflower



Availability of cauliflower has been challenging over the past few weeks, with inclement weather hampering growth and farmers' ability to harvest. As we highlighted last week, our concerns over deteriorating weather conditions in key growing regions unfortunately came to fruition. Snow, rain and icy conditions meant that product has become frozen in the fields and attempts to harvest it have been severely hampered by farmers being unable to access the fields.

As well as availability, quality is also suffering as the weather conditions impact growth. We are working hard with our suppliers to try to identify additional stocks, but with the market as tight as it is, there are likely to be problems for at least this week, after which any improvement will depend on better weather.

Prepped potatoes



We are seeing some significant issues with prepped potato products. The poor growing and harvesting conditions have meant that the raw material is not as robust or well-formed as it should be, which is causing problems as they are being processed.

We are expecting a prolonged period of quality issues as the season progresses, which could also result in short-term availability issues if the product cannot be properly processed, which may only be known once processors take the product in.

While we are working with our suppliers to mitigate the problems, it is likely that we will see issues until the new season in late summer 2024, but we will endeavour to regularly report updates to aid planning.

Strawberries



We have been reporting issues with strawberry availability for the past few weeks, with various issues causing market challenges. The problems can be traced back to the heatwaves that impacted growers across Southern Europe and North Africa in the summer. This led to the late planting of new season crops across the region.

The issues have been exacerbated by the recent abrupt change in the weather, which has caused problems for plant growth, particularly stopping the fruit from colouring. And, adding to the list of problems, we have seen some additional freight delays.

While these are short-term issues, we do expect general market challenges to remain for around a fortnight before easing. In the meantime, we are working with our suppliers to try to identify additional supplies and mitigate the shortages as far as we can.

There are currently good supplies of raspberries that could be used to substitute if appropriate.

Lettuce



The main issue with lettuce remains with continental varieties, which are continuing to recover from the recent temperature drop which impacted the crop and sent the plants into shock. The plants are recovering, but volumes remain sporadic.

We are maintaining a watching brief on the water sanctions in the Lorca region and are working with suppliers to try to minimise any impact on customers. We will provide further updates as issue develops.

Potatoes



The past two years have seen the worst combined harvests in recent memory with the lowest level of closing stocks being compounded by planting levels that are significantly down on what was expected.

This has been exacerbated by a poor harvest, where weather conditions have meant that many potatoes have been written off as farmers have been unable to harvest them. We are expecting significant availability issues later in the season as stocks diminish.

The main issue at the moment is the quality of the crop. As well as impacting the harvest, the heavy rains and flooding has affected the quality of the crop, with an increase in defects.

Tenderstem Broccoli



The market for Tenderstem broccoli remains challenging, and we are currently sourcing from Kenya and Spain as we work with suppliers to try to mitigate any potential shortages. While product supply remains hand to mouth, the possibility of short-term issues remain, particularly if there is a rejection on quality grounds.

We expect the situation to continue to improve as volumes from Spain get better into December, but there may be some challenges in the meantime.

Broccoli



Volumes continue to increase week on week as more Spanish product becomes available. We are currently rebuilding stocks following the supply challenges that we saw last month. Once stocks are rebuilt, any potential short-term issues that could be caused by quality rejections are less problematic.

Grapes



The market is very challenging as freight delays from Brazil continue to impact availability of a range of products, including grapes.

We are seeing particular availability challenges across green grape varieties. We expect problems to continue until the end of December after which we will move to South Africa, which should improve supply.

Roots



The situation with root vegetables is acceptable and, while the fields are currently a challenge for farmers, we are not experiencing any major supply issues at the moment. However, as we approach Christmas, we are maintaining a watching brief as any further weather issues have the potential to cause some problems in the market.

Mushrooms



The poor weather conditions in Eastern Europe have slowed production, which has caused some logistical issues that have resulted in availability challenges on Class 2 mushrooms. However, we are using Class 1 material to cover where appropriate.

Oranges



While there are quality and availability issues with the Spanish crop, we are not currently facing any supply concerns. However, we are planning to move to Egypt and Morocco as soon as we can in January, which should help improve both quality and quantity.

Pears



As we've previously reported, we are anticipating some potential issues with stored product in the new year. The root cause has been the difficult growing season in the Northern Hemisphere, which has impacted quality and shelf life.



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