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Crop Report

Wednesday 4th November to Wednesday 11th November

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.

Lettuce



The transition from UK to Spanish lettuce production is continuing and has proved more challenging than anticipated. Poor end-of-season growing conditions in the UK have accelerated the move to Spain earlier than planned, creating short-term pressures during the changeover period.

Growing conditions in Spain are improving, and we expect supply to strengthen over the coming week, with full production programmes commencing from next week. In the meantime, a concession is in place for iceberg lettuce to help support availability and maintain continuity of supply.

We are working closely with our growers and supply partners to minimise disruption and reduce the impact of this challenging transition, while continuing to provide customers with the best possible service and availability.

Brassicas



The transition to Spanish brassicas has started for broccoli and sweetheart cabbage, with split supply this week as the remaining British stock is used up. The switch will be completed over the next week or so.

For the remaining UK crops, whitefly remains a significant problem, although the weather is helping to reduce numbers. This is impacting particularly spring greens, kale and cavolo nero.

With cavolo nero, we have worked with our suppliers to address shortages caused by the whitefly issues, and are now supplying less mature produce, which has not been so badly impacted by the pest issues, restoring supply. We will continue to proactively manage this over the coming weeks.

Please continue to follow the standing advice, which is to wash these products before use.

Fine Beans



Extreme temperatures in Morocco have increased spider mite pressure, resulting in leaf damage and weaker plants. This has impacted both yields and overall quality, with Moroccan supply expected to remain constrained over the coming weeks.

To help offset these challenges, Egyptian supply is continuing to supplement volumes and support continuity of supply. While market conditions remain tighter than usual, we are not currently anticipating any shortages within our supply chain, but it is challenging.

We continue to work closely with our growers and sourcing partners to manage availability and minimise disruption. However, given the tighter market environment, we encourage customers to communicate any significant increases in demand as far in advance as possible to help ensure supply requirements can be met.

Limes



The delayed vessels from Brazil are expected to dock shortly, which should help ease the supply challenges experienced across the past few weeks and improve overall market availability.

This improvement coincides with the launch of our winter sourcing programme, which includes the introduction of a new supply partner. This additional source of supply will help strengthen availability and provide greater resilience as we move through the season.

While the wider market is expected to remain challenging over the next month, with export volumes from Brazil significantly lower than usual, our expanded sourcing strategy and access to additional origins have helped open up new supply routes. This provides greater resilience in supporting customers and navigating ongoing market pressures.

Mushrooms



There are some short-term challenges in the mushroom market due to the performance of new season straw, which has been affected by the exceptionally dry conditions experienced during the summer.

This has impacted growing performance and is particularly affecting large flat mushrooms, with some temporary concessions required on larger flat mushroom lines.

While availability pressures are being seen across the wider market, we do not anticipate any significant supply issues. Our multi-supplier sourcing strategy continues to provide resilience, and we are working closely with growers to maintain continuity of supply and minimise any disruption to customers.

Lemons



This week marks our first full week of Spanish lemon supply as the market transitions away from the South African season. The South African crop is finishing earlier than anticipated following challenging growing conditions at the start of the year, which contributed to tighter availability and poor quality produce.

The move to Spanish sourcing is expected to improve overall availability and help ease market conditions as volumes continue to build.

Potatoes



This year's potato crop is proving to be one of the most challenging in recent years. Difficult growing conditions throughout the summer, combined with limited water availability in many regions, have restricted crop development and reduced yields.

While the situation varies across the UK, Scotland has generally fared better than other growing areas due to more favourable weather conditions.

To help maintain continuity of supply, we strongly recommend customers consider switching to smaller potato sizes where possible. Market availability is expected to become increasingly challenging after Christmas, particularly for larger baking potatoes, including 40s and 50s. In contrast, smaller grades such as 60s and 80s remain more readily available and are expected to offer the most consistent supply throughout the season.

Early planning and flexibility around specification will be key to managing availability as the market tightens in the months ahead.

Tomatoes



This week marks the transition to our winter tomato programme, with supply moving to Morocco, mainland Spain and the Canary Islands as Dutch production comes to an end.

The start of the season is expected to be particularly challenging for beef, plum and vine tomatoes. Prolonged heatwaves in Spain during the growing cycle have delayed crop development, leaving volumes below expected levels and limiting product available for harvest. Availability across these lines is therefore likely to remain tight over the next two weeks. Cherry tomato supply is also expected to be constrained during this period.

As production builds across our winter growing regions, availability is expected to improve progressively, with more stable supply anticipated from mid-November onwards.

We continue to work closely with our growers and supply partners to maximise availability, manage transitions effectively and minimise any disruption to customers during this challenging start to the season.

Strawberries



Strawberry availability remains extremely challenging as the UK season draws to a close more rapidly than expected following difficult growing conditions. At the same time, Dutch production, which is typically limited at this stage of the year, has yet to reach anticipated volumes and is now expected to finish earlier than normal, creating a supply gap ahead of the start of the Moroccan season.

As a result, significant market-wide shortages are expected over the coming weeks. We had hoped to supplement supply with additional volumes from the US; however, adverse weather and heavy rainfall have impacted quality, making this more difficult, although it remains a potential opportunity.

We continue to work closely with growers and supply partners to maximise availability and minimise disruption wherever possible. However, the severity of the current supply challenges means intermittent shortages are likely in the short term.

Peppers



We have now started receiving Spanish peppers. However, as the season is still in its early stages, market availability remains relatively tight. Supply is expected to improve as production volumes build over the coming weeks, while availability of Class II peppers continues to be good.

Looking ahead, we anticipate some quality challenges across the season, particularly relating to thrips pressure. While thrips does not affect the eating quality, flavour or safety of the product, it can cause minor cosmetic skin marking and surface defects. We continue to work closely with growers to manage these challenges and maintain the best possible quality and availability throughout the season.

News in Brief:



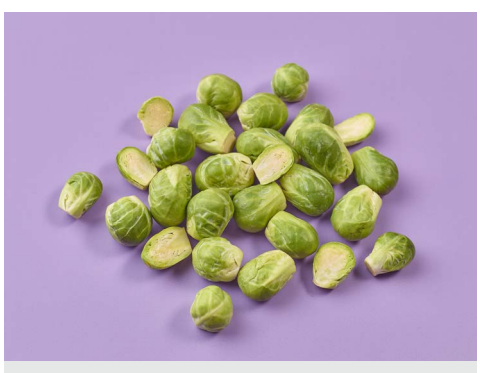
Asparagus remains under pressure, with El Niño disrupting development, and ad hoc air freight is being used to protect quality, but overall availability will stay tight until field conditions stabilise.

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.

Melons - There is a higher proportion of larger fruit still coming through on melons. Cantaloupe remains the most affected and a concession is in place to support supply. This is likely to remain in place for another couple of weeks.

Red and white cabbage will continue to face market-wide availability challenges until the new season, due largely to the reduction in the number of growers. We are working with suppliers to maximise availability.

Spotlight on...British Brussels Sprouts



It's that time of the year when we bring out the Brussels! The epitome of Christmas, Brussels sprouts are the marmite of the season...but love them or hate them, they are definitely a key part of the festive season, and everyone has an opinion! Sprouts come into their own at this time of year as they thrive in colder conditions, which helps concentrate their natural sugars and gives chefs a consistent, high quality crop.

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