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# Crop Report

## Wednesday 25th November to Wednesday 2nd 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.

### Cavolo Nero and Curly Kale



Our procurement team has secured additional volumes of cavolo nero, helping to improve availability and ease some of the recent supply pressures. While availability has strengthened, growers continue to manage seasonal whitefly pressure across cavolo nero and curly kale, which remains an ongoing challenge across UK production.

Customers are advised to continue following existing guidance and wash products thoroughly before use. Growers are employing rigorous crop monitoring, selection and harvesting practices to minimise the presence of whitefly, but the issue is likely to persist until weather conditions become less favourable for the pest.

We continue to work closely with our growers and supply partners to manage crop quality, minimise disruption and maintain continuity of supply wherever possible.

### Strawberries



The strawberry market remains under significant pressure, with industry-wide shortages intensifying as the UK season draws to a close and quality challenges become more widespread. The Dutch season has also finished earlier than anticipated, removing a key source of supply and placing further strain on an already tight market.

Although early Moroccan strawberries are now starting to arrive, volumes remain extremely limited and delays to the start of the season have further restricted availability. As a result, supply continues to fall well short of demand, and short-term availability is expected to remain particularly challenging across the market.

To help mitigate the shortfall, we are sourcing strawberries from a range of origins, including air freighted fruit from Mexico and Egypt. However, despite these efforts, global availability remains exceptionally tight and customer shortages are likely to continue in the short term.

Challenges are expected to remain for the next week to two weeks, depending on how new season Moroccan fruit develops.

### Peppers



This season is shaping up to be particularly challenging, with Spanish growers reporting significant thrips pressure across the key Almeria growing region. The pest is affecting both crop appearance and yields, raising concerns around the availability of Class I product as the season progresses. Early indications suggest the issue could be widespread, and we are working closely with suppliers to understand the full extent of the impact.

Conditions in Morocco are currently more favourable, with significantly lower thrips pressure and fewer quality concerns being reported. A clearer picture of overall availability will emerge over the coming weeks as harvest volumes increase.

Some cosmetic concessions are likely to be required, and market-wide availability challenges may develop as the industry adapts to reduced Spanish production. We will continue to monitor crop conditions closely and provide further updates as the season progresses.

### Lemons



As the crop is still establishing itself for the season, the fruit is undergoing degreening, which is artificially ripening the crop, which, coupled with very hot, humid conditions, is contributing to quality issues that are not present until after a few days of packing.

This is difficult to identify at harvest and, in many cases, these issues only become apparent later in the supply chain, resulting in delays while replacement stock is sourced. Alternative sourcing options are limited at this time of year, but this is expected to be a short-term challenge as the Spanish season develops and fruit maturity improves.

Additional quality controls have been implemented throughout the supply chain to minimise the impact on customers and support continuity of supply.

### Tomatoes



Tomato quality and availability continue to improve as we move further into the winter season, across mainland Spain, the Canary Islands and Morocco.

While there is still the potential for occasional quality issues as the season fully establishes, the overall situation is much better than we have seen in the past few weeks.

### News in Brief:





**Asparagus** remains under pressure, with El Niño continuing to disrupt crop development. Air freight is being used selectively to protect quality, but availability remains tight and spear diameter is becoming increasingly challenging as the season progresses.

**Blueberries** are facing medium-term supply concerns after adverse El Niño conditions significantly reduced crop volumes by around 40%. Market pressure is expected to materially increase later in the year before Moroccan production helps ease availability.

**Fine beans** remain affected by extreme temperatures in Morocco, which have increased spider mite pressure and reduced both yields and quality. Availability is expected to remain tight over the coming weeks. Additional checks are in place.
Melons continue to be impacted by vessel delays, particularly Galia and Cantaloupe lines. Size concessions remain in place to support continuity of supply, with no significant availability concerns expected.

**Parsnips** currently remain available, although market-wide quality and sizing challenges are expected to emerge in the run-up to Christmas, potentially requiring concessions on sizing or crowning to maintain supply. This is already being seen in some retailers' produce with parsnips crowning in the bag.

**Potatoes** are facing increasing pressure following difficult summer growing conditions and reduced water availability. Availability is expected to tighten after Christmas, particularly for larger baking potatoes, while smaller grades remain more readily available.

**Red and White Cabbage** availability is expected to remain tight until the arrival of the new season crop, driven by reduced UK growing capacity and lower production volumes. Challenging market conditions are likely to persist in the months ahead.

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