

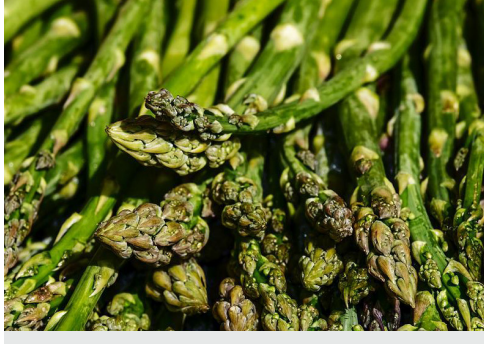
CROP REPORT

freshdirect™
a Sysco company

Wednesday 24th January to Wednesday 31st January

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.

Asparagus



While the market remains very challenging, we have alleviated many of the problems that we've seen with the Peruvian market by securing additional supplies from other origins, particularly Thailand.

We will shortly be supplementing Thai supply with Mexican product, which will then gradually become the dominant origin for supply. With the measures that we've taken, we expect a more settled supply, although the general market situation will remain challenging. We will continue to work with suppliers to ensure that we maintain availability until the start of the UK season.

Butternut Squash



Due to the poor quality of product in store, which was affected by the wet weather during the harvest period, we have ended our Portuguese supply around six weeks ahead of the scheduled finish.

While we are bringing forward the start of South African supply, there are some issues with shipping caused by challenging weather conditions, and it is still early in the season. In order to mitigate the challenges, we are utilising Spanish and Egyptian product to cover, albeit concessions may be required until South African stock becomes more readily available.

We expect this to be addressed during the second half of February.

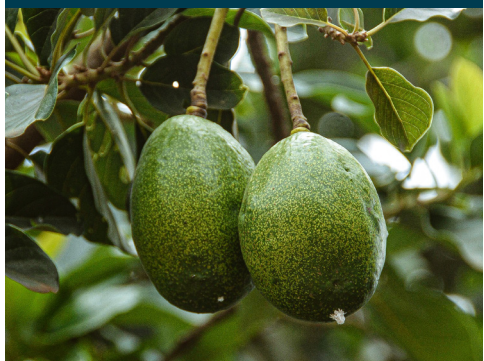
Grapes



The problems caused by shipping delays in South Africa mean that red grapes remain in short supply. The severe weather that we saw during the end of December and into the New Year is expected to mean that produce will be a further fortnight before it arrives. However, once it does, availability is expected to return to normal.

The knock-on effect of delays in shipping and clearing the backlog is causing some concern for white grapes. While we have put contingency plans in place and are not expecting any major shortages, further shipping delays could lead to some issues.

Avocados



January is a traditionally challenging month for avocado supply as we transition between different seasons. This year has been made even more difficult for example with Spain and Morocco seeing lower yields and product from Israel more difficult to source.

There is the potential for some availability problems over the next couple of weeks, but we are working with our suppliers to mitigate the shortages.

Bananas and Pineapples



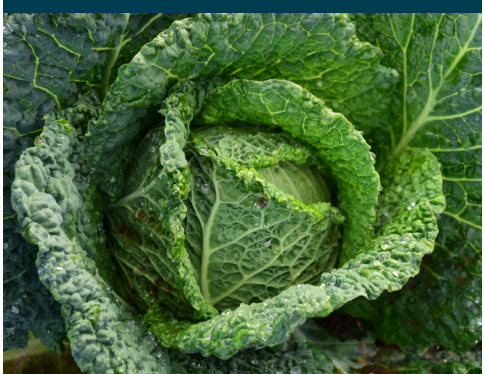
There have been some shipping delays, which has meant that stock destined for the UK market was diverted to Vlissingen in Holland. There are likely to be some short-term availability issues, particularly with pineapples, while the supplier transports stock back to the UK. There will also be a concession on small bananas to try to minimise the impact of the delays.

Beef Tomatoes



As we have previously reported, the market remains short of beef tomatoes, with Morocco not yet delivering the volumes the market requires. While we will have Egyptian product available from the end of January, we may need to use different origins and size concessions to mitigate potential shortages until then.

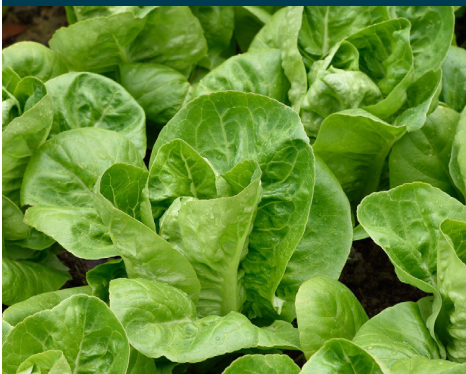
Cabbage



The wet weather, followed by frost, has impacted several cabbage varieties either slowing their growth or causing them to die in the fields. Seasonal Savoy, Kale and Cavalo Nero have all been impacted to some extent.

We are working with growers in the hope that we will see the crop regrow, but it is likely that availability will be hampered, and we will need to import to mitigate some of the shortages.

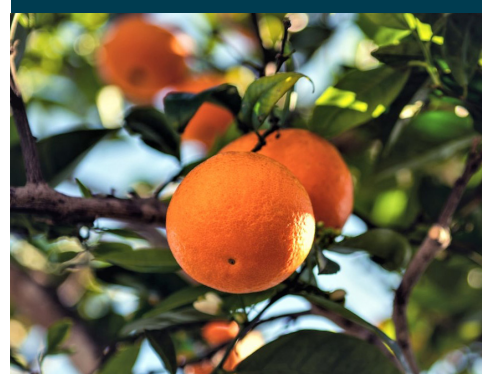
Lettuce



We continue to see a gradual improvement in lettuce availability. However, continental varieties, particularly Lollo Rosso continue to struggle.

We expect some continued shortages this week, before an improvement next week, albeit concessions will need to remain in place to support availability.

Oranges



We are continuing to maintain a watching brief on shipping from the Red Sea and Suez Canal which is delaying deliveries from Egypt, which is currently supplying oranges.

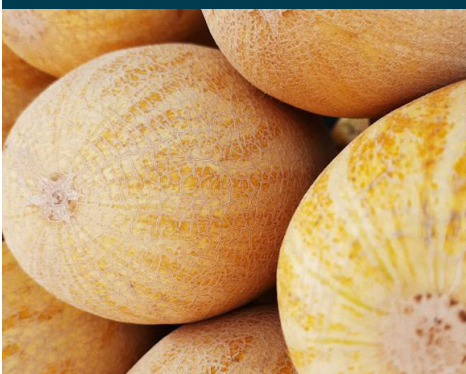
Although we are not currently experiencing availability issues, with the unsettled state in the region, further delays are possible.

Plums



Plums are another fruit which has been delayed by the impact of inclement weather conditions on shipping. Product is en route and, while we are anticipating some shortages towards the end of the week, these will be short-term, with availability hopefully returning to normal next week.

Yellow Melons



Growers in Brazil are reporting that the early rains have had an adverse impact on the quality of the crop destined for export. We are not expecting any major availability issues, as we plan to switch to Honduran supply earlier than expected to mitigate the quality issues. However, there could be some potential problems during the transition at the end of the month.

Yellow Peppers



Yellow Peppers are currently in short supply, which is typical for the time of year, with products being graded out. However, this year there are some additional issues, with pest problems causing scarring and poor quality. We expect an improvement shortly.

Potatoes



As we have been reporting, potatoes continue to be a major concern, with some commentators suggesting that the market will be up to a million tonnes short of consumption levels over the season.

We are working hard to try to mitigate shortages, for example sourcing some additional supply from other origins including France and Cyprus. However, we expect the market-wide problems to continue until the new season.

We also anticipate some longer-term problems with a shortage of seed potato suggesting that the problems could extend even further.

We are continuing to see the problems extend into the further processed sector as manufacturers struggle with a lower quality raw material. It is inevitable that these problems will continue and potentially worsen as the season progresses.

Milk and Cream



In February, we're taking the next step in our sustainability journey, by removing the colour from lids on our milk cartons.

By changing coloured caps to a clear alternative, we can do our part in making recycling easier and reducing colour contamination in the high-density polyethylene (HDPE) stream.

This is increasingly important as we play our part in helping the country become less dependent on virgin plastic. Across Fresh Direct, we'll be changing around 20m lids every year, but cartons will still be easily identifiable by the traditional milk colours on the label.

Also in February, we're bringing our milk cartons in line with the industry standard 4pt, 2.27lt packs, which will provide some further sustainability benefits, as we'll use fewer caps and will help give greater stability as we source our packaging.

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