

CROP REPORT

May 2025





Meet Simon – Our Procurement Expert

Simon leads procurement, overseeing fresh, dairy, and dry goods. With 20 years' experience, he excels in trading, importing, and supplier relations. His industry knowledge is second to none, here's his May crop report...



MAY MARKET MOVES:

The latest updates on the marketplace to help plan menus, what to look forward to and what to avoid.

May marks the end of most of the Spanish season for salads, tomatoes, peppers and we move over to the, arguably more reliable, Dutch season. Prices typically remain steady as the weather is more reliable than the Spanish winter. This year has been great weather for planting compared to the late UK Plantings of 2024 which caused delays.



POTATO NEWS



Spring 2025 brings mostly dry, sunny weather across Northwestern Europe (EU-4: Netherlands, Belgium, France, Germany), enabling fast-paced progress in planting.

This season marks a notable increase in potato planting, with about 65% planted in NL and FR, and 50% in BE and DE. A growth in acreage of approximately 5% (adding 28,785 hectares) is expected across EU-4, potentially surpassing 600,000 hectares—a record-breaking milestone.

Some Key Insights:

- 1. Weather and Planting Conditions:** March and April have been exceptionally dry, marking the driest spring in over a century for NL and BE and the UK. While drought poses a long-term risk, current conditions favour planting, particularly on lighter soils and early varieties.
- 2. Potato Planting Trends:** Farmers are transitioning from dairy land to potato cultivation due to lack of profitable alternatives. Growth varies by region, with higher processing potato acreage in Northern France and Wallonia, but minimal expansion in Flanders.
- 3. Market Dynamics and Processing:** Potato stocks remain robust, with processors focusing on pre-contracted supplies. Exceptions like Innovator show strong demand. Some growers opt for free (non-contracted) potatoes to hedge risks.
- 4. Speculation:** Changing market sentiment affects price formation for next year's harvest. Seed availability and competitive pricing further drive planting activity.
- 5. Risks and Benefits:** Historical data suggests dry springs don't necessarily harm yields. Benefits include better soil structure and reduced disease pressure, though outcomes hinge on tuber formation later in the season.

Vegetables

COURGETTE

We will continue to work with Spanish supply while we wait for the UK season to start. There is currently good volumes available and prices remain steady.



LEEKs

UK leek normally runs until the first week of May, where we will switch over to European supply through until July. We can expect prices to increase when this happens.



ONIONS

Spanish onion is finished apart from a little cold stored, which is having quality issues.

The very large onion is now reliant on the very expensive Chilean and the smaller graded UK supply which is still very good quality. UK and Dutch onion have shot up in price as a result.

CAULIFLOWER

The UK cauliflower season is doing a lot better this year due to the very good growing conditions, this time last year was a different story with price in double figures and the ground being too wet to plant anything.



CARROTS

UK Carrot is in good supply, prices and quality remain stable. It's been better growing conditions this year so we haven't

moved over to Scottish supply as early. This will keep prices lower for longer before we move to European supply.

PARSNIPS

All open ground crops are cleared or not good enough quality to harvest.



The late Easter (which if in early April, is a great time to clear the last open ground) and low retail prices meant Easter retail volumes were similar to Christmas. And now there is simply not enough strawed crop left to cover requirements for the next 5 weeks. Spanish parsnips are looking ok, but will not be available until early June – which is the normal supply period. Prices are rising and will become more and more limited.



BROCCOLI

Spanish broccoli is still in supply, but the volume will continue to reduce until the UK crop is

ready. Speaking with growers the UK season is due to start at the beginning of June, so a little earlier this year.

SAVOY

We are solely using Spanish and Portuguese 8's. Quality is excellent and there is good availability.



Vegetables

RED KALE

is only having a 10 day gap this year compared to the month gap last year. Finishing at the end of April and starting at the beginning of May.



SPRING CABBAGE

Our UK Spring cabbage grower is 3 weeks early this year and started mid April. New season quality is excellent.



CAVOLO NERO AND GREEN KALE

will go all the way through this year. New

varieties planted over the winter have done well in the spring, so no reliance on Italian imports is needed.



RED AND WHITE CABBAGE

This is all mostly in cold store now, quality remains good, red and white cabbage has started to rise in price as some cold stores have limited availability.

Fruit



STONE FRUIT

Delays in the start of the Spanish season will lead to improvements in the size and quality of early stone fruit

The stone fruit season in Spain's Levante region has been delayed by about 8-10 days compared to last year; "however, this delay, accompanied by temperatures that are not very high, is helping the fruit gain size and ripen little by little.

This year apricots has seen a generalized decline of 30-35% in the Region of Murcia

"The cause of this drop in the production is the rains in March, which lasted 2-3 weeks. When the rainy period started, the extra-early varieties were already in the process of setting, but the semi-early ones were in full blossom, Later apricot varieties will also suffer losses, but they will be much less severe thanks to their later flowering periods, which has minimized losses."

BLACKBERRIES



Spanish fruit has already started and will continue while we wait for the UK crop to start end of July beginning of August.

BLUEBERRIES

Spanish production is now showing good availability alongside Moroccan. The price and quality is excellent.



Fruit



STRAWBERRIES

Spain is looking to finish in May, the fruit is becoming more marked as the

temperature increases in Spain.

Belgium and Dutch Strawberry is available, and the UK is due to start a little earlier this year after the recent sunny and warm weather. UK outdoor volumes will increase through the month.

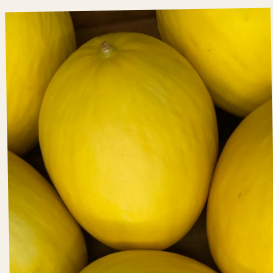
RASPBERRIES

Quality has been very consistent with availability and pricing better than in recent weeks. The outdoor crop should start towards the end of May.



MELONS

First harvests of Spanish Almerian Watermelons are now being offered.



We expect the other 3 lines to become available soon. The growers in Almeria will not fix prices and sell only on auction price. We will not see sensible prices from Spain until Murcia starts approx. 23/06/25 (this has been delayed by about 10 to 14 days to the rains when planting should have occurred).

We aim to keep using melons from Brazil and Costa Rica although there maybe fluctuations in size availability.

ORANGES

There is still some late varieties of Spanish and Egyptian.

Southern Hemisphere fruit will also be available demanding a premium for new season.



MANDARIN/EASY PEEL

Moroccan Nadorcotts are still readily available, prices are holding at similar levels, until Southern Hemisphere season starts.

Clementines are the best known Mandarin type grown in South Africa. The first Clementines were imported to South Africa from Corsica in 1973. The season for South African Mandarins is from the end of May through the middle of October.

LEMONS

The Spanish Primafiori has pretty much finished, and we will be moving onto the Spanish Verna which is not quite as clean looking as the primafiori.

South Africa and Argentina are on their way and will be starting to cover supply over the summer.



Salads



LOLLO ROSSO /
OAKLEAF /
LOLLO BIONDI

We will have glass house lettuce starting end of April which will soon move onto outdoor lettuce. It's all starting a little earlier this year due to the warmer dryer weather. Our growers have been working harder with irrigation to keep the crops moving forward.

ASPARAGUS

The UK season will be in main supply; prices should be at their most competitive.



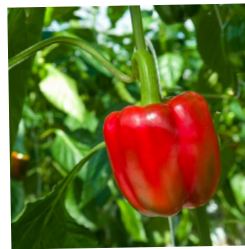
ICEBERG / LITTLE GEM

UK lettuce is due to start early May in small volumes weather pending.



PEPPERS

We have already started on Dutch peppers in April due to limited supply from



Spain, we will continue to completely move over to Dutch supply.

TOMATO

We have moved over to Dutch supply now quality is excellent.



Eggs

DEFRA LATEST BIRD FLU (AVIAN INFLUENZA) IN ENGLAND UPDATE

Department for Environment, Food & Rural Affairs (Defra) and Animal and Plant Health Agency (APHA) have provided an update on the current situation regarding bird flu (avian influenza) in England, detailing the latest cases, restrictions, and guidance for bird keepers and the public.

As the spread of Avian Influenza continues, the Agricultural Industries Confederation (AIC) is reminding its Members that there has been an extension of the mandatory housing

order to include Cumbria, County Durham, Northumberland, and Tyne and Wear.

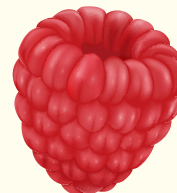
- Enhanced Biosecurity and Housing Measures: From 00:01 on Monday 7 April 2025, the regional Avian Influenza Prevention Zone (AIPZ) mandating enhanced biosecurity and housing for kept birds has been extended to cover Cumbria, County Durham, Northumberland, and Tyne and Wear. This is in addition to the existing measures in Cheshire, City of Kingston Upon Hull, East Riding of Yorkshire, Herefordshire, Lancashire, Lincolnshire, Merseyside, Norfolk, North Yorkshire, Shropshire, Suffolk, Worcestershire, and York.

- England-wide AIPZ: The AIPZ mandating enhanced biosecurity remains in force across England. Bird keepers must check if they are in a bird flu disease control zone and follow the rules for that zone, including obtaining a licence to move poultry, poultry by-products, eggs, material, or mammals if required.













BUYERS CHOICE - RASPBERRY



DID YOU KNOW!!!
RASPBERRIES ARE A
MEMBER OF THE
ROSE FAMILY

UK Raspberry is starting at the end of May and run through until November.

-  **DID YOU KNOW** – Scotland is famous for its raspberries. During the 1950s, raspberries were shuttled from Scotland to London on a train called The Raspberry Express. There are over 200 varieties of raspberries. Most are red, but you'll also find purple, black and yellow/golden ones.
-  Each raspberry is made up of many tiny bead-like fruits called drupelets clustered around a central core.
-  Unlike many other fruits, raspberries do not continue to ripen after they have been picked.
-  The leaves of raspberry plants can be used to make herbal tea.
-  Raspberries are a member of the rose family.
-  They contain more vitamin C than oranges.
-  The average raspberry has about 100 to 120 seeds.
-  What makes raspberries so red?
 - The health benefits of raspberries just keep on coming! The bright red colour is actually due to the high level of antioxidants in each berry.
 - Anthocyanins are responsible for any of the purple, blue or red colours seen in nature including blueberries, purple cabbage, pansies, even black rice and the blood orange.



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