FRESHVIEW Foods Ltd

CROP REPORT

September 2026

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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 September crop report.

September brings severe fresh produce supply challenges. The British onion crop faces its most difficult season on record, while the Dutch glasshouse sector—the UK's main backup for tomatoes, peppers, and cucumbers—is also running short with higher prices. Fortunately, domestic apples, pears, and plums are performing exceptionally well, and autumn brassica availability is beginning to stabilize.

Weather Outlook

The UK is experiencing typical early-autumn weather (18–22°C day, 10–13°C night).

Rain has returned to the north and west, but eastern England remains severely dry. East Anglia recorded just 2mm of rain in July—96% below average—a trend that persisted through August. Depleted farm reservoirs and abstraction limits have hit crops hard.

European growing regions show mixed conditions: Holland sees lower light levels (17–21°C), Southern Spain is planting new-season crops (26–30°C), and Morocco remains steady (24–27°C). However, broader European production is heavily impacted. Brittany vegetable losses range from 15% to total crop failure, French potato yields face historic slumps, and low water levels on the Rhine have disrupted barge freight, raising transport costs.

Across the continent, water has shifted from a reliable background factor to a strictly constrained, costly production input.

British onions face their hardest season on record

The British Onion Producers' Association (BOPA) reports its most challenging season on record, driven by severe drought and extreme heat.

Because 90% of British onions are grown in hard-hit East Anglia, water shortages and abstraction limits prevented irrigation during crucial bulking stages.

The result is early maturity, reduced plant populations, smaller bulb sizes, and significantly lower marketable yields. BOPA Chairman Ben Collins warned that quality is also a concern; prolonged heat stress increases the risk of Fusarium (base rot), making storage performance far less predictable.

Importing offers little relief, as European yields are projected over 25% below normal due to similar weather conditions. The trade faces tighter supply, smaller sizing, variable quality, and a shorter season overall.

Highlighting the systemic challenge, BOPA is pushing for improved water security, advocating for greater support for growers investing in irrigation and on-farm storage. With winter water availability determining harvest success for three consecutive years, structural reform in key agricultural regions like East Anglia is increasingly urgent.

Holland is short, & contracts are under strain

The situation in the Netherlands warrants close attention, as it removes the traditional backup for key produce.

Severe late-June heat stress severely hit Dutch glasshouse tomatoes, peppers, and iceberg lettuce, causing yields to fall well below target. Suppliers are now pro-rating contracted volumes and reshaping deliveries. Tomato prices have more than doubled, triggering force majeure, while spot market rates for peppers and iceberg surge.

Compounding this, Dutch sweet pepper acreage fell 4%, driving total production down 7%, alongside broader agricultural contraction and rising input costs.

With recovery expected by mid-September, buyers must secure supply early. Importers are currently substituting shortages with Belgian, Spanish, and domestic UK produce.

Potatoes

The English crop has been squeezed from both ends.

Sustained drought and repeated heatwaves restricted tuber bulking, while rationed irrigation left yields well below average—particularly in drier eastern counties. Wholesale values moved up sharply through the summer, with no sign of reversing.

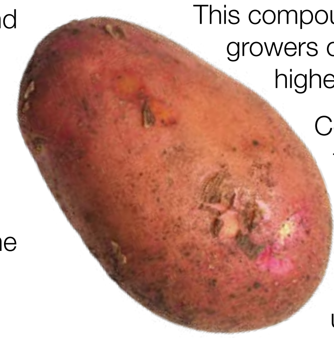
Quality is equally concerning. Harvesting from dry ground has increased tuber bruising, dry-matter variation within fields is wide, and skin finish on early-lifted crops remains mixed. Expect increased grading-out as stores fill, placing specific strain on larger bakers.

Specification relaxations across the trade are now inevitable, including smaller average sizing and wider tolerance for skin blemishes. Continental cover offers little relief, as French production faces a historic slump. Anyone operating fixed-portion menus should model these changes immediately.

How the season has unfolded

The crop began promisingly: planting finished on schedule, and optimal conditions through mid-June brought strong first-tuber sets.

However, a record-breaking summer drastically altered projections. Rainfall dropped nearly 60% below the long-term average, and key growing regions endured five separate heatwaves with temperatures reaching 35–39°C. Combined heat and drought damaged total field yields on both irrigated and unirrigated land, while severely restricting tuber length.



Weather eased after 17 August, softening ground to aid lifting. However, this relief arrived too late for much of the crop. Sample digs consistently show reduced overall yields and tuber lengths well below normal targets.

Why length matters more than tonnage

A deficit concentrated in tuber length impacts the market unevenly, hitting products dependent on specific dimensions hardest:

- **Bakers:** Drawn from the top of the size curve, bakers are exceptionally scarce. Fewer qualify per tonne lifted, largest count sizes will disappear first, and prices will rise accordingly.
- **Washed Whites:** While overall tonnage exists, saleable

yield is poor. Smaller sizes, shape irregularities, and rougher skin drive down pack-out rates, widening the gap between lifted and dispatched volumes.
- **Chipping Potatoes:** As length dictates performance, this remains the most exposed line. Short tubers yield more offcuts and fewer full-length chips, driving down factory recovery rates.
- **Frozen Chip Products:** Processors require more raw material per tonne of finished product just as raw inputs grow scarce and expensive. Premium long-cut and steak-cut formats will tighten first, whereas standard fries, shoestring, and crinkle cuts adapt better to current tuber dimensions. Expect autumn price increases and contracted volume adjustments on longer cuts.

Industry impact and adaptation

The sector faces three simultaneous challenges: less usable crop, a smaller size profile, and reduced processing recovery. This compounds pressure across the entire chain-from growers carrying yield losses to operators managing higher costs.

Consequently, length specifications and defect tolerances are adjusting industry-wide. These changes prevent sound produce from being discarded on cosmetic grounds. A potato an inch shorter or bearing minor blemishes cooks and eats identically to a ideal sample; wasting usable crop during a shortage is unsustainable.

Delivering consistent eating quality and year-round supply requires maximizing every potato lifted. Prices are transitioning to weekly updates on many lines, opening at significantly higher levels than last season. Ultimately, this harvest reinforces the critical need for long-term winter water storage and irrigation infrastructure.

CROP REPORT | September 2026

Vegetables

Onions

As set out above, this is the category to watch.

British supply is early, short and smaller-sized, with quality risk building in store. Continental alternatives are constrained. Pricing has firmed considerably and we expect it to continue on that path through the autumn. Availability is currently manageable but the season will run out earlier than normal.

Cauliflower

The winter cauliflower gap we flagged last month is now confirmed rather than feared.

Plantings that failed at establishment during the heat cannot be recovered, and while current demand is being met from UK, Dutch and Polish and German supply, the shortfall will begin to bite as the autumn progresses. Pricing is firm and rising. Anyone with cauliflower on a fixed menu through the back end of the year should be planning an alternative.

Broccoli

UK production has finished considerably earlier than usual after racing through the heat.

Supply is now largely imported, with Spanish crop starting to come on stream alongside residual Dutch volume. Pricing remains above double figures. Spanish new-season plantings look reasonable, so there is a route to improvement, but not before October.

Leeks

UK production is now well established and volumes are building nicely.

Quality is good, with steady Belgian and Dutch supply. Pricing has softened from summer peaks and should stay reasonable through September—a comfortable category this month.

Cabbage – green, white, Savoy

British green and white cabbage remain the strongest part of the brassica family, with decent quality and steady availability.

Savoy is coming on and will improve through the month. Pricing is broadly stable, which makes cabbage a sensible swap where cauliflower or broccoli is under pressure.

Carrots and parsnips

UK crops have been affected by the dry summer, though less severely than the field vegetables to their east.

Expect a shorter average length and a higher proportion of small grades on carrots. Parsnip quality should improve once we get the first proper frosts, which convert starches to sugars. Pricing has crept up but remains manageable.

Courgettes

Spanish new-season crop is starting as UK and Northern European production winds down, and the crossover is producing a slightly awkward fortnight.

Volumes are adequate rather than plentiful and quality is variable during the transition. Pricing is firm and likely to stay so until Spanish volumes properly establish.

Aubergines

Dutch and Belgian supply is easing back.

As light levels drop, the Spanish crop prepares to take over. Quality remains good. Pricing is rising on the transition, which should continue through the month.

Vegetables

Cucumbers

One of the tighter categories.

Dutch yields have been hit by the summer heat stress and the autumn crop is not filling the gap. UK glasshouse production is also winding down. Spanish new-season crop is only just beginning. Pricing is high and expected to remain so through September, with a possible easing once Almería establishes properly in October.

Sweet pointed and Ramiro peppers

Dutch and Belgian volumes are reducing as the season turns, and Spanish crop is at a very early stage.

Quality is holding up well. Pricing is rising and availability needs watching, particularly on the larger counts.

Padrón, Jalapeño, Habanero and Chilli peppers

New Spanish and Moroccan plantings are now coming into production, which is improving a picture that had become quite thin in late August.

Red chillies continue to carry a premium over green. Padrón has eased slightly as the new crop arrives. Quality across the range is sound.

Tomatoes

The whole category is firm this month, and Dutch shortfalls are the main reason. Set expectations accordingly on both price and specification.

Standard Loose Round - Yields from Holland and Belgium have dropped away materially and pricing has climbed hard. There is no realistic prospect of relief before Spanish and Moroccan winter crop establishes. Some fruit is arriving slightly backward where growers have picked early to meet allocation, so please check on arrival and give us early warning of any concerns.

Vine Tomatoes - The most affected line. Dutch volumes are well below contracted levels and spot pricing has been extreme. Availability is being allocated rather than sold freely. Quality on what is arriving is good. We are supplementing from Belgium and Spain where possible.

Beef Tomatoes - Dutch and Belgian supply continues to reduce, and pricing has rocketed to more than double. Quality is excellent and fruit is eating well. Sizing is holding better than on the vine lines.

Plum and Intense Plum - Availability has tightened and pricing sits above double figures. Quality is excellent with good flavour development. The proportion of medium-count fruit continues to rise as the season progresses — expect fewer of the very large grades.

Cherry and Cocktail - Also short, and with no easy alternative within the category since the shortage spans all varieties rather than pushing demand from one type into another. Pricing is firm. Moroccan winter crop will begin to help from October.

CROP REPORT | September 2026

Salads

Iceberg lettuce

A difficult month.

UK crop suffered badly in the heat with some growers reporting yields around half of expectation, and Dutch supply is equally short. Wholesale values have risen very sharply. Quality is variable, with a higher incidence of tip burn and internal browning than we would like. Spanish crop starts later in the month and will improve matters.

Little Gem and Cos

UK production is winding down early and Spanish crop is at an early stage.

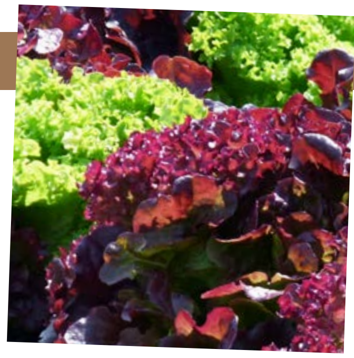
Heads are smaller than usual. Pricing is firm. Quality is acceptable but specification flexibility on size would be genuinely helpful for the next few weeks.

Celery

UK crop has performed well and continues to look good, with strong quality and reliable availability.

Pricing is stable. No concerns here.

Lollo Rosso, Oakleaf, Lollo Biondi



Supply from France and Spain is adequate.

Quality is improving as temperatures drop, which suits these varieties well. Pricing is stable — one of the steadier salad lines this month.

Our UK supplier is irrigating and supplying good quality lettuce.

Baby leaf, spinach and rocket

Italian and Spanish supply is transitioning into the autumn programme.

Spinach quality is improving now the heat has passed, with better leaf structure and less bolting. Rocket is in good condition. Pricing is stable to slightly easier.

Fruit

British apples

The home-grown season is now properly under way and this is the highlight of the month.

Early varieties have given way to the main crop, with

Gala, Braeburn, Cox and Bramley all coming forward. The dry, sunny summer has produced excellent sugar development and genuinely good eating quality. Fruit size is slightly down on an average year as a consequence of the dry conditions, so expect a smaller average count. Availability is good and pricing sensible - well worth featuring.

Fruit

British pears

Conference and Comice are both available and eating well.

As with apples, sizing is a little back on normal but flavour is ahead. A short and very worthwhile season.

British plums

Victoria and the later varieties are at their peak, and the concentrated sugars from the dry summer have produced exceptional flavour.

Availability is good but the season is short - this is a category to promote now rather than plan around for October.

Grapes

Spanish, Italian and Turkish fruit is arriving in good volumes with quality improving as the season matures.

Both seedless green and red are readily available. Pricing has settled to reasonable levels. A comfortable category.

Exotics

Mangoes are transitioning between Brazilian and West African Keitt supply with good quality throughout.

Pineapples from Costa Rica are steady on both volume and price. Avocado supply from Peru and South Africa is reliable, with Chilean and Spanish fruit due to start later in the autumn.

Berries

British strawberry and raspberry production is drawing to a close, with quality good but volumes reducing week on week.

British blackberries are performing well. Blueberries continue strongly on the back of an outstanding UK season. Expect the transition to Southern Hemisphere and North African supply to begin from October, at which point pricing will move up.

Citrus

We remain on Southern Hemisphere supply.

South African navels and Argentinian lemons drive the market, with residual Eastern Cape flooding keeping volumes tighter and prices firm. South Africa has cut 2026 orange export estimates by up to 19%, ensuring sustained firmness. Greek lemons will arrive late and smaller, while Spanish new-crop citrus starts late October.

Stone fruit

Spanish and Italian peaches, nectarines and apricots are finishing.

Late Spanish varieties will carry us through September before the Southern Hemisphere programme starts. Quality on the remaining fruit is good but volumes are falling away quickly.

Melons

The Spanish season is past its peak and winding down before we move onto Brazillian.

Watermelon availability is reducing though quality and brix remain good. Honeydew and Galia are tightening on the popular counts. Cantaloupe remains the premium end of the category with limited availability but excellent eating. Brazilian fruit will begin to take over from September.

The dairy commodity market has turned decisively this month, reversing much of the softness that characterised the early summer.

The driver has been the weather rather than demand.

The fifth heatwave of the summer constrained UK milk volumes sharply, with the southern regions worst affected. The spread of Bluetongue virus through the south-west has compounded the concern, adding a second production worry on top of the heat. The result is a market where supply expectations have been revised down across the board.

- **Bulk cream** has increased, driven by the reduced milk volumes and by rising continental values this has pushed milk up considerably. This has removed the export pressure that was weighing on the UK market earlier in the year.
- **Butter** has also increased. With cream values elevated, churning has become uneconomic for many processors, and the resulting reduction in production has tightened a market that had been carrying comfortable stocks. This is a notable reversal from the multi-year lows reached over the summer.
- **Mild Cheddar** has increased slightly. Supplies have tightened as milk has been diverted towards fresh dairy production, though the move has been less pronounced than the fats and rather less than the trade had anticipated.

The direction of travel for the coming month depends largely on whether autumn milk volumes recover as temperatures normalise. If they do, some of this month's gains may unwind. If the Bluetongue situation deteriorates, or if autumn grass growth disappoints after the dry summer, the firming trend has considerably further to run. We would treat the current level as a floor rather than a peak for planning purposes.

Buyers Choice - Kentish Cobnuts

For a few weeks each autumn, one of the few genuinely native British nuts comes into season fresh - and almost nobody puts it on a menu.

The Kentish Cobnut deserves far more recognition.

Cobnuts are cultivated hazelnuts. The iconic Kent Cob variety arrived around 1830 as Lambert's Filbert. Grown in West Kent orchards called "plats," between Sevenoaks and Maidstone, they are almost unique in being sold fresh rather than dried. Harvested green from late August through October, the kernel is milky, crisp, and faintly sweet - resembling a fresh pea or young coconut rather than a dry hazelnut.

However, the industry has declined significantly. Kent's 3,000 hectares of plats in 1913 have dwindled to a small fraction. This was partly due to timing: cobnuts ripened alongside hops, and itinerant pickers often ate the nuts instead of delivering them. Competition from cheap imported hazelnuts and land development further shrank the market, leaving just a handful of dedicated growers preserving the crop today.

Did you know?

Naming: A filbert's husk is longer than its nut; a cobnut's is shorter. By definition, the famous Kent Cob is technically a misnamed filbert.

Freshness: Fresh green cobnuts have high moisture, giving them a shelf life of days. This short window makes them a true seasonal specialty rather than a supermarket staple.

Agroforestry: Cobnut plats are an ancient British agroforestry model, grown wide-spaced over grazing land or wildflowers, with some active trees over a century old.

Cultivation: Trees are coppiced on ten-year cycles and pruned into low, open goblets. This allowed easy ground picking and simpler netting against squirrels.

Pollination: Wind-pollinated hazel flowers in January or February without insect help. The cobnuts harvested in September stem from deep-winter pollination.

Pest Control: Grey squirrels pose the biggest threat, capable of stripping an entire plat within weeks. Consequently, harvest timing balances ripeness against wildlife pressure.

Nutrition: Cobnuts are rich in vitamin E, folate, manganese, and copper, while boasting high levels of oleic acid- the same monounsaturated fat found in olive oil.

Culinary uses

Fresh: Eat straight from the husk with hard cheese and dry wine.

Salad: Fold into a Cox apple, celery, watercress, and mustard salad.

Pesto: Swap pine nuts for toasted cobnuts with rocket and parsley.

Baking & Crusts: Bake into a regional apple cake, or crush to crust roast pork or white fish.

Finishers: Drizzle cold-pressed oil over squash soup, or pickle green for winter cold cuts.

FRESHVIEW
Foods Ltd

freshviewfoods.co.uk | +44 (0) 1782 717806 | customerservices@freshviewfoods.co.uk
Lowfield Drive, Wolstanton, Newcastle-under-Lyme, Staffordshire, ST5 0UU

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