

# CROP REPORT

Wednesday 6th November to Wednesday 13th 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.

## Storms and flooding in South East Spain



Growers across South East Spain are continuing to count the cost of the exceptional and in some areas devastating storms that have affected so many communities in the region since Tuesday 29 October, including loss of life and damage to infrastructure.

We remain in regular contact with our growers through our Spanish-based supply manager who is working alongside suppliers to understand the impact of the storms and to offer any practical support we can provide in the short term.

Our growers are working hard to manage the effects of storm damage, and we expect it to be some weeks before the full impact of the storms is known, as it may have affected crop growing cycles. Categories affected by the extreme weather include brassica, citrus, lettuce and salad.

With infrastructure damaged, there is additional pressure on road networks, with multiple closures, but we are fortunate to have one of Spain's premier haulage firms as our logistics partner. This allows Fresh Direct to maintain sight of all vehicles as they travel to the UK, providing real time logistics planning and excellent communication.

Through simplifying our supply chain, proactive supply planning and spreading the risk of our sourcing geographies, with additional suppliers over the past 12 months, our procurement teams are well placed to manage extreme weather challenges when they surface and mitigate risk on behalf of our customers.

We will continue to issue further communication as the situation develops.

## Lettuce



Lettuce supply has now fully transitioned to Spain.

We are anticipating some issues over the next couple of weeks as a result of the storms in Spain. Fortunately, only two of our six suppliers, who were both still using their summer crop, faced major crop damage and it will be a couple of weeks before they are able to catch up. The remaining suppliers had already moved to their winter crop and away from the mountain regions, which meant that they have missed the worst of the storms.

There will be some challenges on products over the coming weeks. This may mean some concessions on weight as well as some issues with shelf-life due to how wet the product is.

The greatest impact is likely to be felt on Little Gem, where it is difficult to remove outer leaves before it becomes non-viable. This could lead to some availability issues.

The next couple of weeks will be challenging, but it should return to normal after that, all being well.

## Red chillies



Red chillies are facing some market availability challenges as demand is high and the Spanish crop needs a few more days to reach the correct colour.

We recently transitioned from multiple sourcing regions in Portugal, The Netherlands and Spain to just Spanish as is common for this time of year and which naturally sees a tightening of supply.

Currently, chillies are turning red slower than expected due to low light levels and reduced sunlight hours.

In the short-term, demand has remained strong which has reduced our holding buffer supply. Despite this, we have a programme in place with our suppliers and forecast next week to show improvements with normal supply resuming the following week.

## Salad



There is limited availability of tomatoes from Spain. Following last year's disruption, we had already made additional contingencies to cover the seasonal transition. We will therefore have Dutch product for another week, and will also return to the UK temporarily, while we assess the Spanish crop.

There are some slight delays on produce from Morocco, which we now expect in around a week's time, and we will be receiving our first deliveries from the Canary Islands this week.

While there is significant market pressure on peppers, cucumbers, aubergines and courgettes, we are managing supply effectively, despite the challenges in Spain.

## Avocados



The shipping delays that affected produce coming from Chile, have been exacerbated by the speed at which the produce is ripening. This is causing some ongoing challenges, although these should be relatively short-term.

As the seasonal transition shifts to Israeli fruit over the coming weeks, we are keeping a watching brief over availability, alongside our supplier, in relation to the current geopolitical situation and subsequent challenges being faced in the region. This includes where possible sourcing from alternative regions, although Israel remains a key supplier to Europe during the winter and spring months.

## Easy peelers



With the majority of easy peelers grown in the Valencia region, there will be a significant impact on market availability. We were due to move to Spain this week, once the last remaining supplies of the South African Nardocott variety had been exhausted.

Moroccan produce has also been delayed until mid-next week due to lack of fruit available, so we are expecting market-wide shortages for around a week.

We will therefore be working with suppliers to minimise the impact on customers and have a concession in place to use a small, sweet, seedless easy peeler variety.

## Strawberries



While there are some limited UK stocks available, the variable quality means that we have switched to Dutch supply this week ahead of our normal schedule. There have been some minor issues with the transition, but these are short-term.

There has been no immediate impact on the availability of strawberries as a result of the Spanish floods. However, there has been some damage to the nursery plantings of the 'fandango' variety, which could potentially have an impact on the second half of the season. We will be working with our suppliers to try to minimise any impact on customers.

## Broccoli



The vast majority of broccoli is now being sourced from Spain, with the final produce from England and Scotland expected to finish in the next week or so. With the move to Spain, the quality has improved and any issues with the produce yellowing has finished. Across broccoli and other brassicas, there has been limited impact from the Spanish storms.

## Green grapes



The concession that is in place for a slight discolouration will continue for around another week as we use the last of the Italian crop. After that, we will start to receive Peruvian and Brazilian fruit.

However, availability is down in these new origins, which means that it will be very tight through the season. While supply will be challenging, we are working with suppliers and do not expect any major problems.

## Tenderstem broccoli



The Spanish weather has damaged around 30% of the crop. However, as the British crop is still growing, we are sourcing additional British produce and do not anticipate any major problems.

We expect the challenges in Spain to be relatively short-term and should return to normal by next week. In addition to British and Spanish crops, we also have some produce from Kenya available.

## Lemons



The majority of our lemons are grown and packed in Murcia, which has not experienced heavy rains to the same extent as neighbouring areas of Valencia and Almeria. While there may be some short-term harvesting challenges, we are not expecting any major issues, subject to no further weather disruption.

## Limes



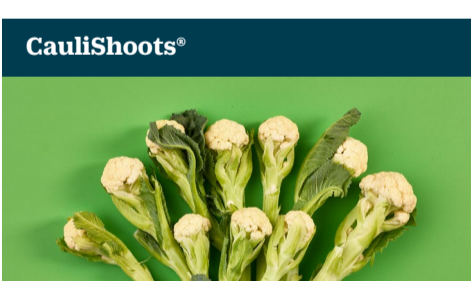
There has been some rain in Brazil, and we are therefore now expecting to see an improvement in the quality of limes following the drought conditions which impacted the colour of the fruit previously. While this is good news, the new produce will still take some time to arrive from South America.

## Sweetheart cabbage



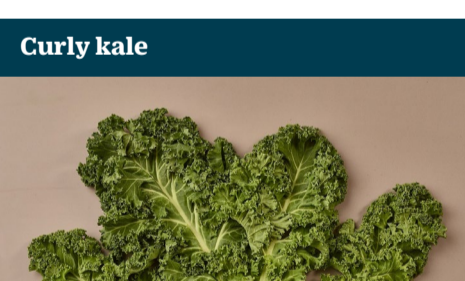
We have now received our first Spanish deliveries, and supply will be split between the UK and Spain for the coming week. We expect the final British produce to last around a week or two, after which all Sweetheart cabbage will be Spanish.

## CauliShoots®



Our growers have been working really hard and have managed to bridge the gap between the British and Spanish seasons. While this is fantastic news, we will be maintaining a watching brief on the Spanish crop to ensure that there has been no impact from the weather conditions.

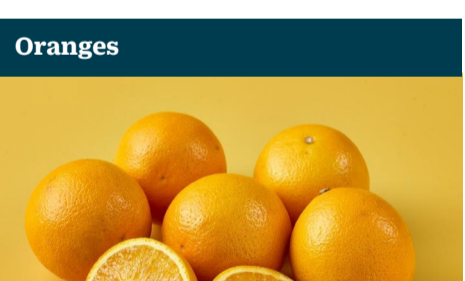
## Curly kale



We have introduced additional checks, which have helped to address some of the quality concerns that we had been seeing.

We have also been working with suppliers on contingency measures to maximise shelf life as the product has not been lasting as well as we would expect.

## Oranges



While Valencia is a critical growing area for oranges, we are continuing to source from the Southern Hemisphere for at least another month, so are not expecting any short-term issues. However, there will be an impact on the market more generally.

## Asparagus



There have been some minor quality issues with asparagus, but we have introduced additional checks with the grower to minimise any impact on customers.

## Cauliflower



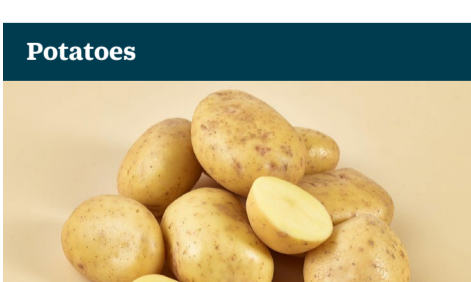
We are expecting some Spanish supply next week, which will help to support British growers. This will continue through the winter and will help mitigate any supply issues.

## Citrus – Valencia region



Valencia received heavy rainfall and has been one of the worst affected regions. As such, growers were unable to access orchards last week, so very little fruit has been picked and despatched.

## Potatoes



Overall potato volumes for this year's harvest look to have improved on last year but remain lower than the ten-year average. Availability will depend on the variety, with salad potatoes significantly lower than last year and, along with large bakers, likely to face some problems later in the season.

## MEET OUR SUPPLIERS

Working together to serve our customers produce and products

To learn more about our suppliers, SCAN THE QR CODE.