



# Market Review

Summer 2025



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# Introduction



**By Andy Pembroke**

Managing Director, Fresh Direct

**The Summer 2025 biannual Market Review from our expert fresh produce team is designed to provide you with industry-leading category insight from across Fresh Direct as well as useful market trends and economic data.**

The sourcing and supply of quality fresh produce and ingredients remains central to the growth and investment plans of the Sysco business. Fresh Direct continues to benefit from significant investment in our overall infrastructure, manufacturing capabilities, distribution and technology platform, ensuring we can constantly adapt to the needs of our customers. As part of Sysco GB group of businesses, Fresh Direct continues to make significant progress, operating the most efficient national network serving our customers 6 days a week nationwide.

I've spent time with many of our growers in recent months both abroad and in the UK and having seen up close the care, passion and innovation that goes into growing our crops, I fervently believe we work in partnership with the very best growers in the marketplace.

2025 continues to deliver significant challenges for our industry with many macroeconomic factors affecting everyone. Our expert and highly experienced team constantly review our supply chain and work closely with partner suppliers to maximise product supply and quality.

We continue to rollout our successful strategy of buying more produce directly from growers, both in the UK and overseas. This provides Fresh Direct with more control and places us in a better position to manage costs and supply challenges. Also having long-term contracts and supply agreements in place with suppliers has helped secure product quality and availability in an extremely challenging trading environment.

We are totally committed to working with British farmers and producers wherever possible, our produce experts are focussed on sourcing an ever-growing range of British products and ingredients for Fresh Direct customers. As we move towards the summer UK growing season with an ever-growing

range of fabulous and delicious locally grown produce, I am waiting in anticipation for my firm favourite, the Victoria blackberry that will appear later in the season. We are extending the British growing season wherever possible and support innovation such as our vertical farming initiatives. We will however continue to secure the freshest in season produce, sourcing from areas where the best quality is available.

This year will see us launch many new and innovative products including purple sweet potato, purple sprouting broccoli, and round courgettes. Other new products we are bringing to market include vertically farmed British Baby Kale and Komatsuna. Customers are also enjoying crownless pineapples, designed to reduce food waste in the kitchen, as the green leaves are often just discarded.

We continue to work closely with our suppliers and to emphasise our commitment to sustainable farming practices. More of our suppliers have achieved B Corp status including our biggest supplier of aubergines, peppers and courgettes as well as the British grower of our vertically grown basil.

Thank you for your continued support and for putting your trust in Fresh Direct as your fresh produce and speciality ingredients supplier. We look forward to serving you in 2025.

# Industry challenges

Key macroeconomic factors affecting economic confidence, food prices and availability



## Labour markets

Employer NICs rose 1.2ppts to 15% in Autumn 2024, raising business concerns. From April 2025, the National Living Wage increases to £12.21, and the Minimum Wage for 18-20-year-olds to £10.00.



## Inflation

The Bank of England forecast published in February expects the inflation rate to rise to 3.7% by the third quarter of 2025, before easing, but remaining above 2% until the fourth quarter of 2027.



## Israel-Gaza and Ukraine wars

Food security and availability have been directly impacted by the continuation of these two wars. Global leaders are now focused on resolving both over the coming months.



## Shipping

The global logistics and shipping industry continue to face challenges in 2025 that are reshaping supply chain dynamics and testing the resilience of businesses worldwide.



### **Opportunities for growth**

The UK government aims to boost economic growth, targeting the highest sustained growth in the G7. Despite slow growth since 2008, the Bank of England's 2025 forecast is 0.75%, down from 1.5%.



### **Haulage**

Rising operating costs, driver shortages and inadequate road infrastructure continue to add pressure on businesses supplying food and fresh produce in the UK.



### **Changing world orders**

The whole world is watching with interest with the advent of America's 47th president as Donald Trump takes office for his second term.



### **Extreme weather**

2024 was the world's hottest year on record. This caused challenges to the fresh produce category and affected the cost of product across the whole supply chain.

## Labour markets

The Office for National Statistics (ONS) labour market overview for the UK in February 2025 reports that estimates for payrolled employees in the UK decreased by 14,000 between November and December 2024 but rose by 44,000 (0.1%) between December 2023 and December 2024.

Payrolled employees fell by 3,000 (0.0%) over the quarter but rose by 106,000 (0.3%) over the year, when looking at October to December 2024.

The UK employment rate for people aged 16 to 64 years was estimated at 74.9% in October to December 2024. This is above estimates of a year ago, and up in the latest quarter.

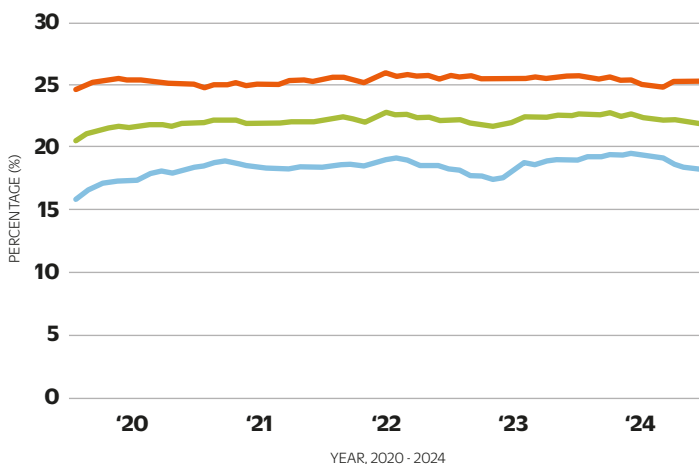
The UK economic inactivity rate for people aged 16 to 64 years was estimated at 21.5% in October to December 2024. This is below estimates of a year ago, and down in the latest quarter. The UK Claimant Count for January 2025 increased on the month and is up on the year, at 1.750 million.



### Economic inactivity rate decreased on the year and in the latest quarter

UK economic inactivity rates, people, men and women aged 16 to 64 years, seasonally adjusted, between December to February 2020 and October to December 2024

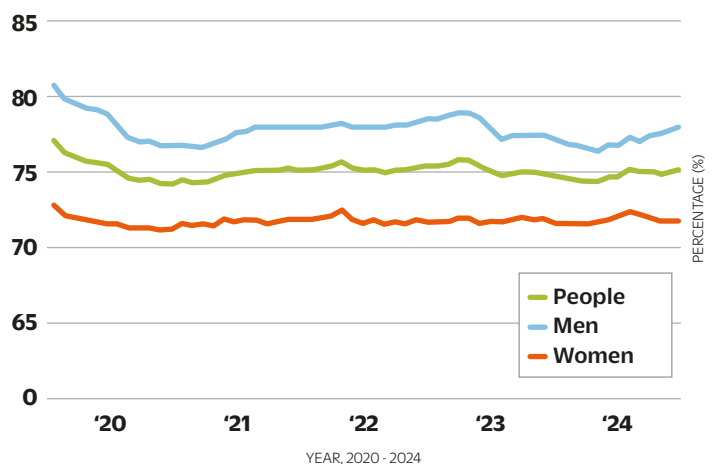
Source: Labour Force Survey (LFS) from the Office for National Statistics



### Employment rate increased both on the year and in the latest quarter

UK employment rates, people, men and women aged 16 to 64 years, seasonally adjusted, between December 2019 to February 2020 and October to December 2024

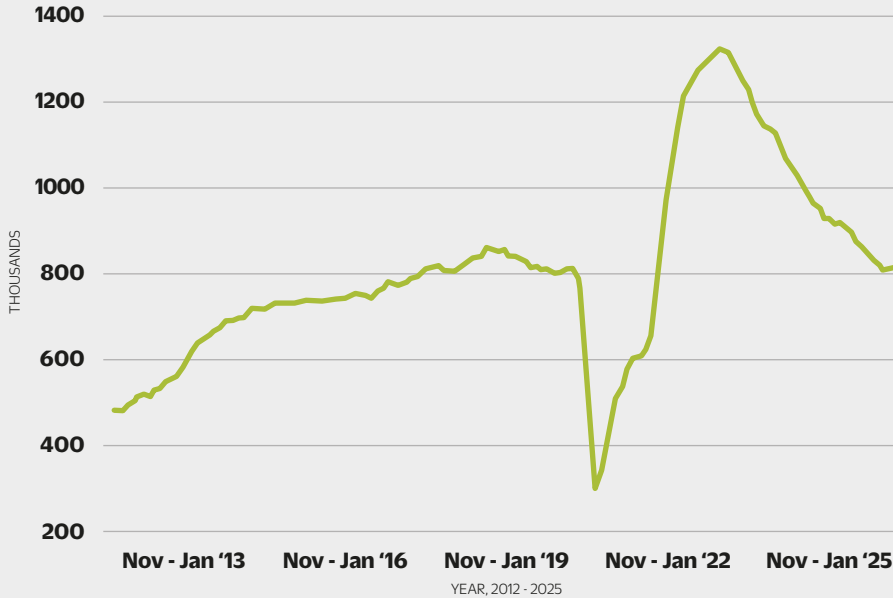
Source: Labour Force Survey (LFS) from the Office for National Statistics



## Estimated number of vacancies decreased on the quarter, for the 31st consecutive period, to 819,000

Number of vacancies in the UK, seasonally adjusted, November 2012 to January 2013, to November 2024 to January 2025

Source: Vacancy Survey from the Office for National Statistics



The estimated number of vacancies in the UK decreased by 9,000 on the quarter to 819,000 in November 2024 to January 2025. Vacancies decreased on the quarter for the 31st consecutive period but are still above pre-coronavirus (COVID-19) pandemic levels.

The UK unemployment rate for people aged 16 years and over was estimated at 4.4% in October to December 2024. This is above estimates of a year ago, and up in the latest quarter.

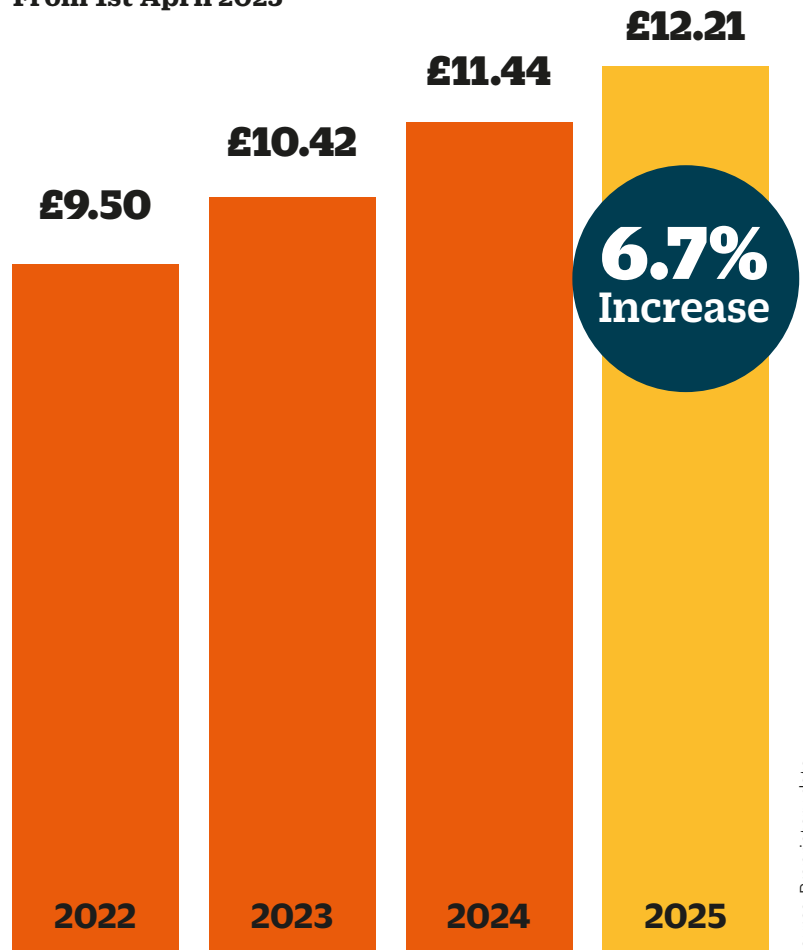
## National Living Wage and National Minimum Wage

From April 2025, the National Living Wage (NLW) will increase from £11.44 to £12.21 per hour, a 6.7% increase or 77 pence. This means it will have risen 40% in the past five years.

Combined with the changes in NICs, this is likely to increase annual wage inflation by around 10%. For those employees aged 18-20 a £1.40 increase taking the National Minimum Wage to £10.00 and representing a 16.3% rise per hour.

Age	April' 24	% increase	April' 25
21 and over	£11.44	6.7%	£12.21
18 to 20	£8.60	16.3%	£10.00
Under 18	£6.40	18.0%	£7.55

## Increase in hourly rates From 1st April 2025



Source: Proprietary data

# Consumer price inflation

The Consumer Prices Index including owner occupiers' housing costs (CPIH) rose by 3.9% in the 12 months to January 2025, up from 3.5% in December 2024.

On a monthly basis, CPIH was little changed in January 2025, compared with a 0.4% fall in January 2024.

The owner occupiers' housing costs (OOH) component of CPIH rose by 8.0% in the 12 months to January 2025, unchanged from the 12 months to December 2024. This is the joint-highest annual rate since February 1992 in the constructed historical

series. OOH costs rose by 0.4% on the month, the same rate as a year earlier.

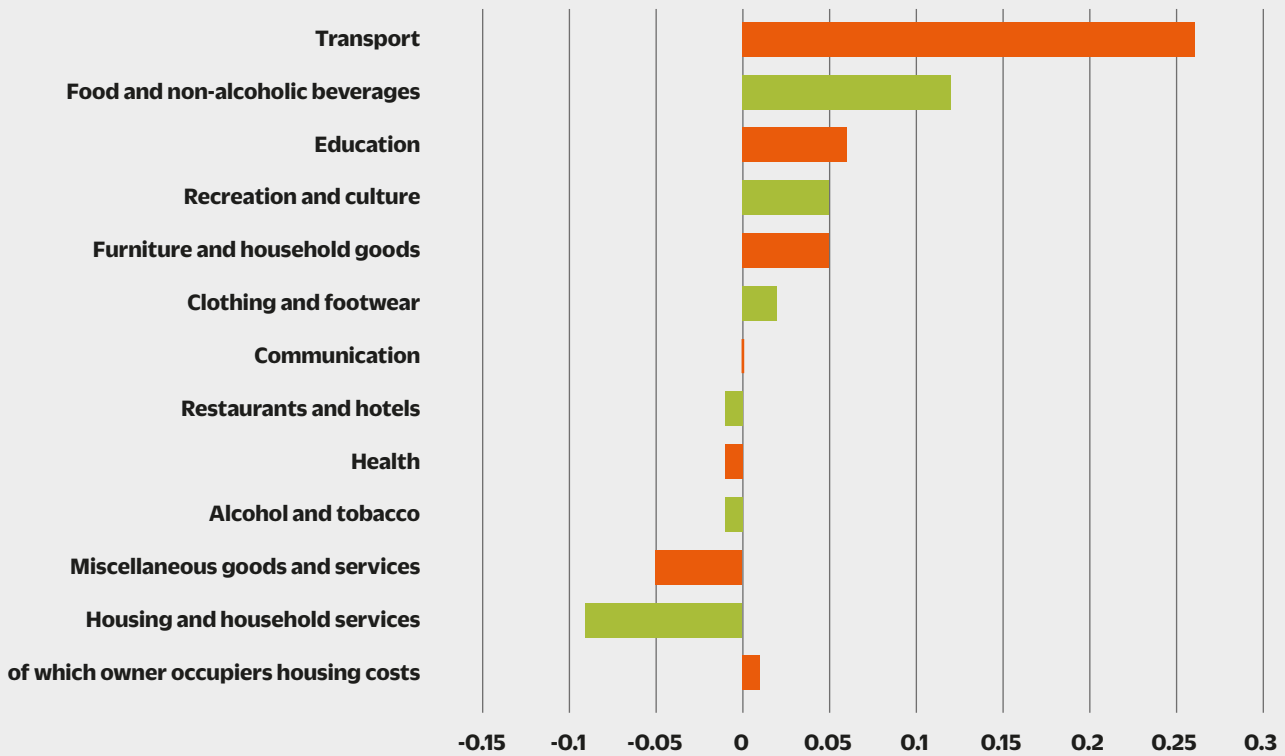
The Consumer Prices Index (CPI) rose by 3.0% in the 12 months to January 2025, up from 2.5% in December 2024.

On a monthly basis, CPI fell by 0.1% in January 2025, compared with a 0.6% fall in January 2024.

## Upward contributions to the change in annual CPIH inflation from six divisions, led by transport

Contributions to change in the annual CPIH inflation rate, UK, between December 2024 and January 2025

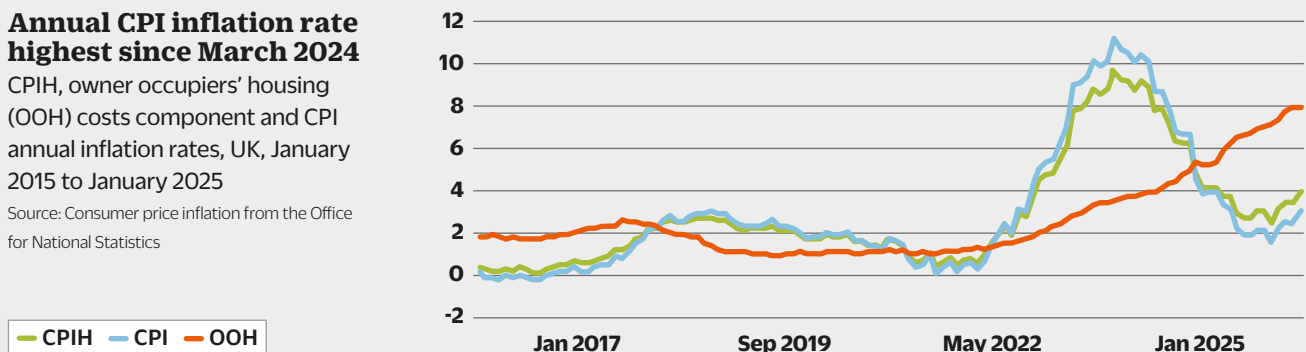
Source: Consumer price inflation from the Office for National Statistics



## Annual CPI inflation rate highest since March 2024

CPIH, owner occupiers' housing (OOH) costs component and CPI annual inflation rates, UK, January 2015 to January 2025

Source: Consumer price inflation from the Office for National Statistics





## Food price inflation

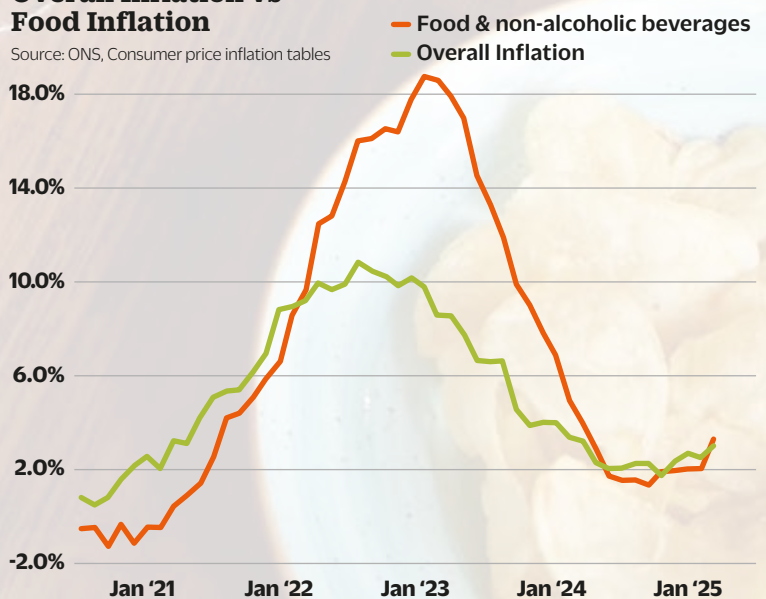
The Office for National Statistics reported on 19th February 2025 that food and non-alcoholic beverage prices rose by 3.3% in the year to January 2025, up from 2.0% in December 2024.

Prices for this division rose by 0.9% in January 2025, up from a monthly fall of 0.4% a year ago. The annual rate of 3.3% in January 2025 compares with 7.0% to January 2024.

There were upward contributions to the change in the annual rate of inflation between December 2024 and January 2025 in 7 of the 11 food and non-alcoholic beverages classes. This is because prices rose this year but either fell or rose at a slower rate between the same two months last year.

### Overall Inflation vs Food Inflation

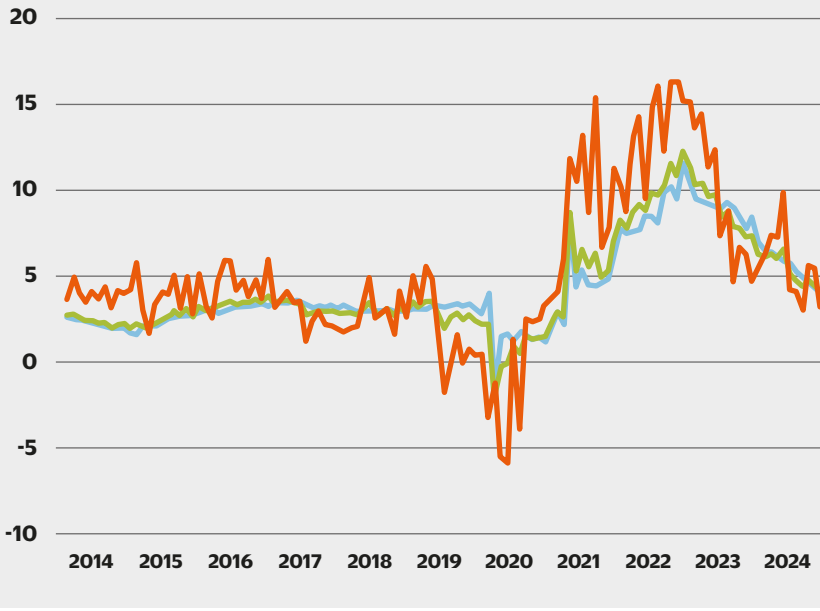
Source: ONS, Consumer price inflation tables



## Annual inflation rate for restaurants and hotels lowest since July 2021

Restaurants and hotels, restaurants and cafes, and accommodation services annual inflation rates, UK, December 2014 to December 2024

Source: Consumer price inflation from the Office for National Statistics



## Restaurants and hotels

The annual inflation rate for restaurants and hotels was 3.4% in December 2024. This is down from 4.0% in November and is the lowest annual rate since July 2021. On a monthly basis, prices fell by 0.1%, compared with a rise of 0.5% a year ago.

The easing in the annual rate mainly reflected a downward effect from hotels, where prices fell by 1.9% on the month, compared with a rise of 3.1% a year ago. Restaurants and cafes provided a smaller downward effect, where prices rose by 0.2% on the month. This is down from the 0.3% monthly rise a year ago.

- Restaurants and Hotels
- Restaurants and Cafes
- Accommodation services



## Inflation: International comparisons

On 5th February 2025 the governor of the Bank of England stated that inflation, the rate at which prices rise, is now expected to rise to 3.7% and take until the end of 2027 to fall back to its 2% target.

A recent report on 5th February 2025 from the House of Commons Library has compared the UK's inflation performance against other countries using the Harmonised Index of Consumer Prices (HICP) or the CPI as it is known in the UK.

EU inflation was 2.7% in December, up from 2.5% in November. In December 2023, EU inflation was 3.4%.

Inflation in the Eurozone (the EU member states that use the euro as their currency) is provisionally estimated as 2.5% in January up from 2.4% in December. In January 2024, Eurozone inflation was 2.8%.

In Germany, inflation is provisionally estimated as 2.8% in January, unchanged from December. In France, inflation is provisionally estimated as 1.8% in January, unchanged from December. Romania had the highest inflation rate in the EU in December at 5.5%. Ireland had the lowest inflation rate at 1.0%.

**UK inflation was 2.5% in December 2024, down from 2.6% in November. UK inflation was 4% in December 2023.**

### Inflation rates: selected countries

Annual % change in consumer prices (HICP)

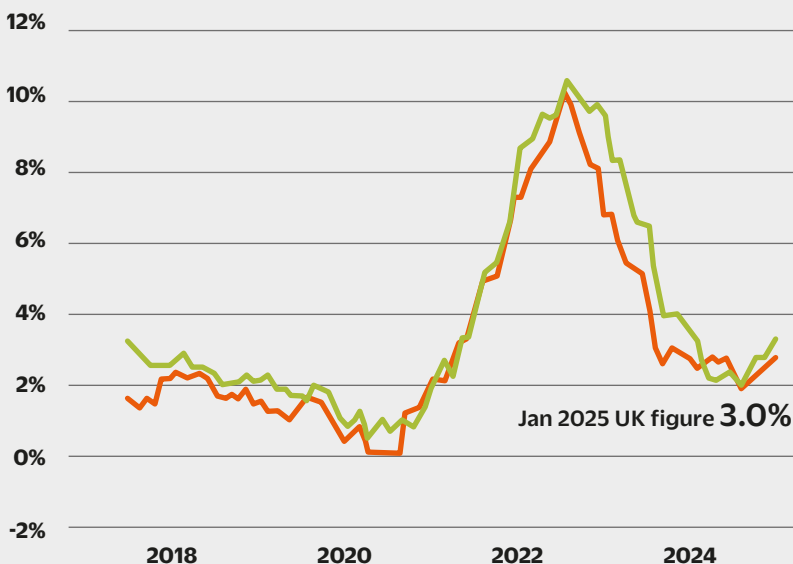
Source: ONS, Eurostat

Region	2022	2023	2024	Nov 24	Dec 24	Jun 24
UK	9.1	7.3	2.5	2.6	2.5	..
Eurozone	8.4	5.4	2.4	2.2	2.4	2.5
EU	9.2	6.4	2.6	2.5	2.7	..
France	5.9	5.7	2.3	1.7	1.8	1.8
Germany	8.7	6.0	2.5	2.4	2.8	2.8

### Inflation

Annual % change in consumer prices (HICP)

Source: House of Commons Library



# Gross Domestic Product

**Gross domestic product (GDP) estimates as the main measure of UK economic growth based on the value of goods and services produced during a given period. In cash terms, GDP was £2,848 billion in 2024.**

GDP is estimated to have grown by 0.1% in October-December 2024 (Quarter 4) compared to the previous three-month period (July to September). GDP was flat (0.0% growth) in Quarter 3. GDP grew by an estimated 1.4% in 2024 compared to 2023.

The services sector grew by 0.2% in Quarter 4 and construction grew by 0.5%, but production fell by 0.8%.

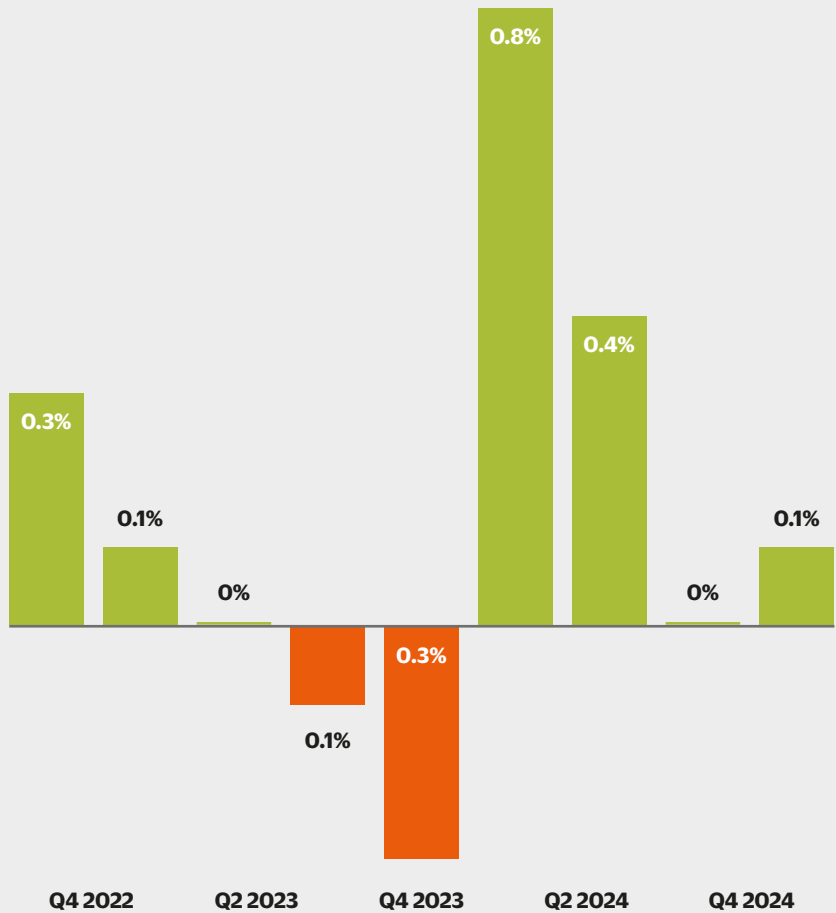
GDP is estimated to grow by 0.4% in December compared to November. This followed growth of 0.1% in November.

The services sector grew by 0.4% in December and production grew by 0.5%, but construction fell by 0.2%.

## UK economy edged up at the end of the year

Quarterly GDP growth in the UK, Oct to Dec 2022 to 2024

Source: Office for National Statistics



## GDP Growth Forecasts

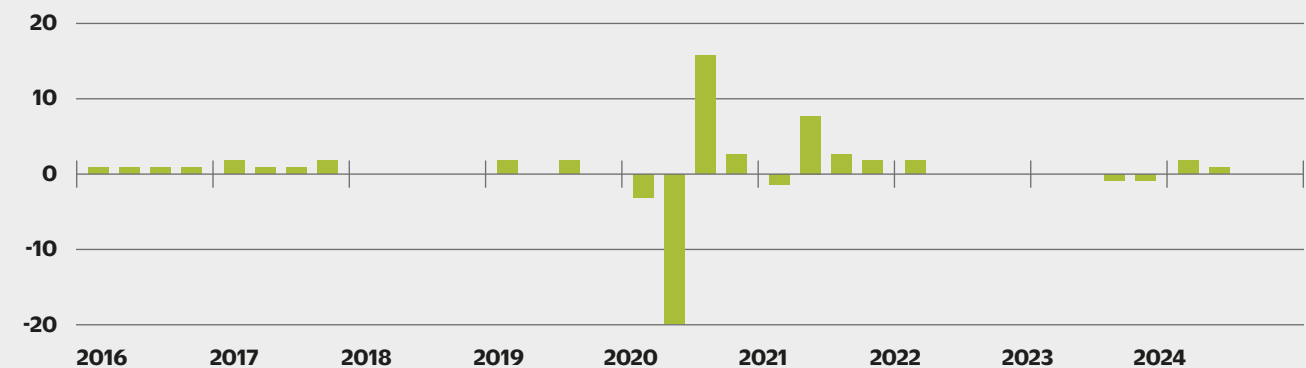
The Office for Budget Responsibility (OBR), in their Economic and fiscal outlook (October 2024) forecast a 1.1% growth in 2024 and 2.0% in 2025.

The Treasury's January 2025 survey of independent forecasts showed an average of 0.8% for 2024 and 1.2% for 2025.

## GDP growth, % change on quarter

Calendar quarters

Source: House of Commons Library



## Growth prospects for the UK

The government has set an ambition to raise the growth rate of the UK economy. Faster growth in GDP could help deal with some of the economic and social challenges facing the UK.

HM Government, Plan for Change, Milestones for mission-led government states “Economic growth is the number one mission for the Government”, it continues

“This Government will aim for the highest sustained growth in the G7”

The period since the global financial crisis in 2008/09 has seen slow UK economic growth. GDP, which measures the volume of goods and services produced in the economy, rose by an annual average of 1.1% from 2008 to 2023. This was little more than a third of the annual 2.9% pace averaged over the decade to 2007. Weak growth has subsequently contributed to the UK’s economic, fiscal and social challenges.

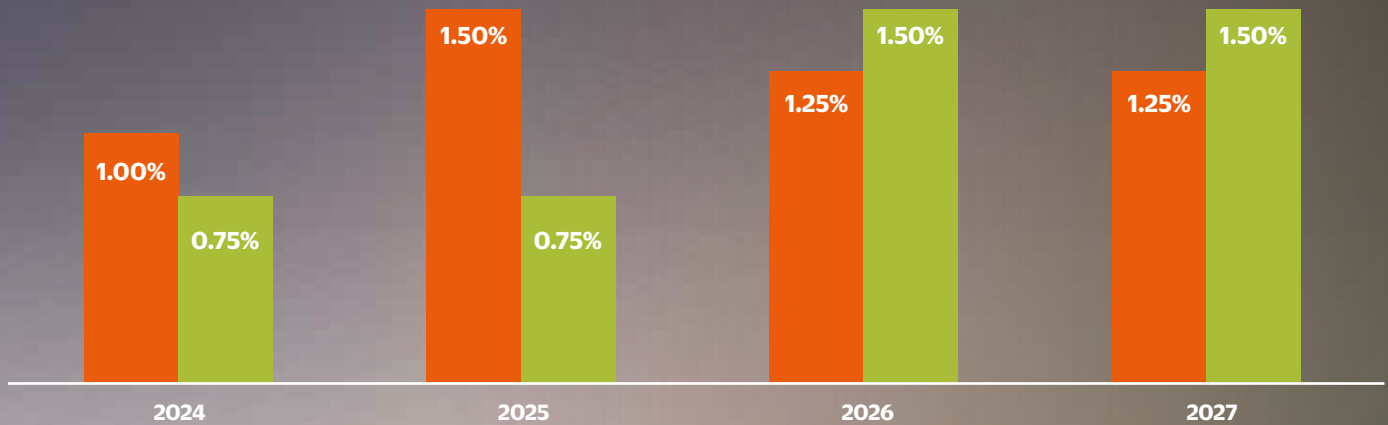
The CBI (Confederation of British Industry) Lead Economist has said that “The budget has set off warning lights for business. The hike in National Insurance Contributions alongside other increases to employers’ cost base will add to the burden on business. And is expected to trigger a more cautious approach to pay, hiring and investment”.

### The Bank of England has halved its growth forecast for this year

Annual real GDP growth forecasts in Nov 2024 and Feb 2025, figures rounded to the nearest 0.25%

Source: Bank of England

— Nov 2024 — Feb 2025



The Bank of England, on the 6th February has halved its growth forecast for this year as it cut interest rates to the lowest level for 18 months. The economy is now expected to grow by 0.75% in 2025, the Bank said, down from its previous estimate of 1.5%. While it cut its growth forecast for this year, the Bank upgraded its predictions for both 2026 and 2027. The economy is now forecast to grow by 1.5% in both of those years, up from 1.25%.



# Business and consumer confidence in the United Kingdom

The Consumer Confidence Survey measures the level of optimism that consumers have about the performance of the economy in the next 12 months. The Growth from Knowledge (GfK) consumer index is derived from a sample of around 2,000 consumers. They are asked to rate the relative level of past and future economic conditions including overall economic situation and savings levels, personal finance situation and climate for major purchases.

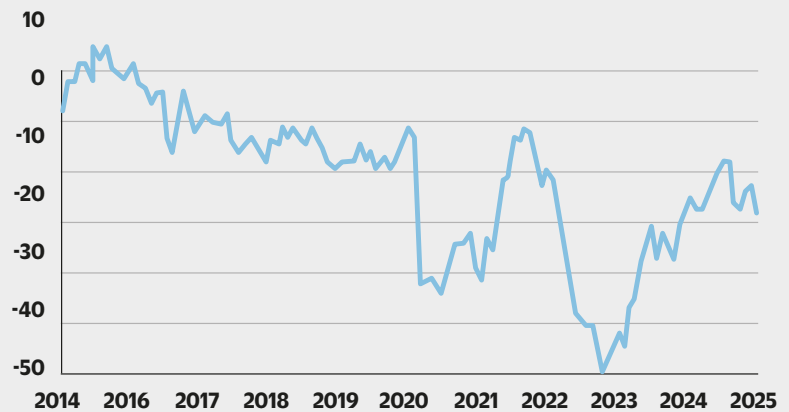
UK consumer confidence fell sharply in January to the lowest level in more than a year as a rise in government borrowing costs and warnings of job cuts took a toll on economic sentiment. Consumer confidence provides a forward-looking measure of household spending, reduced confidence means people are more likely to save than spend.

The month-on-month drop in the GfK consumer confidence index was the largest since September 2024, when consumers were concerned about potential tax rises in October’s Budget. The Overall Index Score decreased by five points to -22 in January. All measures were down in comparison with the previous month.

Neil Bellamy, consumer insights director at GfK, stated “These figures underline that consumers are losing confidence in the UK’s economic prospects”.

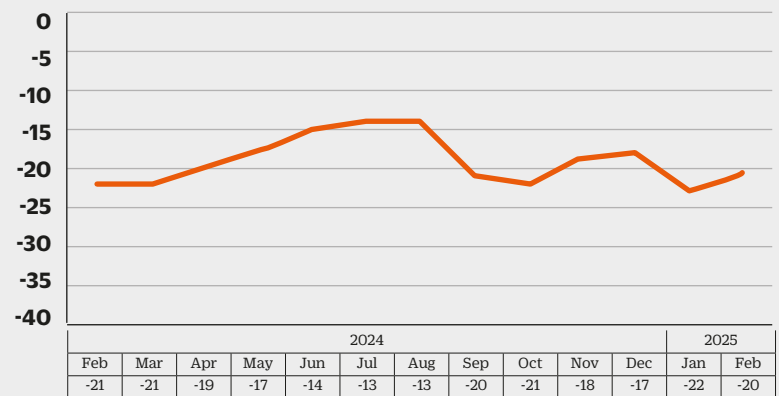
## UK consumer confidence fell in January

Source: GfK consumer confidence index



## Index score February 2024-February 2025

Source: GfK Consumer Confidence Barometer (Jan 2025)



## UK Consumer confidence measures - January 2025

Source: GfK Consumer Confidence Barometer (Jan 2025)

Measure	▲▼	Jan 25	Dec 24	Nov 24	Jan 24
<b>Overall Index Score</b>	<b>+5</b>	<b>-22</b>	-17	-18	-19
Personal financial situation over last 12 months	-3	-10	-7	-9	-12
Personal financial situation over next 12 months	-3	+2	1	1	0
General economic situation over last 12 months	-7	-46	-39	-39	-41
General economic situation over next 12 months	-8	-34	-26	-26	-21
Major Purchase Index	-4	-20	-16	-16	-20
Savings Index	+9	30	21	24	27

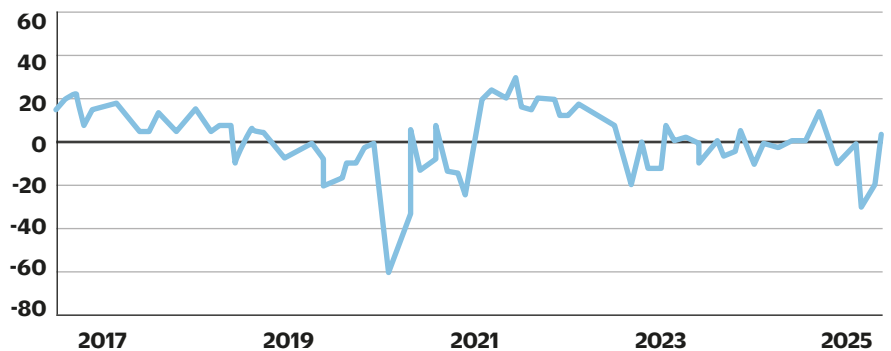


### CBI Industrial Trends Survey

The CBI carries out monthly and quarterly industrial Trend Surveys. In January 2025, more manufacturers thought that output would decrease over the next three months than thought it would increase. The difference was -19% of manufacturers, up from -31% in December 2024.

### Future output expectations % balance expecting improvement / deterioration

Source CBI Industrial Trends Survey



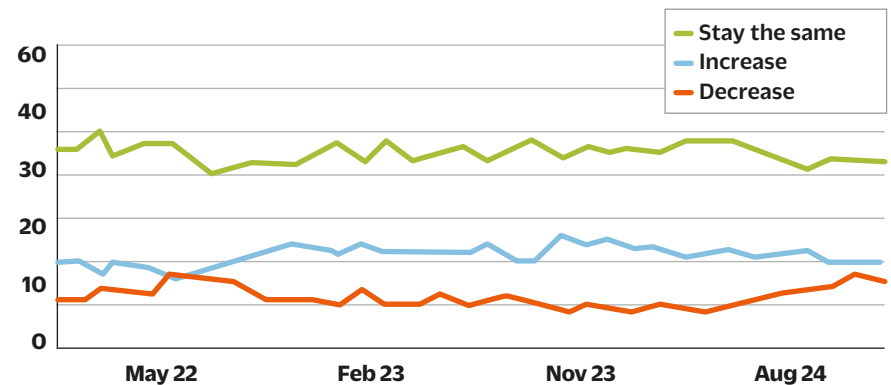
### Office of National Statistics (ONS) Business Insights and Conditions Survey

The ONS conducts a voluntary survey of business to look at the impact of challenges facing the economy.

In the two weeks ending 19th January 2025, 20.6% of respondents thought their business's performance would increase over the next 12 months. 16.7% thought it would decrease.

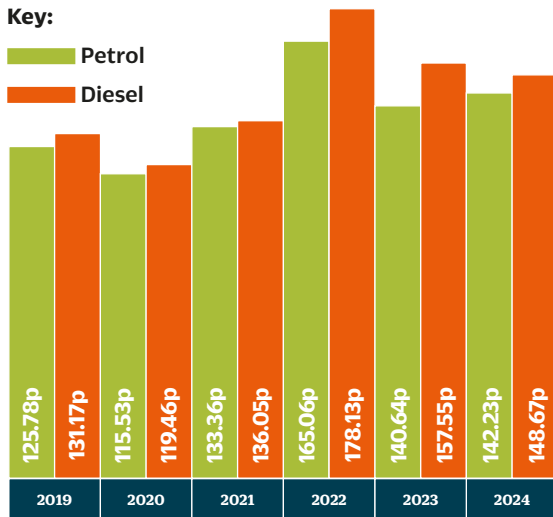
### Business performance % of business expecting their performance over the next year to:

Source ONS Business Insights and Conditions Survey



## Average UK petrol and diesel prices

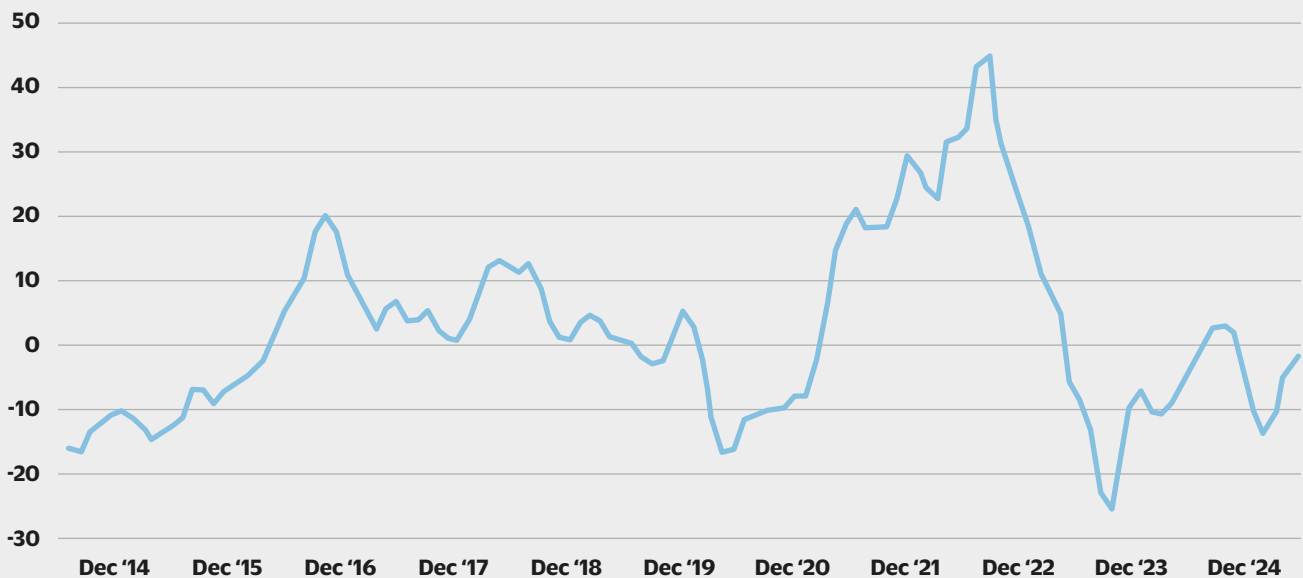
The Office for National Statistics, Consumer price inflation, February 2025 reported that the average price of petrol rose by 0.8 pence per litre between December 2024 and January 2025 to stand at 137.1 pence per litre, down from 139.9 pence per litre in January 2024. Diesel prices rose by 1.5 pence per litre in January 2025 to stand at 144.1 pence per litre, down from 148.3 pence per litre in January 2024. These movements resulted in overall motor fuel prices falling by 2.2% in the year to January 2025, up from a fall of 5.0% in the year to December 2024.



### Annual transport inflation at strongest rate since February 2023

Motor fuel annual inflation rates UK, January 2015 to January 2025

Source: Consumer price inflation from the Office for National Statistics





## President Donald Trump

**Donald Trump was sworn in as the 47th US President in January 2025. His decisions will have important implications for countries around the world including the United Kingdom.**

**Donald Trump signed dozens of executive orders in his first weeks back in office including imposing tariffs on trading partners, exiting the World Health Organisation (WHO) and withdrawing from the Paris climate agreement with immediate effect.**

“Tariff” Donald Trump has said many times, “is the most beautiful word in the dictionary”. It is a negotiating tactic to try and force concessions from some of America’s biggest trading partners on often unrelated issues. Michael Saunders of Oxford Economics said that the UK is not “in the front line of

countries” that would be impacted. However, the IMF cautions that any trade war between the US and large EU exporters such as Germany would have knock-on effects for the UK economy.

## Israel-Gaza and Ukraine wars

### Israel-Gaza

The conflict in the Middle East and the efforts to return to peace are fast-moving and at times confusing. A 42-day (six week) temporary ceasefire came into effect from 19th January 2025. The next phases of the ceasefire still needs to be negotiated.

Israeli hostages and Palestinian detainees have started to be released. Hundreds of aid trucks have entered Gaza, bringing a small fraction of food, clean water, and medical supplies, food and shelter to those who desperately need it. Many people are returning to their homes, to find them destroyed.

### Ukraine

February 2025 marked 3 years since Russia invaded Ukraine.

Russia and Ukraine together account for approximately 20% of the world’s cereal grain production. The war continues to cause major disruption to the supply and price of products such as wheat and sunflower oil.

# Transportation

## Shipping

Global shipping challenges have continued in 2025 with extreme weather and the wars in Israel-Gaza and Ukraine creating bottlenecks around the world, adding delays, uncertainty and increased costs of maintaining supply chain integrity. This has created an extremely complex and dynamic operating environment for shipping companies and carriers alike.

The conflict in the Middle East changed international trade routes and the number of container ships using the Suez Canal dropped dramatically as they rerouted around the Cape of Good Hope.

This added up to 10 days to their journey time and cost an additional \$1m per ship. However, with security in the Red Sea gradually improving, the Suez Canal is beginning to gear up once again to handle global trade at full capacity, signalling the return of stability to this vital maritime corridor, the Suez Canal Authority (SCA) has reported. It remains to be seen how long this adjustment will take.

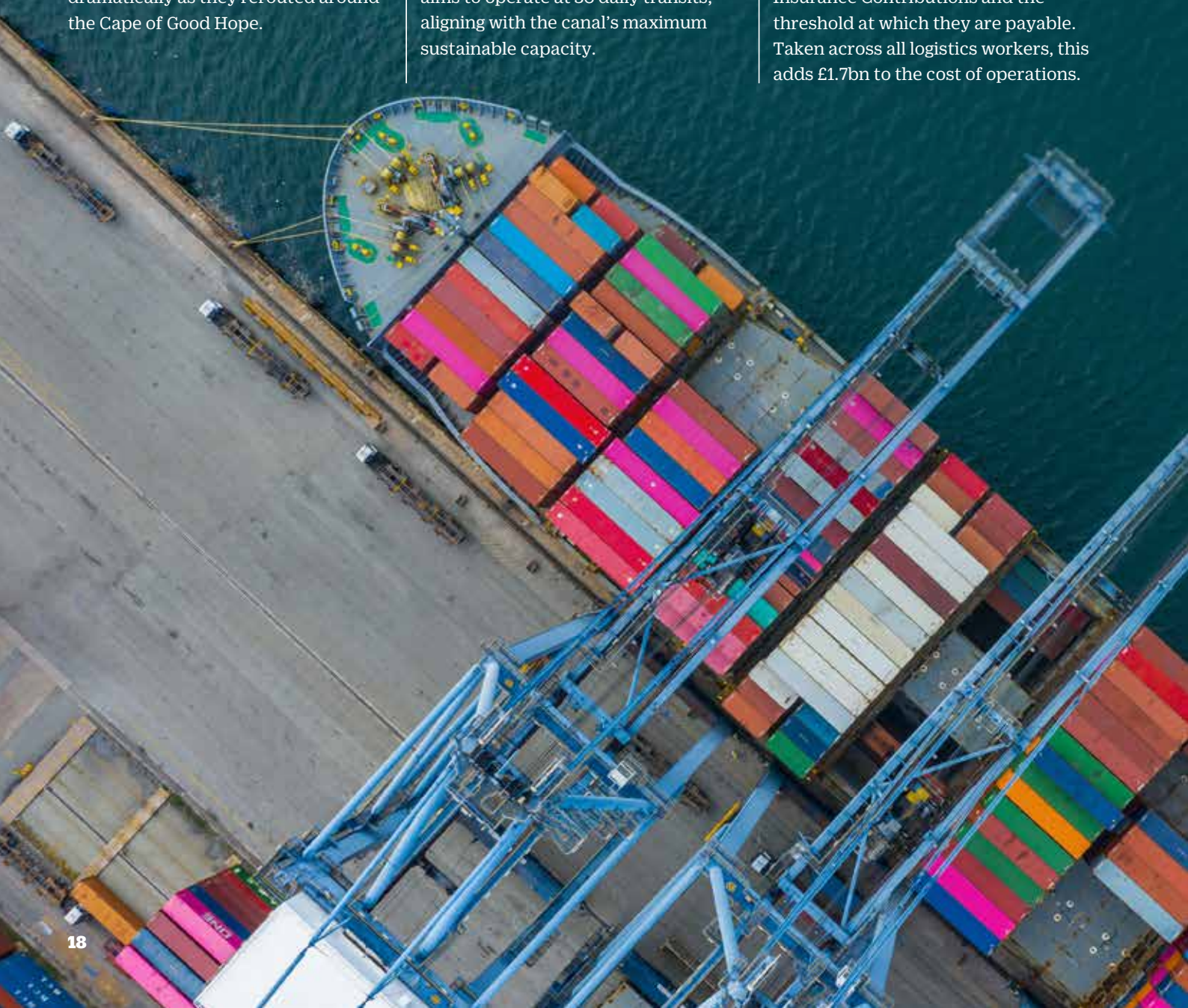
The Panama Canal has been operating with reduced transit capacity caused by low water levels in the Gatun Lake, used to operate the canal's locks. Water levels have now improved, and The Panama Canal Authority (PCA) aims to operate at 36 daily transits, aligning with the canal's maximum sustainable capacity.

## Haulage

Hauliers transporting food and fresh produce continue to face a number of factors outside their control that are adversely affecting their costs.

The Transport Exchange Group (TEG) Road Transport Price Index has reported a reduction in transport prices in January 2025.

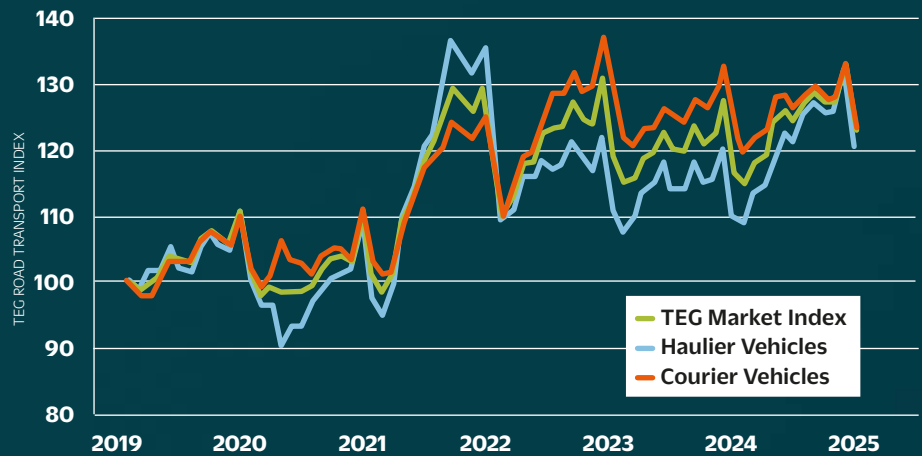
Paul Sanders, chairman of The Association of Pallet Networks states "The autumn budget introduced a few items of great concern, not least the changes to employer's National Insurance Contributions and the threshold at which they are payable. Taken across all logistics workers, this adds £1.7bn to the cost of operations.



**Routing around the Cape of Good Hope has added up to 10 days to their journey time and cost an additional \$1m per ship.**

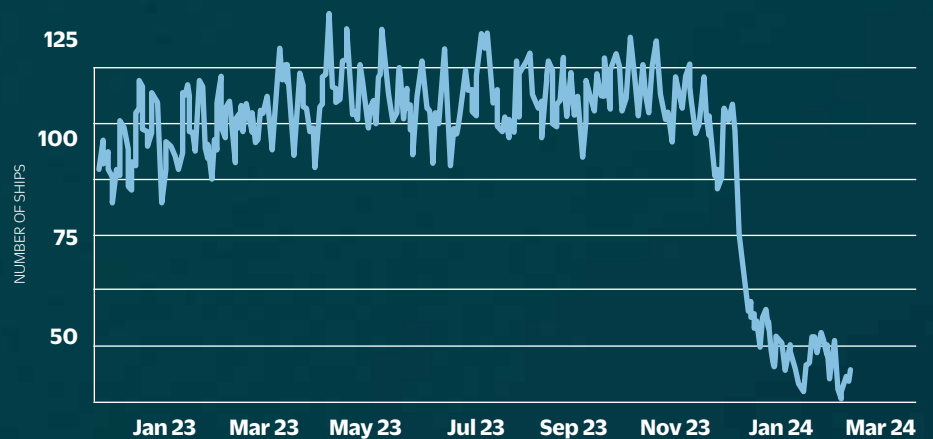
### The TEG price index

The TEG Road Transport Price Index tracks the average prices paid for UK haulage and courier services, month by month.



### Daily number of container ships in the Red Sea

Source: Kiel Trade Indicator. The Kiel Trade Indicator estimates trade flows (imports and exports) of 75 countries worldwide, the EU and world trade as a whole.



### Daily number of moving operating container ships

Source: Kiel Trade Indicator. The Kiel Trade Indicator estimates trade flows (imports and exports) of 75 countries worldwide, the EU and world trade as a whole.



# Extreme weather

**January 2025 was the warmest January ever recorded, directly after 2024 was confirmed as the world's hottest year on record. Climate change represents the defining challenge of the 21st Century, for both society as a whole and the entire business community.**

The relentless emission of greenhouse gases by humans is changing the climate and exacerbating the effect of extreme weather throughout the world. When fossil fuels are burnt to make energy, gasses are released and trap heat in the Earth's atmosphere, making the planet warmer.

The record-breaking temperatures this January have taken scientists by surprise. Experts were predicting that it would be slightly cooler than January 2024 because a weather pattern called El Niño had finished. However, January 2025 broke the records by almost 0.1°C.

When the Eastern Pacific Ocean becomes warmer than normal it forms a weather pattern called El Niño. This can change the weather around the world, causing hotter temperatures, stronger storms and less rainfall. This year however a different weather pattern known as La Niña is developing and it was expected to lead to a cooler January.

Adam Scaife, head of monthly predictions at the Met Office, which monitors UK weather said: "If you'd asked me a few months ago what January 2025 would look like relative to January 2024, my best shot would have been it would be cooler. "We now know it isn't, and we don't really know why that is."

Gavin Schmidt, a scientist from Nasa, says that even though scientists know the Earth is warming because of greenhouse gases, experts are still trying to understand why 2023, 2024, and the start of 2025 were so much hotter than expected.

He said: "The basic reason we're having records being broken, and we've had this decades-long warming trend, is because we're increasing the amount of greenhouse gases in the atmosphere.

January 2025 is the 18th month in the last 19 months which saw the global average surface air temperature more than 1.5C above the pre-industrial level. All this has come against the backdrop of President Donald Trump stating he will end previous leader Joe Biden's policies of "climate extremism" and his preference to extract more fossil fuels for the US. This is all despite 2024 being confirmed as the world's hottest on record, crossing the 1.5C threshold agreed in the 2015 Paris Agreement.

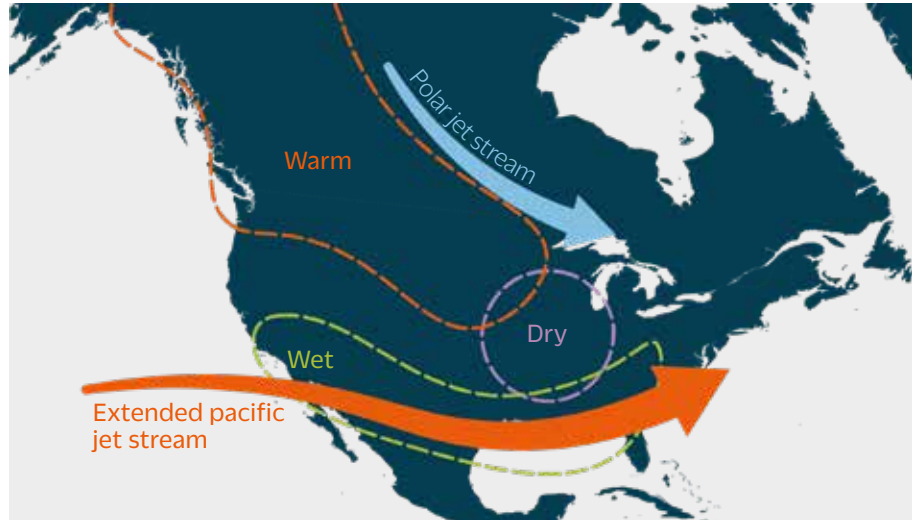
Emeritus professor of geophysical and climate hazards at UCL, Bill McGuire, called the data "astonishing and, frankly terrifying".

Extreme weather continues to cause major challenges for crops and livestock as well as negatively impacting the growing conditions of many categories and causing crop damage and quality issues.





**El Niño:** Characterised by unusually warm Pacific sea surface temperatures, leading to global weather disruptions and increased rainfall in some regions.



**La Niña:** Marked by cooler Pacific sea surface temperatures, causing droughts in some areas and cooler conditions globally.



### Global average surface temperature since 2000

Measured in global temp difference above pre-industrial (°C) Source: Met Office



# Government Relations: advocating for the industry



## Our business grows when our customers and suppliers thrive

Our Government Relations programme aims to ensure that the Government and its policy changes are supportive of our growth. With 335 new MPs (over half the House), we've got a lot of work to do to raise the profile of the industry, and the understanding of the implications of policy change.

Our teams are meeting local MPs up and down the country, building relationships that will last the duration of Parliament to raise awareness of our

role in the food system and how we're supporting you as our customers. Our Parliamentary drop-in event in November attracted over 40 MPs from across Parliament, and at the end of February we'll hold our first Parliamentary Reception to celebrate the UK's food supply chain.

These relationships enable us to advocate for policy change, and we've had some significant wins in the last year.



By Peter  
Statham

Peter Statham is Head of Sustainability & Government Relations, Sysco GB



**Extended Producer Responsibility** – advocating for a change in the definition of non-household waste has ensured that more of the products we supply to customers can be excluded from this tax, saving our customers money.



**Apprenticeship levy** – our lobbying for greater flexibility in the Apprenticeship Levy, to ensure that these funds can be spent on training our people, has resulted in the expansion to a Skills & Growth Levy, with shorter courses available and the removal of mandatory qualifications in English and Maths that aren't critical for every role.



**Holiday Activity and Food Programme** – in partnership with the charity we established, Meals & More, we've successfully lobbied for an extension to the programme to continue providing the funds to feed children during the school holidays.

**There is still a lot to do, and we know that recent announcements can be concerning with significant business impacts. If there are issues that you are advocating for and where you'd like our team's input and support, then please do get in touch. Here are a few of the key areas we're focused on today:**

**Circular Economy** The issue: The introduction of the Extended Producer Responsibility (EPR) and Deposit Return Scheme (DRS) can bring significant improvements to the UK's framework for packaging and recycling, fostering greater circularity of valuable resources within the UK market. However, the Welsh Government has diverged in the way they will operate DRS which will have a major impact on business. **Our ask of Government: Ensure wholesalers are included in the development of both these policies and there is as much regulatory alignment as possible between the nations of the UK.**

**Fleet Transition** The issue: With a fleet of over 2,000 vehicles, we are prepared to decarbonise our fleet upon receiving clear signals from the Government, ensuring that our investments align with operational benefits. **Our ask of Government: To consider providing subsidies to support the adoption of zero-emission vehicles, thereby enhancing uptake and reducing the overall costs of the technology.**

**Employment Rights (New Deal for Working People)** The issue: We are committed to engaging constructively with the Government throughout the Make Work Pay consultation period, ensuring that employment reforms achieve their intended objectives without creating unintended disruptions for businesses. **Our ask of Government: For any proposed changes to remain practical and workable for the wholesale sector, which relies on flexibility to navigate economic fluctuations and shifting workforce demands**

**Holiday, Activities and Food Programme** The issue: The Holiday, Activities and Food (HAF) programme extension 2025/26 will ensure children have access to nutritious meals and enriching activities throughout school holidays. However, more can be done to support a greater number of children in need. Sysco **Our ask of Government: To index-link any future funding arrangement for the programme and extend the scope so that all children experiencing food poverty are supported by this great initiative.**

**Business Rates** The issue: In the Autumn Budget, the Chancellor committed to reforming business rates by permanently lowering multipliers for retail, hospitality and leisure (RHL) properties with a rateable value (RV) under £500,000 from April 2026-27. Although the intention of this measure may be to tax the warehouses of online giants, there is no way of differentiating them with wholesalers, who will be faced with higher bills, severely risking business operations. **Our ask of Government: To amend the planned business rates proposals to protect the UK's food and drink supply chain.**

## Industry insight

# The future of foodservice



By Simon Stenning

Simon Stenning is the founder of FutureFoodservice.com, a forecasting and strategic advisory service for the foodservice and hospitality industry.

### A growth forecast for 2025

**The 2025 Future Foodservice report, with forecasts for the next 5 years, has outlined the growth that we expect to see in 2025 and beyond**

We've built up our forecasts with a top-down & bottom-up approach, looking at our Outlet Universe, economic macro-factors, societal changes, and consumer behaviors, and are forecasting that the total market will grow by +2.4% in 2025. This will take the total market for all eating & drinking out of home (excluding accommodation) to a total valuation of £105.3bn, a £2.4bn increase on our valuation for the market at the end of 2024.

Admittedly, this is lower than forecasted this time last year, as the October budget has impacted the economy and the potential profitability for foodservice operators. Some sectors including Fast Food and Contract Catering are growing faster than others such as Pubs & Restaurants.

We expect a challenging period for all operators, having to navigate with the significant tax and cost increases coming through.

We forecast that well-funded and managed branded businesses will survive, expand, and potentially thrive, as the economy improves and as consumers build confidence and disposable incomes.

**We are forecasting that the total market will grow by +2.4% in 2025.**





Indeed, when we look at the industry through the eyes of the consumer, the picture is rosier, and this is the key thinking behind our forecasts; there is going to be real wage growth this year, even with inflation again from April, there should also be positive impacts from the increased funding from Government into the public sector, plus we will see interest rates fall through 2025 he should forecast.

All of which points to a picture of consumers being better-off in 2025, and with confidence increasing, especially from the personal finance perspective, and savings levels having been built up, we believe that the appetite to spend will return more positively.

Hospitality has to develop in order to encourage consumers to spend; Matt Snell, CEO Gusto Italian was reported to say recently “You have to continue to be brave and try new things, you can’t stagnate”. We believe in the expression that ‘Demand is not finite’ and that when the industry creates and innovates, providing consumers with what they want, and even offers that they don’t know that they want, we will see more growth and successes in the market.



**We will also see the ongoing fault lines of ‘Friction-Free’ and ‘The Pleasure Principle’ being the keys to success and determining fortunes,**

We will see further polarisation, between value-driven social refuelling at one end, and experiential, premiumised dining at the other.

We will also see the ongoing fault lines of ‘Friction-Free’ and ‘The Pleasure Principle’ being the keys to success and determining fortunes, i.e. either increasing use of automation, digitalisation, technology and convenience, or increasing the pleasure delivered from less-frequent, more special, and expensive, experiences.

Price rises are going to help drive revenues, but operators have to be so careful in managing the level of increases as there are already items that are considered to be too expensive now – for example Fis & Chips in a food-led pub being £21.95, or a flat white in at £4.40; consumers need to get used to the new level of pricing, before facing any more major increases.

Some sectors will be able to pass on cost increases relatively comfortably, which is why we forecast that the value-end of the market spectrum will perform well this year. Roisin Currie, CEO Greggs, reported that the tax & cost rises would cost the business £135m, however in terms of a sausage roll, it would be pennies, and she does not expect to see any slowdown with their growth projections. It is the middle ground that will face difficulties unless the offer can be more innovative, updated or re-formatted.

So, the ‘Next 5 Years’ report forecasts are more positive than many may expect, based on a rounded view of looking at the consumer angle, but it relies on more operators remembering that ‘demand is not finite’ and consumers need to be inspired and encouraged, and they will spend their money.



**‘Demand is not finite’ ... when the industry creates and innovates, we will see more growth and successes in the market.**

**Industry insight from IGD**

# **Finding the pockets of profitability in 2025**



**57% of consumers would rather spend money on a good experience than on buying material possessions**

## A challenging but a more stable year ahead

The first quarter of the year is often the hardest for foodservice businesses as consumers cut back on eating and drinking out after the excess and expense of the festive season. As the evenings get lighter and the weather improves (hopefully) things start to look up but with a number of headwinds facing the industry, many operators may struggle to feel optimistic about the year ahead.

It would be naïve not to acknowledge the challenges that operators are facing: costs are rising (particularly labour) and inflation is not as low as hoped; only a third of consumers (the most affluent) feel confident about their finances, which is depressing discretionary spend and making foodservice volume growth hard to come by. As a result, profitability continues to be squeezed and investment decisions more difficult. And further afield, shifting global politics are casting doubt over long-standing relationships – and supply networks.

### Foodservice as an ally for growth

But there are positives. UK politics is more stable than we have seen for some time, and there are signs that a re-engagement with the EU may be on the cards which could offer direct benefits to foodservice in terms of simplified supply chains and more flexible labour sources. Most importantly we have a government hungry for economic growth.

To ensure the food and drink sector is seen as an ally for the government's growth agenda it needs to present a strong business case, demonstrating the relevance of the industry and the passion for success that we know exists. The foundations for this are already in place. Despite the current headwinds, foodservice plays a vital economic role at national and local levels. We as consumers love to socialise (when we can afford to do so), as proven by the post-covid bounce back, and our numerous pubs, bars, theatres, cafes and restaurants are valuable community assets. Now is the time to amplify those messages.

### “What can a ready meal not do?”

Although growth will continue to be driven by inflation in 2025, there will be pockets of profitability. So what should be on foodservice businesses' agenda this year?

Since the pandemic, operators' biggest competitors are not other operators, but retailers. To fight back, the away from home sector needs to ask itself how it can bring back consumers from retail - what can a ready meal (or home delivery) not do for them?

From axe throwing to fairground games, the rise of competitive socialising venues demonstrates that the desire to share experiences remains strong. Research from Barclaycard found that 57% of consumers would rather spend money on a good experience than on buying material possessions, up 5 percentage points since 2018. And a quarter say they plan to spend more on experiences and events this year than last, rising to 32% amongst those aged 18-34.



Talking of younger consumers, further education institutions are another highlight, with students seeking higher quality, 24/7 options that better reflect high street trends, whilst providing a launch pad for innovative new formats, such as high-tech vending and staffless stores. And these new uses of tech are also growing in the healthcare sector as hospitals aim to improve dining options for staff, visitors and patients around the clock whilst keeping labour costs under control.



By Nicola Knight

Nicola specialises in providing insight on global strategic developments and sector trends in the away from home and food-to-go channel. Nicola has 20 years' experience in the UK eating out sector, working with food manufacturers, wholesalers and customers in a range of marketing and insight roles.



## Rail passenger journeys up 14% as more businesses encourage a return to office-based working...

Other growth opportunities include travel locations with airport passenger numbers growing by 7.6% in 2024<sup>1</sup> and rail passenger journeys up 14%<sup>2</sup> as more businesses encourage a return to office-based working.

Long term shifts towards healthier and more sustainable diets must not be forgotten. The government has committed to achieving net zero by 2050 and, with food and drink accounting for about a third of emissions, the industry is vital to success. If businesses don't act, then measures will be imposed. It's a daunting challenge but the food industry is already moving in this direction and a plan has already been provided: find out more about the Net Zero Transition Plan for the UK Food System here.

### Five years on, we need to remember the lessons of the pandemic

Exploiting these “pockets of profitability” against the backdrop of a highly competitive and economically challenging environment requires the industry to pull together as much as it did in the days of the pandemic. Wholesalers such as Sysco sit at the centre of the foodservice supply chain and as such, play a vital role in collaboration between producers at one end and operators at the other.

It's hard for any operator to go it alone. Large or small, they need support. Obviously, price is important, but savings must be smart. Service and expertise are essential.

When consumers find their wallets squeezed, they shop around for the best deals, and operators are no different.

This means a lot of business will be up for grabs this year, with opportunities for suppliers to win market share, especially from smaller players with less purchasing power and support infrastructure. By using the insight and skills at their disposal to optimise ranges, hone efficiencies and drive innovation, forward-thinking wholesalers can become the trusted partner for operators.

As these changes to buying behaviour increase competition, no-one can rest on their laurels. Almost unbelievably, it was five years ago that the shock of the pandemic led to a period intense collaboration and innovation for the foodservice industry. The industry is facing different challenges now, but the resilient and agile mindsets demonstrated then need to be harnessed now to succeed in the year ahead.

<sup>1</sup> Barclaycard experience report June 2024

<sup>2</sup> CAA Q1-Q3 2024 vs 2023 <https://www.caa.co.uk/data-and-analysis/uk-aviation-market/airports/uk-airport-data/uk-airport-data-2024/>

<sup>4</sup> ORR <https://dataportal.orr.gov.uk/statistics/usage/passenger-rail-usage/>

# Focused on sustainability

**As the UK's leading supplier of fresh produce to the foodservice industry, we understand our responsibility to set the standard for sustainability within our sector. Our commitment goes beyond making our business as sustainable as possible; we are also dedicated to inspiring the entire industry to follow suit.**

## PEOPLE



We demonstrate our care by giving back, doing good, and transforming lives within our communities.

We're proud to support our parent company, Sysco's global goal of contributing \$500m in positive impact by 2025, including £10m in the UK.

Sustainability is driven by our people, and we're committed to empowering them while fostering a diverse, equitable, and inclusive workplace. Every colleague plays a key role in our mission, bringing unique skills and perspectives to their work cultivating a sense of belonging that allows us to care for one another and connect the world through food and trusted partnerships.

## PRODUCTS



We are dedicated to supplying responsibly by sourcing locally whenever possible from over 100 British suppliers, minimising environmental, social, and ethical impacts, and ensuring respect for human rights.

With a focus on encouraging customers to choose British, we've taken steps to move more key products to the UK. Our Sustainability team is constantly challenging the status quo on packaging, ensuring we use only what is necessary.

## PLANET



We're dedicated to protecting the planet by promoting sustainable agricultural practices and diverting waste from landfills (achieving zero waste to landfill since 2016).

We're actively contributing to shaping the future of foodservice delivery. This includes ongoing trials focused on improving delivery methods, with Fresh Direct joining other Sysco businesses in committing to no new diesel vehicles after 2030.

This is a significant challenge, especially as Fresh Direct operates a fleet of over 250 vehicles.

# Sustainability success stories

## From around our business

### Food donation milestones achieved

In late 2024, Fresh Direct depots reached the 3 million meal donation milestone distributing excess food to charities FareShare & City Harvest UK.

Since 2022, Fresh Direct Dagenham has provided enough surplus food to charity

City Harvest for over one million meals for Londoners facing food poverty. By donating quality food, the Fresh Direct team has been able to nourish people across the capital and divert 611 tonnes of greenhouse gas emissions from potential food waste.



### Product innovation successes

Our Foraged® Shredded Mushroom ‘meat-substitute’ product, alongside Goldcircle – UMI Foods, won two Q awards in 2024, including a Gold Award in the Fresh Produce category and Highly Commended in the Foodservice Product of the Year category. This innovative plant-based alternative to meat is transforming menus.

## Award-winning sustainably sourced fish and seafood

**M&J Fresh Seafood Awarded MSC UK Foodservice Wholesaler of the Year.**

We are proud to have been recognised as the MSC UK Foodservice Wholesaler of the Year for a record ten times in 2024. M&J Fresh Seafood has more than 45 years of experience in specialist fishmongering. We offer the freshest daily catch to discerning chefs, responsibly sourced and expertly filleted. Working with British Skippers, well-managed fisheries and fishermen across the globe, always fishing the right way.



## Bringing fresh ideas to market

In the Autumn we launched a range of fresh our 'Crownless Pineapple' which better utilises shipping space by removing the pineapple tops and cutting down of shipping 'fresh air'. For further information visit our website [Freshdirect.co.uk](http://Freshdirect.co.uk) or contact your account manager.

Since 2024, our twin-pack Avocadoes and Driscoll's berry range are also supplied in plastic-free FSC paper-based packaging.

Our category, procurement, sustainability, marketing and operations teams continue to explore innovative products with enhanced sustainability benefits for our customers.



## Volunteering to support our communities



**Sysco GB, including Fresh Direct colleagues recorded 350 hours of volunteering in November coinciding with Sysco's global Purpose Month.**

Colleagues were given the opportunity to take a full day out of their schedule and instead spend the time volunteering with one of our charity partners, understanding the importance of our food donations and living our company purpose of 'Connecting the world to share food and care for one another'.







# Category overview

<b>Alliums</b>	<b>34</b>	<b>Mushrooms</b>	<b>53</b>
<b>Apples and pears</b>	<b>37</b>	<b>Potatoes</b>	<b>54</b>
<b>Avocados</b>	<b>38</b>	<b>Prepped vegetables</b>	<b>55</b>
<b>Berries</b>	<b>39</b>	<b>Root vegetables</b>	<b>56</b>
<b>Bananas and pineapples</b>	<b>40</b>	<b>Salad overview</b>	<b>58</b>
<b>Brassicas</b>	<b>42</b>	<b>Tomatoes</b>	<b>59</b>
<b>Citrus</b>	<b>44</b>	<b>Peppers</b>	<b>60</b>
<b>Exotic vegetables</b>	<b>46</b>	<b>Aubergines, courgettes and cucumbers</b>	<b>61</b>
<b>Grapes</b>	<b>48</b>	<b>Dairy</b>	<b>62</b>
<b>Herbs</b>	<b>49</b>	<b>Eggs</b>	<b>64</b>
<b>Lettuce and leaf</b>	<b>50</b>	<b>Fresh fish and seafood</b>	<b>65</b>
<b>Melons</b>	<b>52</b>		

# Alliums

## Onions

**In 2023, the latest published data from Defra, there were fewer than 7,500 hectares planted with onions, the lowest for several decades and 1,000 hectares down from the previous year.**

The struggles that growers faced in the first half of the season due to the prolonged rainfall in March and April, were fortunately not replicated in the second half of 2024, yields were up by 13%.

Red onions plantings started in January, are down for 2025. We source from Egypt and planting is currently down 20% year-on-year. Additionally, Fusarium Basal Rot can have a devastating effect on yields, however it is too early to predict the impact it will have this year. There is a major industry-wide research programme aiming to breed resistant varieties.

If we experience lower availability we will extend our import period from Egypt. Because of the prolonged disruption in the market last year, 2025 is likely to have better availability, albeit with some potential challenges on red onions.

## Spring Onions

There are currently three major UK growers for spring onions. One major grower exited the market last year, therefore imports are still very important to this category. The crop is also extremely labour intensive.

The UK season starts in June and continues through to September and the loss of a major grower will put some strain on the market.

We have a 10-year excellent relationship with our grower, which will help us manage the challenges that may be seen in the market.

## Supplier focus

**Fresh Direct has worked with Red Star Growers for more than a decade, providing top quality spring onions from its base in the Vale of Evesham.**

The family-run business was launched in 1988 when neighbouring farmers, George Revill and John Bennett joined forces and launched Red Star Farms. The farm has gone from strength to strength, expanded to encompass other premises, reaching its current 1,500 acres.

The incorporation of other farms enabled the group to form a grower partnership in 1997. From its 900sq metre, fully accredited packhouse and refrigerated distribution area, Red Star Growers offers a bespoke service, helping Fresh Direct to keep a spring (onion) in its step.

Red Star Growers also provide us with some great British baby veg, including baby carrots and baby courgettes.



## Leeks

Leek growers continue to suffer challenges with low returns, which has seen a number of large British growers exit this market and move to other crops.

There are currently only around 7 major growers of leeks in the UK. Some issues are being replicated across Europe, which is likely to see overall market availability depressed.

We have added a new supplier, based in Wales for a trial period. We expect the volatility caused by growers exiting the market to reduce.

Over the summer we will continue to source from Spain, which provides good quality supply outside the British season (September to November).



## Shallots

In recent years, shallot production has faced significant challenges, with many British farmers discontinuing cultivation due to reduced profitability.

Additionally, as European growers increasingly prioritise trade within the EU, the availability of shallots in the UK has become more constrained compared to previous years



# Apples and pears

## Apples

The 2024/5 European season has unfortunately turned out to be one of the worst on record. Supply is forecast to be down more than 10% on the previous year, with production at its lowest level since 2017, when heavy frosts and rain led to low yields.

The 2024 problems are similar to those of 2017, with the early season frosts severely limiting the supply of small-sized fruit, widely used in the foodservice sector. Lower stock levels of stored produce are likely to require an earlier transition to the southern hemisphere, which provides apples for the summer season.

Once the South African season is in full swing, after April or May, we expect the situation to ease and supply to start to return to normal, with growers predicting a good season.

We will also be sourcing apples from Brazil during the summer.

## Pears

The situation with pears is not as difficult as our growers are based further to the west, avoiding the most severe frosts. We source mainly from Holland and Belgium, before moving to South Africa in April.

In Europe the key variety is the conference pear, but as we move to South Africa, the most popular varieties are Packham's Triumph, Forelle and Williams' Bon Chrétien. Just under half of South African pear exports are Packham's Triumph.



### Sustainability spotlight

Our plum and kiwi fruit lines are moving from plastic punnets to cardboard in 2025. Our pre-pack apples and pears continue to be supplied in biodegradable packaging..

# Avocados



**We expect the supply of avocados from Israel to decrease and finish at the start of April, earlier than usual, as we transition between the spring and summer seasons.**

## Spring

Spain and Portugal will continue to supply us into late spring, which will help to ease this 'pinch-point' of supply caused by the transition into summer sourcing. We are expecting larger sized fruit from these origins, which has been the recent trend.

Morocco will continue later into spring, although we anticipate that large volumes of smaller sizes will be consumed on the domestic market due to Ramadan.

## Summer

Looking ahead to the summer sources. The early sourcing, from mid-March onwards, will come through from Peru, Tanzania & Mozambique with volumes increasing until their peak in June, July and August.

While still too early to be definitive, Peru is expected to have a good year, producing a relatively large crop, compared to previous years. Early indications are that the increased volumes will be on larger sizes.

We will start to source from South Africa around mid-April, with early indications that the 2025 crop will be comparable to that of 2024. Product from Tanzania will support volumes during the early part of the summer season.

Brazil has become an increasingly important source with a favourable window of supply. However, one of the main production areas, Sao Paulo, has suffered excessive heat, which has caused a large percentage, reportedly up to 70%, of the fruit to 'drop' from the trees. There is better news from the second region, Minas Gerais, which is showing good volumes.

We are closely monitoring the supply situation for products sourced from Kenya, as transit through the Suez Canal may present challenges depending on regional developments.

# Berries

Following the growing challenges of recent years, where weather and rising costs have dominated the sector, the number of British berry growers has fallen. This has resulted in the proportion of British berries falling by 2.54% against imports, which rose by more than 15%.

According to the British Berry Growers association, the input costs causing the biggest issues for the industry are labour and energy costs.

A great concern is the falling glasshouse production of berries. The weather-related issues have seen growers

trialling hardier varieties. This is a multi-year project, recognising that quality and flavour need to be retained in any new varieties.

We continue to work with the same growers that we have in recent years, who have helped us deliver consistent supply, while maximising

quality, freshness and availability.

We are planning to change the volume of some of our fruit packs, following research which has shown that it improves quality as the fruit has more space to move around. It also brings us more into line with industry standard packaging.

The UK season commences in May, with the main crop starting around June. This is followed by raspberries, and then British blueberries around September. British Blackberries are available in the early Autumn.



# Bananas and pineapples

**There have been some long delays to sea freight over the winter. December and early January experienced severe transport congestion, made worse by storms. The situation has now stabilised, although it remains fragile and we will continue to monitor the situation to minimise any disruption.**

Overall production is good and we are currently exiting the naturally lower winter season.

Our long-term successful partnership with Chiquita, one of the longest-established and most respected exporters of tropical fruits, is invaluable. Their supply chain and product knowledge are exceptional, helping us to stay ahead of all the challenges that can affect this category.

With more product now being grown to programme, this expertise is essential in helping to navigate issues as less fruit is traded and it becomes more difficult to deliver quick solutions.



## Sustainability spotlight: Crownless Pineapple

Our 'Crownless Pineapple' better utilises shipping space by removing the pineapple tops and cutting down of shipping 'fresh air'.





**Despite the issues that we've seen across shipping and inclement weather conditions, overall prices in the market are anticipated to remain relatively stable.**

Chiquita will also supply us with crownless pineapples. These are the same as traditional pineapples with the green leaves (the crown) removed. The crown is typically thrown away by customers, so by removing it for recycling during the production process we are helping to cut down on food-related waste. The removed crowns will either be replanted in the pineapple fields or shredded and used for animal feed.

### **Premium Class Extra fruit**

Our long-standing relationship with Chiquita allows us to offer our customers the premium Class Extra fruit.



**Fewer peel blemishes**

**Less latex scarring**

**Smaller tolerance on grading**



# Brassicas



**With better weather conditions than last year, planting is taking place and providing growers with a positive outlook.**

However, the weather over the coming weeks will be critical in ensuring a good summer season. An extended spell of wet weather conditions, like we experienced in 2024 could create similar challenges to last year, with crop shortages.

We source from Cornwall and Lincolnshire as well as a small supply from Scotland, this blended sourcing strategy is designed to enhance availability.

Brassicas will be affected by the additional labour costs in the UK due to the living wage and National Insurance Contributions increases. This will add significant costs to the cost of production, due to the labour-intensive nature of the product.

Following the weather-related problems that we experienced last year, we have taken steps to mitigate this in 2025 by extending the Spanish season slightly. This will smooth the transition between the seasons.

## Cabbage



**The summer crop is currently being planted so it is too early to make any forecasts, and it will not be harvested until mid-July or early August.**

Until then, produce will be coming from stored product. We will monitor the quality of the crop over the coming weeks. The weather has been much better this year, so we are hopeful that quality will be maintained across the year.

Ideally our cabbage will remain British across the year from our 4 suppliers. The harvest on the continent has been down around 30% year on year, which has meant that some UK crops have been exported. This could cause some problems ahead of the more challenging early summer months

Following last year's weather-related problems, we have put some additional contingency plans in place for red cabbage, adding volume from Spain to our sourcing plans.

## Cauliflower

**We have contracted an extra couple of weeks from our Spanish cauliflower grower to help smooth the transition between the British winter and summer seasons.**

This should help avoid any repetition of the extremely difficult period we had last year and allow us to move at the end of June rather than the beginning, when more product will be more available.

We have recently added an additional Scottish supplier, which will spread the risk across more origins, and as Scottish cauliflower tends to start and end later than the rest of the UK, it will also boost availability at the end of the season

## Broccoli

**We have seen a smooth transition to Spanish supply, with no major problems.**

We expect to return to the UK in June, before the weather in Spain becomes too hot. We are planning to have a short crossover with both origins to ease the transition.

With a growing cycle of between 70 and 100 days, the British crop is not yet planted, and it is therefore too early to comment on the main summer crop.

## CauliShoots®



**We also supply CauliShoots®, a great option for menus with the product being edible from tip to toe!**

Long succulent stems, sweet nutty curds, edible from tip to toe and high in fibre and immune boosting vitamin C. They are grown on farms in the UK from June to October and in Spain from November to June.



## Cavolo Nero

**The declining number of growers of Cavolo Nero over the years continues to put pressure on the market.**

It is a high-risk crop for farmers and, with the limited number that remain, any problems with quality or weather issues can have a disproportionately large impact on the crop.



### Sustainability spotlight: Peloton Product

Lincolnshire-based Peloton Produce was only formed in 2020, our partnership with them has continued to grow and now spans not only the UK, but also Peloton's joint venture in Spain.

We love the quality of the produce that Peloton supplies, as it utilises the great mix of nutrients in the soil to maximise the use of the land by planting two crops a year.

Sustainability and innovation also play an important role at Peloton, with the use of recycled and reused

polythene to cover early crops and automated plant processing.

# Citrus

## Limes

**Availability of limes was affected over the winter caused by shipping and port delays. The situation has improved, however deliveries of products from South and Central America may still be affected.**

We source limes from Brazil year-round, which is the main supplier for the European market. During the spring and summer, we also source from Honduras.

Brazil suffered droughts in October, followed by heavy rainfall. This is forecast to impact product quality until June. Sourcing from an alternative origin will help to mitigate some of the potential issues.

## Lemons

**The Spanish supply moves to South Africa in May, early indications are that this supply is looking challenging, with yields potentially down by up to 30%. This is due to the impact of frost during the growing season.**

Unfortunately, the Spanish season, which was excellent last year and extending well into May, is expected to finish at the end of April. The late season variety, Verna, which is generally available until mid-June has also been affected by poor yields, which are expected to be down by around 30%. We will aim to extend the Spanish season for as long as we can to bridge the gap between seasonal crossover, however, availability over the early part of the season may be affected and the Spanish season is forecast to end before May.



## Oranges

**Demand for oranges for juice concentrate remains high but has plateaued. This is putting pressure on the availability of other oranges. Last year, the southern hemisphere crop was affected by the weather pattern El Niño, which created significant problems for growers. This year, the region is affected by La Niña, which emerged during December.**

However, experts expect this La Niña to have a weaker influence over temperature and precipitation patterns, resulting in a better southern season than last year.

The switch to South African supply begins around March/April time, but we expect to move slightly later in June or July, allowing a smoother transition between the northern and southern hemisphere seasons. This also allows us to maximise the Egyptian season, as this tends to offer

the most cost-effective origin before it ends in June/July time.

We do not expect oranges to be affected in the same way as lemons as they are generally grown in a more western part of South Africa compared with lemons. We have however taken steps to reduce risk by taking some product from Argentina through part of the summer.



# Exotic vegetables



## Asparagus

British asparagus, a seasonal favourite among chefs, will be available in the UK from late April to the end of June.

To ensure consistent supply, we will complement the British crop with asparagus from other key regions, including taking additional crop from Mexico. We also source asparagus from Peru; however, this origin faces certain challenges, particularly related to labour shortages.

## Tenderstem®

Over the past year, more licences have been issued for Tenderstem®, which has opened up more supply into the market. This has allowed us to widen our grower base, receiving supplies from another regions of the UK. This will provide some additional risk mitigation for the coming season.

In addition, outside of the British season which runs from June to around November, we will also source product from additional origins to help ensure smooth supply and to mitigate against the supply challenges we saw in 2024.



## Sugar Snap Peas and Beans

We will move back to the British season at the end of May/beginning of June, continuing with British sourced product until September.

As preparation is a very manual processes, the impact of increasing labour costs will affect production costs for peas and beans. Both products require labour-intensive interventions before packaging, including topping and tailing.

## Ginger

The market is returning to normality following the challenges in 2023, when poor weather and flooding in China saw exports decline.

We are currently seeing fewer product rejections and more robust quality, which we expect to continue.



## Sweet potatoes

**The US harvest is expected to be between 30 and 40% down on yield, due to the challenging weather conditions during the growing season.**

This is likely to create availability issues. These will not be seen immediately, as product will still be available. However, by around May, we will start to see less produce from the USA, which will put significant strain on the global market.

While this is clearly concerning, there are alternative supply options, which we will consider covering the shortfall.

One potential solution is to extend our origins to include Argentina, which has increased plantings because of the shortfall in American production,

and the harvest covers the period when the US product is typically in short supply.

By August, supply will move to Egypt, where we anticipate a more normal harvest, although it is clearly too early to know for sure.



# Grapes

**We expect to source produce from key European origins between June and the end of September/October.**

Last year, harvests in Italy and Greece were affected by poor weather which impacted yields. This has seen growers stop producing eating grape varieties and plant other crops.

**We will maximise Spanish produce, which will be our largest source of grapes over the summer, supplemented with produce sourced from Italy and Greece.**

Grape picking and packing is a manual operation, so will be impacted by changes to the Spanish working week, that is due to be reduced from 40 to 37.5 hours a week by law.

With pre-packed grapes sorted and packed in the UK, the category will also be affected by increases to National Insurance Contributions and changes to the National Living Wage from April 2025.

Our partner for grapes is a vertically integrated specialist, Parallel, which works with growers around the world. As well as the standard grape varieties, it provides us with access to different ranges and new products. Because of its scale, our partner, has ensured availability is maintained and not subject to the shortages we experienced last summer.



## Sustainability spotlight

Our grapes are delivered in fully recyclable 500g packs, providing a more sustainable form of packaging to the larger packs it replaced over a year ago



# Herbs



## Driving Innovation in the Herb Category

We are leading the expansion of British vertically grown produce within our sector, driving innovation in the herb category. This approach not only delivers exceptional quality and extended shelf life but also provides a more sustainable alternative to imported herbs, which are often transported via air freight.

The proportion of herbs we source from vertical farms continues to grow. For example, Jones Food Company now supplies more than a third of our basil from its farm in Gloucestershire. This shift reduces reliance on globally grown crops that require long-distance transportation to the UK.

As the sector continues to mature, we have collaborated with our suppliers to introduce new and innovative products. This spring, we are expanding our range to include Komatsuna and British baby kale.

Our long-term supply partner, JVG Herbs, remains instrumental in ensuring high service levels by sourcing fresh herbs across the UK and Europe. Their expertise perfectly complements our three key vertically grown farming partners.

## Beansprouts & New Product Development

From February 2025, our beansprouts will be produced in a state-of-the-art, purpose-built facility designed to meet our high food safety and quality specifications. British-sourced beansprouts will be available year-round, ensuring consistent supply.

Additionally, we have successfully launched a new washed and ready-to-eat watercress, and we continue to explore opportunities for further new product development. While the infrastructure to support the entire sector is still evolving, we are witnessing significant progress in sustainable and locally grown produce.

# Lettuce and leaf

**Picking, packing and processing of lettuce is a very labour-intensive process, involving large numbers of people.**

**This is already impacting produce from Spain, where there has been a reduction to the working week from 40 to 37.5 hours.**

When the British season commences there will be an even greater impact on the cost of production.



## Unwashed Baby leaf

Our unwashed baby leaves include products like rocket, spinach and chard.

Spinach will come from the UK, which has been our preferred origin for this product for the past few years. It will start in May and run through until the end of October.

The remaining baby leaf will come from Italy, where growing conditions are excellent. This provides a reliable growing environment, which is not available for these products in the UK, ensuring quality and availability are maximised.

We have a fantastic, long-term relationship with our Italian grower, which is helping to mitigate some of the challenges that we are seeing in the market.

We expect to see a season-on-season reduction in cost, which is normal for spring into summer. The transition to the UK should begin from mid-May, depending on the weather.



## Chinese Brassica

Chinese Brassica includes Pak Choi and Bok Choy. Last summer was the first time that we grew this crop in the UK and, following that successful introduction, we will once again be sourcing from British growers.

We use two different varieties, one a Spanish variety, the other Dutch. The Spanish variety was grown in the UK over the summer. There are currently no reported challenges with the crop, although we expect the rise in labour costs to impact the cost of production.



## Prepped leaf

We currently have over 70 lines in our range and therefore source from multiple growers. Around 50% of the production cost of this product is made up of the raw material and 25% labour.

We continue to work with Bryan's Salads, who we have worked with for seven years, and who have helped navigate some challenging market conditions over the past few years. This year, there are currently no reported issues with the crop.

While prepped leaf does have some mechanical processes, it still relies on manual labour, which is impacting the cost of production.

The vast majority of the raw material for the summer will come from the UK and will be supplemented with Italian, Spanish and French raw material where appropriate to ensure that we can maintain quality and availability.



## Celery

Celery will move to the UK around the middle of June. This is grown by our lettuce farmer, with whom we have a long-term relationship. While it is a very robust product, celery production requires significant labour for weeding, to sustain the crop.



**The living wage and increases with National Insurance Contributions will add significant costs to the produce. Over 40% of the cost of a lettuce is directly related to labour.**

Our long-term relationship with our British lettuce supplier, which spans more than seven years, is helping us to mitigate some of the cost increases.

There were significant challenges with availability during the transition to the UK in 2024.

We have taken steps to mitigate this in 2025, which will help ensure that we move smoothly between origins by extending the Spanish season slightly.

**See page 6 for our analysis of the current labour market**

# Melons

**During spring, we are supplied from Costa Rica, Honduras and other Central American countries, after which we source products from Europe.**

Between mid-May and September, we are supplied from Spain. The initial few weeks sees produce grown in greenhouses in the Almeria region, before it moves to Murcia and La Mancha, where it is grown outdoors for the remainder of the summer.

Melons are currently being planted in Spain, so it is too early to make any meaningful forecasts on the crop.

However, following last year's weather-related issues, Almeria growers are reportedly planting additional volume which should aid availability in what is probably the most challenging time of the year, due to the lack of other available origins.

The manual nature of the harvest is, however, likely to be affected by the change in working conditions in Spain, caused by the reduction in the number hours worked per week.

Our most popular line is Watermelon with Honeydew the next best seller. We also have Galia and Cantaloupe in our range.

# Mushrooms

**There have been difficulties with compost over the past year, many of which have been driven by irregular weather patterns which have affected quality.**

**As the weather becomes more unpredictable, we can expect to see further problems with compost, which is generally stored outside making it even more susceptible to extreme changes in weather.**

Recent storms across Europe have shown the importance of being able to source from a variety of origins, with Irish supply disrupted. With additional supply partners in Poland and Holland, we were able to mitigate most of the issues that arise.

The biggest concern facing mushroom growers is the UK's ban on peat, which is currently integral to the mushroom growing process. The use of peat in mushroom production will be banned from 2030 as the process of digging

it up releases carbon. Suppliers are making progress using alternative commercially viable peat-free growing media to overcome this issue, however, this change may impact the industry.

As a manually-intensive sector, where labour makes up around 40% of the cost of the product, mushrooms will be particularly affected by increases to the cost of employment in the UK. There are currently trials around automation, but these are unproven for mushroom picking and will require significant investment.

Also affecting the market is the price and quality of input materials, with the rising cost of straw a particular issue as the poor weather conditions have impacted yield.

## **Spotlight on innovation:**

With the increasing importance of mushrooms as a natural, plant-based centre of plate option, we have launched a range of products over the past year, including Mushroom Scallops and Baby King Oysters. We are particularly proud of the Gold Award and Foodservice Product of the Year Award that our Foraged® Shredded Mushroom Meat won in the Quality Food Awards at the end of 2024.



# Potatoes

**This season we expect shortages of small and salad potatoes, as well as large bakers.**

**The key reason for the shortage of small potatoes is the low carryover stock from last season, which means that there may not be sufficient supply to carry the industry through to the new season in August. Large bakers are also anticipated to be in very short supply, due to the lack of time they had to grow following late planting.**

While importing is a possibility, transportation costs are challenging for this low cost, heavy crop. Unfortunately, we do expect the problems to carry into next year, with a shortage of seed potato available for planting in the early part of this year.

The problems with seed potato are not unique to the UK, with European growers facing similar problems.



# Prepped products



**Demand from customers is still strong for 'good value' prepped products that offer the potential to mitigate costs associated with preparation and skill levels in kitchens.**

We are continuing to review and develop our range of prepped products to ensure that we offer the best product mix for customers.

Costs are generally in line with whole head costs and follow the raw material price.

We have been working diligently on our prepped fruit range, with some exciting new product development, launching premium prepared fruits. We plan to continue developing the prepped fruit range over the coming months.

# Root vegetables

**There have been difficulties with compost over the past year, many of which have been driven by irregular weather patterns which have affected quality.**

**This will apply year-round, including during the short import window, when product is still packed in the UK in a labour-intensive process.**



## Carrots

**Also affecting the input costs for carrots is the price of straw. Once reaching maturity, carrots are stored in the ground under straw, but the past year has seen huge increases in the cost of straw due to the poor harvest last year.**

Land continues to be an issue for carrots, which can only be grown in a field every seven years, which puts strain on the available farmland that can be cultivated for carrots. We are seeing some farmers take advantage of the Sustainable Farming Incentive,

where bird seed is planted to grow wildflowers. This has had a further detrimental impact on the available land for carrot farmers.

We have annual contracts in place across three suppliers, which covers the entire season, including the import period which means that we can manage that difficult period in a controlled manner with our growers. Generally, carrots are from the UK for the vast majority of the year, but we would expect a short import window which can be anywhere from two to six weeks from May.

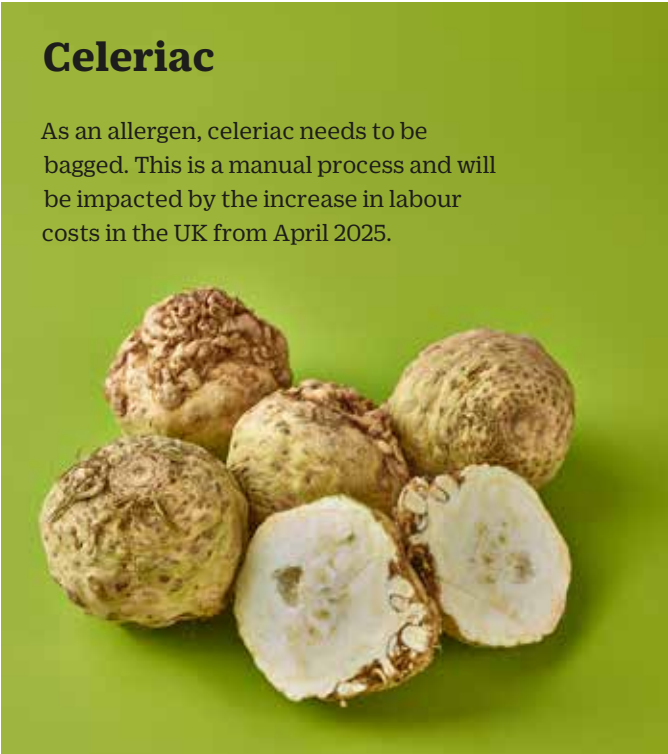
We are seeing greater investment in automation due to the ongoing increases in labour costs. We expect this to continue over the next few years.

The recent weather has made harvesting carrots challenging as these are stored in the ground, under straw, until they are needed. Wet conditions have meant that tractors have struggled to access the fields.



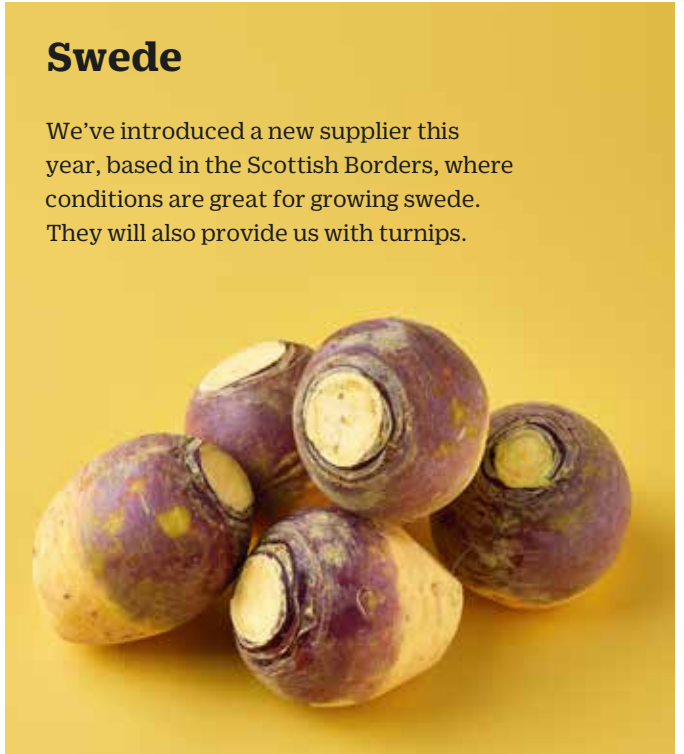
## Celeriac

As an allergen, celeriac needs to be bagged. This is a manual process and will be impacted by the increase in labour costs in the UK from April 2025.



## Swede

We've introduced a new supplier this year, based in the Scottish Borders, where conditions are great for growing swede. They will also provide us with turnips.



## Parsnips

Last year, supply was extremely challenging for around six weeks, which saw market-wide shortages on parsnips. While the weather has been more favourable this year, we have two suppliers in our portfolio in order to help mitigate any potential problems.

We expect an import period of around two to four weeks around May/June time.

Hammonds, one of our key parsnip suppliers, is celebrating its 125th anniversary this year. As one of the country's longest-running parsnip growers, we know we are in safe and experienced hands.



# Salad overview

**Shifting weather patterns continue to disrupt crop cycles, posing challenges to supply and quality. In response, we have taken proactive measures to ensure consistent availability. This includes expanding our grower network, enhancing operational efficiencies, and securing stronger supply agreements to maintain both quality and reliability.**

## Strengthening Grower Partnerships & Maximising Output



**At the forefront of this initiative is our year-round, on-the-ground presence in Spain, led by**

**Rafael Armenteros, whose unwavering commitment to supporting growers and optimising production is delivering exceptional results.**

Building on this success, we are expanding this direct engagement approach to other key sourcing regions, particularly The Netherlands, as we recognise the value of working closely with growers and fostering stronger, more strategic relationships.

Salad crops are highly labour-intensive and are expected to be significantly impacted by rising employment costs in both the UK and Spain. In the UK, increases in the

National Living Wage and National Insurance Contributions will take effect from April 2025. Meanwhile, in Spain, new legislation reducing the standard working week from 40 to 37.5 hours will require careful adaptation by our growers. We are actively working with our partners to navigate these changes effectively and maintain a sustainable, high-quality supply chain.

# Tomatoes

**We have continued to increase the number of growers and origins, providing us with invaluable support to navigate some difficult growing conditions over the winter. We will make a slightly earlier transition to Holland, around the end of April.**

During the summer, we will continue our strategy of working directly with growers, as well as increasing the number of origins we use. This will put us in an excellent position to mitigate risks should the need arise.

Cherry tomatoes will come from Spain this summer as we trial a new direct supplier. Supply will be supplemented with produce from Holland and Morocco. This will help particularly with the September crop, following two months of intensive summer heat. We will also be well placed to deal with the industry-wide problem of the declining number of cherry tomato growers.

We will be entering into a direct relationship with a Dutch tomato supplier for both round and plum tomatoes, based on our successful Spanish model.

This gives us far more control of the supply chain, helping to deliver fresher quality product and maximise availability.

Our highly successful partnership with Isle of Wight Tomatoes will enable us to offer a wide range of premium British tomatoes, starting from April.



## Sustainability spotlight

The IOW Tomatoes range offers a premium selection of sustainably grown, high-quality tomatoes, renowned for their exceptional flavour, freshness, and commitment to environmentally responsible farming. IOW Tomatoes has recently achieved B-Corp Accreditation, recognising its strong commitment to sustainability and responsible business practices.

# Peppers



**Last summer we introduced a new Dutch supplier for peppers. This proved to be extremely successful and we will be building on this success this year and expanding supply.**

We will be working with our suppliers to enhance the specification of peppers following the challenges that have been faced over the past couple of years.

We have widened our supply base to help us improve quality and balance the weight requirement that growers are familiar with and the size requirement that customers want.

The majority of our peppers will come from Holland over the summer, supplemented by deliveries from Spain as a back-up as and when necessary.

# Aubergines, courgettes and cucumbers

## Aubergines

Aubergines will come from Holland over the summer, but as we approach Autumn, and quality begins to decline, we'll add Spain as an origin to maintain quality and availability.

## Cucumbers

Last year saw some challenges on cucumbers as the hotter weather impacted quality and availability. Spain provides the majority of our volume, however this year we are adding Dutch supply to increase availability.

Most of the volume coming from Holland will be unwrapped, saving additional packaging.

## Courgettes

Courgettes will switch to the UK when the season starts in June and July, with Spanish supply providing the bulk of produce at other times.

# Dairy

**The start of the 2024/2025 season for the dairy industry has been difficult with wet weather at the beginning of the year delivering a poor spring flush, when grasses come out of their dormant state as soil temperatures rise. Low farmgate prices are also leading to reduced yields.**

There were record high prices across cream, butter and milk. The second half of the year has shown signs of recovery, with favourable weather allowing cows to stay out in the fields longer, contributing to better returns.

While it has led to some disinflation at the start of 2025, this improvement is against the backdrop of a fragile sector. UK farmers have been affected by low returns and are grappling with changes to inheritance tax rules. With UK farmers continuing to face a lot of challenges linked to overall running and labour costs, a reduction in price will be unpopular.

## Milk

Following a poor performance in the spring flush in 2024, as well as following this, production has improved through the latter part of 2024.

Milk deliveries are up year on year, with the Agriculture and Horticulture development Board (AHDB) predicting that dairy production is likely to grow by 1.1% this season. However most of this increase has been concentrated in the final months of the year, with Q4 up 3.5% in isolation.

However, it should be noted that this is on the back of the lowest milk production in Great Britain since 2016/2017. This is expected to recover slightly as confidence grows and cattle births increase.

**Milk deliveries are up year on year, with the Agriculture and Horticulture development Board (AHDB) predicting that dairy production is likely to grow by 1.1% this season.**



The exception is organic milk, where production is down around 7% year on year, indicating continuing structural issues in organic milk.

The costs of feed, fertiliser and fuel as well as the farmgate price remain relatively stable. AHDB forecasts that the farmgate price may start to decrease during the back half of 2025, as increased production, the spring flush and falling consumer demand combine.

## Cream

**Cream saw all-time high pricing at the end of 2024, as it rose month on month from May until peaking for the last quarter.**

While we saw a reduction into January as Christmas demand falls off, there remains some volatility as there was an increase through to the end of January on wholesale cost. Prices remain 30% up on last January.

We expect to see some further, slower easing of costs during the first and start of the second quarter of 2025.

## Cheese

**Cheese prices were high before Christmas, but have started to reduce since the New Year. Stocks of cheddar cheese remain low, which has meant that prices have been slower to adjust after Christmas than other dairy categories.**

Due to the low stocks and ongoing demand, there has been little benefit for dairy farmers retaining product to produce mature or extra mature cheese, so supply of these more premium products has been restricted.

While we expect some deflation in the coming months, the market remains volatile and the scale of reduction will be dependent on sector confidence and the weather over the important spring period.

## Butter

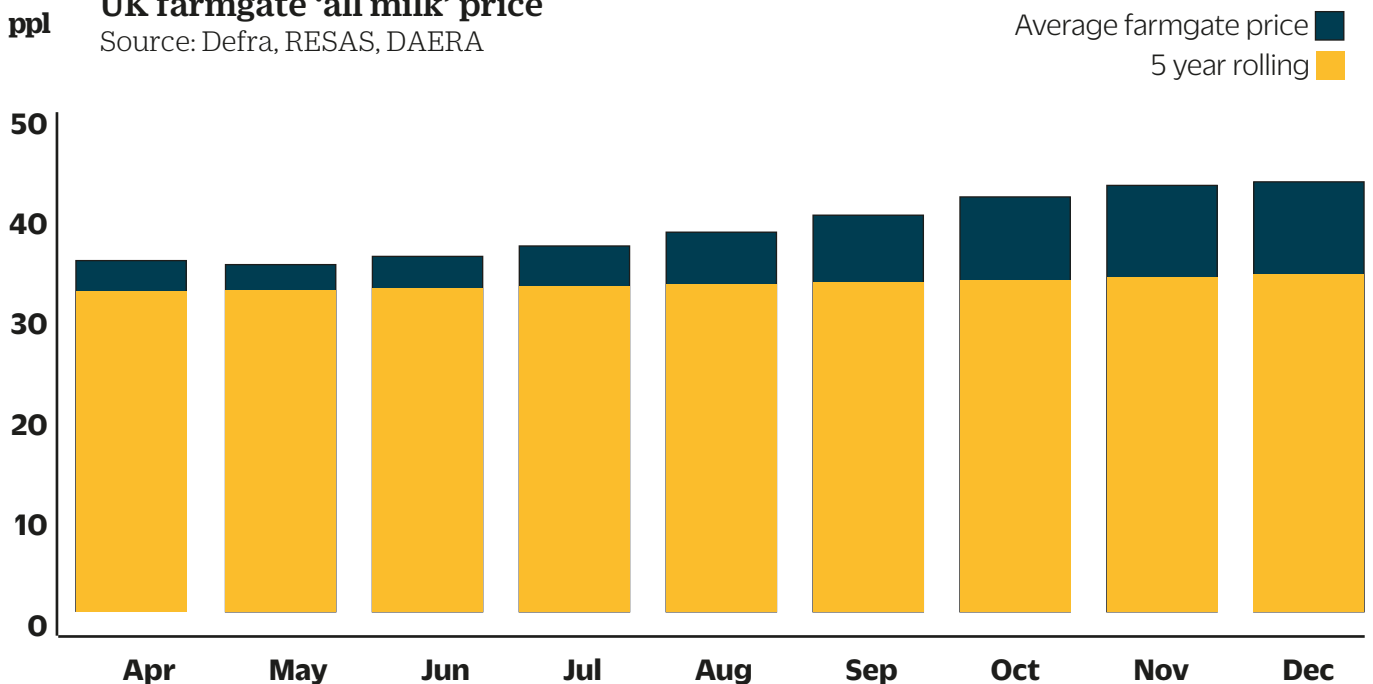
**Butter prices continue to be volatile and were at all-time highs at the end of 2024. While we are starting to see some limited deflation in 2025, this is being hampered by the lack of butter stocks.**

Butter production remains down on previous years which is keeping prices higher than usually expected, and stocks are tight in the UK and EU markets. Prices are up close to 30% year on year.

If the weather improves and there is an increase in production levels, this should help build butter stocks and see the prices fall to more normal levels. However, if the weather does not improve, it is likely that we will see further volatility.

As demand remains consistent, and supply is tight, this could lead to further inflation or to maintenance of higher costs. Mintec is showing the potential for additional inflation into the May/June period in their forecast.

**UK farmgate 'all milk' price**  
Source: Defra, RESAS, DAERA



# Eggs

**After a challenging period, which saw the UK flock fall to its lowest levels in decades due to low farmer confidence, we are continuing to see a recovery in bird numbers and the National flock is now up on last year.**

**While it has not reached the heights of four or five years ago, it is now estimated to be more than 43 million birds.**



**The most serious issue facing the industry currently is Avian Influenza (AI), which, after a couple of quiet years, has again had a significant impact on commercial egg production. This includes the UK's largest outbreak on a Shropshire-based barn farm.**

There are now Avian Influenza Protection Zones across all four home nations. A more positive development

has seen the UK align with Europe, with legislation now in place to allow free range eggs to continue to be marketed as free range in the event of an extended Housing Order. Previously these eggs would need to be relabelled and marketed as barn eggs.

On a global basis AI is causing huge disruption in certain markets, for example, the US lost 20 million egg-laying hens in the last quarter alone.

This is creating some additional pressure on the global market, with the US importing additional eggs to make up for the shortfall in home production.



# Fresh fish and seafood

**M&J Fresh Seafood continues to broaden the fresh range available, providing fresh fish and seafood in sustainable award-winning, chef-friendly, pre-portioned packaging. Offering peace of mind by following stringent processes and quality controls.**

**We know the species, MSC ratings and catch methods. We work with British skippers and well-managed fisheries and fishermen across the globe, always fishing the right way.**



## **Fresh fish and seafood – Sea Bass**



**The past two years have seen the warmest sea temperatures on record and although these temperatures look set to remain in 2025, they are expected to be below the all-time highs seen last year. Rising sea temperatures reduce oxygen levels, and new pathogens which hamper growth and increase mortality.**

The impact of this has been most acute in the Aegean Sea, and the sea bass caught around Turkey which provides fish for the UK market year-round.

While farmers can move their cages further offshore to seek water that has higher oxygen levels, cooler waters and less disease it does leave them at risk from intense storms which have been increasing in the area.

Additionally Turkey is also experiencing extremely high inflation rates which although down year on year are still near a staggering 42%.

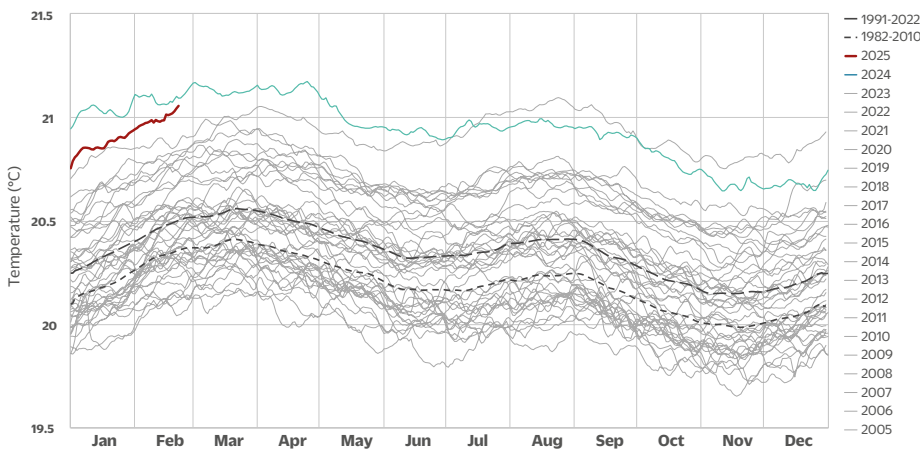
This is having a major impact on input costs, such as labour, and feed, which is traded in dollars.

It takes two years for a sea bass to grow into a marketable size, and to replenish lost stocks. This means although quality remains good, availability may be an issue for some time.

On a positive note, we will shortly see the end of the annual ban on the fishing of wild sea bass between February and March. This has been in place since 2016 and the lifting of it should mean that, from April, we will have better availability.

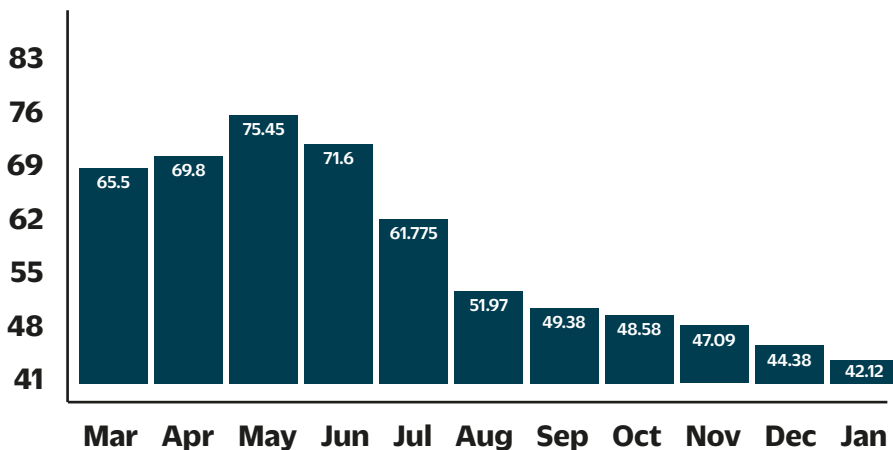
## Daily Sea Surface Temperature, World (60°S–60°N, 0–360°E)

Dataset: NOAA OISST V2.1 | Image Credit: ClimateReanalyzer.org, Climate Change Institute, University of Maine



## Turkey inflation rate %

Source: Turkish Statistical Institute



# Our fishmongers top tips

1

Among the fastest-growing fish lines are off-cuts from standard fish. Whether that's cod collars, tongues or cheeks, chefs are recognising the important part they can play in offering a sustainable, value-for-money alternative. Perfect to refresh your menu.

2

Juvenile monkfish, which is whole-tail skinned on the bone is selling well as an interesting and flavoursome menu option.

3

Thornback Rays have improved their MCS rating in the past year and now could be the perfect time to put them back on the menu.

4

Atlantic Wolf Fish, an abundant, but underutilised fish has an incredible flavour. Significant numbers of this fish are landed at very good value. Caught off the coast of Scotland, this Shetland white fish offers a tasty alternative to some more traditional fish.

5

Large plaice, due to their size, are often underutilised, but there are some great options to cut them into portions to make the most of the whole fish. Brill is a delicious fish and a great value alternative to turbot.



## White Fish

**Cod continues to be affected by quota challenges, which has seen a further 25% quota reduction for the Barents Sea.**

Total allowable catch for Northern Shelf cod has also been reduced by 20%, according to a new UK Government agreement in December 2024. We do not source Scottish cod due to its poor MCS sustainability rating. Icelandic fish has also seen a lesser but still significant reduction in quota. Some customers have successfully moved to haddock in recent years as a result of falling cod availability. This remains a popular alternative. Customers can also use one or two smaller fillets and offer their customers an attractive price compared to larger fillets.

## Hake

A great fish for the summer, abundant and good value. It is best over the summer, but this falls off significantly later in the year, so make the most of it now. It is a good and tasty substitute for halibut.

## Scallops

**We have seen record high prices for Japanese Scallops, large sizes have risen by around 25%, as demand has surged in the United States and there has been increased competition for raw material.**

As a large buyer of scallops, we have a long-standing, positive relationship with our supplier, helping us to navigate many of the availability challenges.

## Lobster

**Canadian lobster prices reached an all-time high in 2024 and have continued to rise into 2025.**

The crossover between the UK and North American seasons takes place when cost of native lobster falls below that of Canadian, which is traditionally around July. However, it is possible that it will take place earlier this year, as Canadian costs are so high. Product is expected to start coming through as early as May. Availability of the native season is likely to be similar to 2024.

## Trout

**We have introduced a new trout supplier, the largest family-owned trout supplier in Scotland.**

We have been very impressed with the quality of the product and our customers are increasingly interested in loch-reared trout as an alternative to salmon. As part of our commitment to maximising quality, we continue to purchase our own trout, which we then send to Severn & Wye smokers to cure and flavour.

## Flatfish

**Flat fish will come out of roe and start to become more abundant and better quality. Plaice, particularly large fish from Scotland offer good value at this time of year.**

Flat fish make a fantastic centre of plate option. Choose from cost-effective options like megrim sole or thornback rays. Early summer generally sees the best prices of the year for lemon sole, which is caught off the south coast of Britain and will be good quality at this time of year.

# What's in season

## Fresh fish and seafood seasonality calendar

■ Good availability     ■ Difficult availability     £ Best price  
■ Varying availability     ■ Not available     Q Good quality

Fish	J	F	M	A	M	J	J	A	S	O	N	D
Amberjack (yellow tail)	■	■	■	■	■	■	■	■	■	■	■	■
Black Bream	■	■	■	■	■	■	■	■	■	■	■	■
Brill	■	■	■	Q	Q	Q	Q	Q	■	■	■	■
Clams - Manila	Q	Q	Q	■	■	■	■	■	Q	Q	Q	Q
Clams - Razors	Q	Q	Q	■	■	■	■	■	Q	Q	Q	Q
Cockles	Q	Q	Q	■	■	■	■	■	Q	Q	Q	Q
Cod	■	■	£	■	£	■	■	■	■	■	■	■
Skrei Cod	■	£	£	■	■	■	■	■	■	■	■	■
Coley	■	■	£	£	£	■	■	■	■	■	■	■
Crab - Brown	■	■	■	■	■	■	■	■	■	Q	■	■
Cuttlefish	■	■	■	■	■	■	■	■	■	■	■	■
Dover Sole	■	■	■	£	£	■	■	■	■	■	■	■
Gilt Head Bream - Farmed	■	■	■	■	■	■	■	■	■	■	■	■
Grey Mullet	■	■	■	■	■	■	■	■	■	■	■	■
Gurnard	■	■	■	■	■	■	■	■	■	■	■	■
Haddock	■	■	£	■	£	■	■	■	■	■	■	■
Hake	■	■	■	■	■	£	£	■	■	■	■	■
Halibut - Farmed	■	■	■	■	■	■	■	■	■	■	■	■
Herring	■	■	■	■	■	■	■	■	■	■	■	■
John Dory	■	■	■	■	■	■	■	■	■	■	■	■
Lemon Sole	■	■	■	£	£	■	■	■	■	■	■	■
Lobster - Canadian	■	■	■	■	£	£	■	■	■	■	■	■
Lobster - Native	■	■	■	■	■	£	£	£	■	■	■	■
Mackerel	■	■	■	■	■	£/Q	£/Q	£/Q	■	■	■	■
Meagre - Farmed	■	■	■	■	■	■	■	■	■	■	■	■

Fish	J	F	M	A	M	J	J	A	S	O	N	D
Megrim	■	■	■	£	£	■	■	■	■	■	■	■
Monkfish	■	■	■	■	■	■	■	■	■	■	■	■
Mussels	Q	Q	Q	■	■	■	■	■	Q	Q	Q	Q
Oysters - Native	■	■	■	■	■	■	■	■	■	■	■	■
Oysters - Rock	■	■	■	■	■	■	■	■	■	■	■	■
Plaice	■	■	■	£	£	£	£	£	£	■	■	■
Pollock	£	£	■	■	■	■	■	■	■	■	■	■
Ray - Thornback, Spotted	■	■	■	■	■	■	■	■	■	■	■	■
Red Mullet - European	■	■	■	■	■	■	■	■	■	■	■	■
Red Mullet - Exotic	■	■	■	■	■	■	■	■	■	■	■	■
Salmon - Farmed	■	■	■	■	■	■	■	■	■	■	■	■
Sardines - Cornish	£	£	■	■	■	■	■	■	£	£	£	£
Scallops - UK Waters (Roeless)	■	■	■	■	■	■	■	■	■	■	■	■
Scallops - Import (Roeless)	■	■	■	■	■	■	■	■	£	■	■	■
Sea Bass - Farmed	■	■	■	■	■	■	■	■	■	■	■	■
Wild Sea Bass	■	■	■	■	■	■	■	■	■	■	■	■
Sea Trout - Loch Sea Reared	■	■	■	■	■	■	■	■	■	■	■	■
Squid - European	■	■	■	■	■	■	■	■	■	■	■	■
Swordfish	■	■	■	■	■	■	■	■	■	■	■	■
Rainbow Trout - Farmed	■	■	■	■	■	■	■	■	■	■	■	■
Tuna	■	■	■	■	■	■	■	■	■	■	■	■
Turbot - Farmed	■	■	■	■	■	■	■	■	■	■	■	■
Turbot - Wild	■	■	■	■	■	■	■	■	■	■	■	■
Whiting	■	■	■	■	■	■	■	■	■	■	■	■
Witch	■	■	■	■	■	■	■	■	■	■	■	■

# Fresh produce seasonality calendar

Brassicas	J	F	M	A	M	J	J	A	S	O	N	D
Broccoli												
Cabbage Savoy												
Cabbage Spring green												
Cabbage White												
Cauliflower												
Cavolo nero												
Kale												
Pak choi												
Purple sprouting broccoli												
Romanesco												
Sprouts												
Tenderstem broccoli												

Alliums	J	F	M	A	M	J	J	A	S	O	N	D
Garlic (and black garlic)												
Leeks												
Onion Red												
Onion White												
Spring onion												
Shallots												

Mushrooms	J	F	M	A	M	J	J	A	S	O	N	D
Button												
Cup												
Flat												
Portobello												
Paris Brown / Chestnut												
Oyster												
King Oyster												
Shiitakes												
Shimeji												
Exotic Mix												
Wild Mix												

Squash	J	F	M	A	M	J	J	A	S	O	N	D
Courgettes												
Pumpkins												
Butternut squash												

Root vegetables	J	F	M	A	M	J	J	A	S	O	N	D
Carrot Standard												
Carrot Chantenay												
Carrot Heritage												
Carrot Chantenay Coloured												
Celeriac												
Parsnip												
Turnip												
Swede												
Beetroot Red												
Beetroot Golden												
Beetroot Candy												
Horseradish												
Salsify												

Exotic vegetables	J	F	M	A	M	J	J	A	S	O	N	D
Asparagus Green												
Asparagus purple												
Asparagus white												
Fennel												
Fine beans												
Ginger												
Globe artichoke												
Jerusalem artichoke												
Lemongrass												
Mangetout												
Mooli												
Okra												
Rhubarb forced												
Rhubarb outdoors												
Round courgette												
Sugar snap peas												
Sweetcorn												

Stone fruit	J	F	M	A	M	J	J	A	S	O	N	D
Avocados												
Cherries												
Nectarines												
Peaches												
Plums												

Apples & pears	J	F	M	A	M	J	J	A	S	O	N	D
Apple Braeburn												
Apple Bramley												
Apple Cox												
Apple Gala												
Apple Golden Delicious												
Apple Granny Smith												
Apple Pink Lady												
Apple Red Delicious												
Apple Royal Gala												
Apple Russets												
Pears Conference												
Pears British												

Berries	J	F	M	A	M	J	J	A	S	O	N	D
Strawberries												
Raspberries												
Blackberries												
Blueberries												
Redcurrants												

Melons	J	F	M	A	M	J	J	A	S	O	N	D
Orange Flesh												
Galia												
Honeydew												
Watermelon												

■ UK availability - good  
■ UK availability - varying

■ Imported  
■ Not available

Grapes	J	F	M	A	M	J	J	A	S	O	N	D
Red												
White												

Exotic fruit	J	F	M	A	M	J	J	A	S	O	N	D
Bananas												
Coconuts												
Dates												
Figs												
Kiwi												
Kumquats												
Mangoes												
Papayas												
Passion Fruit												
Physalis												
Pineapples												
Pitahayas (Dragon Fruit)												
Plantains												
Pomegranates												
Starfruit												

Citrus fruit	J	F	M	A	M	J	J	A	S	O	N	D
Grapefruit												
Lemons												
Limes												
Oranges												
Easy Peeler												

Chillies	J	F	M	A	M	J	J	A	S	O	N	D
Green & Red												
Scotch Bonnet												
Padron												
Jalapeno												

Salad	J	F	M	A	M	J	J	A	S	O	N	D
Beef Tomatoes												
Cherry Tomatoes												
Vine Tomatoes												
Plum Tomatoes												
Round Tomatoes												
Heirloom Tomatoes												
Piccolo Tomatoes												
Cucumber												
Peppers												
Radish												
Aubergine												
Spinach												
Lettuce												

Lettuce/Leaf	J	F	M	A	M	J	J	A	S	O	N	D
Round/Butterhead												
Cos												
Baby kale (vertically farmed)												
Fresh Curry Leaves												
Iceberg												
Komatsuna (vertically farmed)												
Curly Endive/Frise												
Lamb/Mache												
Lollo Biondi												
Lollo Rosso												
Oak Leaf												
Radicchio												
Rocket												
Baby Red Chard												
Chicory/Endive												
Celery												
Chinese Leaf												
Watercress												

Herbs/Cresses/Shoots	J	F	M	A	M	J	J	A	S	O	N	D
Basil												
Chives												
Coriander												
Curley Parsley												
Flat Parsley												
Dill												
Mint												
Rosemary												
Thyme												
Potter Herbs												
Micro Herb												
Edible Herbs												
Samphire												
Bean sprouts												
Growing/Living Cress												

Baby veg	J	F	M	A	M	J	J	A	S	O	N	D
Carrot												
Leek												
Courgette												
Beetroot												
Parsnip												
Corn												

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