



# MARKET NEWS

April 2010

## Overview

Spring is in the air and the clocks have gone forward, roll on the Summer...

The Easter weekend was quite slow in the wholesale markets. High prices were experienced on most basic commodities are not helping things along. Market prices of Iceberg, Tomato, Broccoli, Peppers, Courgette and Onion are 2 to 3 time the normal price. On a brighter note, conditions in Spain and Morocco are improving and the change over of salad from these countries back in to northern Europe is now thankfully underway, with Cucumber, Peppers and Beef Tomato the first to move.

Chile is recovering but a number of aftershocks are not helping them, delaying onion and apple.

All onion prices continue to rise as stocks are depleted in Europe (covered later on in Market News)

### In Season:

Purple Sprouting Broccoli, Jersey Royals, New season Cucumber, Over wintered Cauliflower, Spring Greens (end April, a bit late)

### Vegetables

#### Potatoes

At the moment there are no major issues to report on supply, there are still isolated problems with bruising, due to poor lifting conditions and high dry matter. There are ample supplies of good quality baking potatoes available. Varieties are mainly Estima/Harmony and Melody. Maris Piper with good fry qualities is becoming harder to source, although we have sufficient raw material going forward. Supplies of Imported Salad potatoes are tightening up here in the UK due to a poor rate of exchange €/£. Mediterranean growers are looking to sell into Eastern Europe for better returns. Planting for the 2010 crop is well underway but is running slightly behind last year due to the recent bad weather - a good dry spell is needed to catch up. Jersey Royals are now here and FANTASTIC...

**Carrot & Parsnip.** Carrot supplies are starting to tighten up and good quality carrots are becoming short, Scottish carrots will start end of April. There are concerns however over the new seasons crops due the cold wet spring, both on Europe and the UK. Parsnips remain in good supply.

**Cauliflower** Due to the cold, the over wintered cauliflower is running about 3 weeks behind schedule. Lincolnshire crops commenced around mid March and Yorkshire product is expected around mid April. Slight marking can be seen on the inner leaf due to constant frost. The yields will be down, but no shortages are expected





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**Broccoli** The quality is good but volumes are much lower than forecast. Growing conditions in Spain were poor through March and volumes are now expected to remain low for the next few weeks. UK planting is underway but around 3 weeks late, which may be felt in June. Don't forget Purple Sprouting, it's British and fantastic.

**Cabbage** A similar story to cauliflower for Savoy cabbage, which has suffered due to the winter weather. Expect sizes to be at the lower end of the specification until the new season crop arrives in June. There are no issues currently expected with green cabbage. White and red cabbage is from cold stored and the quality is excellent with no supply problems expected. All crops have now been planted for June/July, but due to the poor weather conditions and water logged fields these crops are running around 2 to 3 weeks late which could effect availability in early June. Did I mention Spring cabbage? (3 weeks away)

## Onion

This is an area of concern as there are two issues effecting supply & price. The first problem is a usual season change of large sweet onion, moving from Spain to Chile, but as Chile is still reeling from the Earthquake the volumes are reduced resulting in forcing up prices. When this change happens, most people trade down onto yellow cooking onions from UK and Holland. This year UK/Dutch onion has increased demand due to the problems discussed, on top of this there have been crop failures in Eastern Europe creating a huge additional demand from Russia and the Baltic's. Forecasters are estimating this demand may exceed current stock available.

## Salads

**Aubergine** There is some improvement, although production will remain low and prices high, sizes and quality will improve over the coming month, helped by Dutch glass house becoming available.

**Capsicums** The supply out of Spain is virtually non existent, Spring crop from Almeria has started but volumes are low, Israeli Red and Yellow are bridging some of the gap and the start of Dutch (mainly green) has commenced, delivering excellent quality.

**Tomatoes.** The shortage for tomatoes is massive and the situation is not likely to change for at least 2 to 3 weeks. Spring crop Spanish will help but will probably land too late. Prices are 3 to 4 times higher than usual in the speculating market. Any type of volumes from Holland and UK are about a month away.

**Courgette** Quality is good but volumes are very low and are expected to remain so for the foreseeable future,.

**Cucumbers** Main Spanish crop has now finished, UK and Dutch are underway with excellent quality. We should be moving onto unwrapped product in May.





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## Leaf

### •Iceberg, Cos and Gems

Last month was incredibly difficult, with Icebergs having to be flown in from the United States due to the lack of product coming out of Spain. The situation in Spain remains very difficult with some isolated breakdown due to prolonged rain, however the weather over the last week has improved and these product respond quickly to improved condition. The quality is just OK.

•**Fancy Leaf** A very similar story to the above, production is incredibly low but should respond to improved conditions, the quality is ok.

**Celery** The quality is holding up well under difficult circumstances in Spain. Prices remain strong, Spring crop now coming through

## Fruit

### Apples

**Golden Delicious** French supply is tightening up but quality is still good. We will aim to run French as long as possible as it eats far better than new season South African.

**Red** Still good quality, French is available but of reduced quantities, some Southern hemisphere Gala is available but very expensive.

**Granny Smith** European stocks are now very low with an isolated problem of Scald (brown marks). Chilean fruit is late due to the Earthquake and South African will not be loading in any volume for another couple of weeks.

### Stone Fruit

**Peach & Nectarine** Peach is not good enough quality (its not eating well). Nectarine is better but the problems out of Chile have made supply difficult. The supply is sporadic.

**Plum** South African fruit is delivering good quality. South American stock is due shortly.

**Melon Honeydew** Costa Rican & Honduran fruit continues, quality is good load will stop in around 4weeks which gives us some time to let the Spanish season bed in.

**Galia & Cantaloupe** Similar to Honeydew, currently short supply, quality is good.

**Watermelons** The quality is good, Costa Rica stops shipping this week, so the prices will rise as we approach the Spanish Almeria seasons.

## Fruit

### Citrus

**Orange** Small orange will move from Spain to Egypt over the next month as there is more plentiful supply, Medium/large sizes from Spain are still delivering good quality going forward.

**Lemon** The quality remains good out of Spain and we do not expect any issues going forward.

**Banana** Excellent quality, with no major issues to report, Costa Rica and Dominican Republic are a little low on volumes but improving and quality is good. The rate of exchange Dollar v Pound is pushing up the price.





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**Easy Peelers** This is not the best time of year for easy peelers, Spanish Hemandina eat well but they are very scruffy, Moroccan Clementine's have a very short life and contain waste, we are moving into new season South American (Peruvian/Argentinean) Satsuma's which are an improvement but not fantastic, they are pale in colour with a green tinge which will improve week on week.

## Soft Fruit

### **Berries**

**Strawberry** Quality is much improved, Dutch (Clery variety) is now available and tasty, lighted Sonata variety is starting to pick up volume which also eats well. Moroccan and Spanish quality is very poor and will be difficult for the rest of the season. The quality coming through from Ethiopia is also good but this is nearing the end. **Raspberries** Production from Spain and Morocco is improving along with quality. There is reduced volume from South America and Mexico. Portugal production is almost zero and will remain so until May. Production from Tanzania will start at the end of April. **Blackberries** Mexican quality is good and is only getting better. Production out of Spain is still very low. **Blueberry** Still on Moroccan fruit where production is getting stronger and has excellent eat quality, but prices are high. Chilean production is lower than normal due to the earthquake, the quality is still good. **Redcurrant** Dutch fruit is of superb quality and good availability, prices are starting to increase. There is some Chilean on the market but quality isn't great.

### **Grapes**

•**White** Chilean Thompson continues well and has an excellent eat quality. Demand is high and exceeding supply due to the Quake. We will be moving out of the Chilean into Indian Thompson in mid to late April.  
•**Red** Once again eat quality of the Chilean Flame and Crimson is superb. Chilean supplies will carry on into May.

### **Exotics**

•**Sugar Snaps & Mange Tout** There is a gap between Egyptian finishing and Kenyan starting, which can usually be bridged by Morocco but due to frost this is not viable. Guatemalan is helping plug the gap but volumes are low. Kenya will start end April. **Beans** Quality is excellent from Kenya and ample supply. **Avocado's** are good, supply of Peruvian Fueta is still plentiful.

Thailand has improved with **Baby Corn** back to normal. **Asparagus Tips** & **Lemon Grass** are good. South African (RSA) **Butternut Squash** from South American is excellent and availability is good. RSA **Baby Vegetables** The expected volumes have not materialised due to heavy rains and flooding, supplementing with French. These problems are expected to improve by end of April.

•**Chillies** Moving from Egypt to Kenya with no problems to report.  
•**Sweet Potatoes** American has ended and moving to Honduran, the quality is good. **Figs, Limes** and **Mango** continue from Brazil and the quality is good. **Garlic** is still very short and expected to remain so. **Ginger** is also short but to a lesser extent.  
•**Shallots** Cold store coming to an end with some deterioration in quality, new season due 4-6 weeks (keep stocks tight).



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