



MARKET NEWS

March 2010

Overview

Seeing as talking about the weather is a British past time, I don't feel too bad for complaining about it again (for the 4th month in a row!) The UK winter of 2009/10 was the coldest for 31 years. Scotland and Northern Ireland experienced the coldest in 48 years, with Europe making similar claims. Needless to say from a growing point of view it's been pretty disastrous, UK Cauliflower, Savoy, Carrots and Swede have all suffered from prolonged frost. In addition, all Salad from Spain and France have seen production/quality down, some crops as low as 50%.

That said, the next 14 days forecast temperatures here and on the continent are forecast, with improved light levels.

The recent sunny days have stimulated the wholesale arena but as production is low, prices have soared on most core lines.

Chilean Earthquake Update

Port of San Antonio has 2 of it's 8 piers working, the central Chilean port Valparaíso resumed some operations last week but incoming aid is clearly a priority. The damage to pack houses and loss of electricity are the main issues. Grape is worst effected with huge losses on the quays, Apple and Onion are also effected which is creating hype and uncertainty in the market place.

In Season:

Late March - Purple Sprouting Broccoli (late due to cold)

End March/April – Over wintered Cauliflower & Jersey Royals

Vegetables

Potatoes There are no major issues to report. However there are concerns about the level of waste as stores are depleted, this may push up farm prices. Supplies of Baking potatoes are ample and are of good quality. High dry matter in the Maris Piper is still causing some bruising. Piper that has a good frying quality is becoming hard to source. Due to the predominantly larger sized potato crop UK Mids/Salads are still in shorter supply, Salads are mainly Charlotte variety which eats well and looks good. Plantings for the 2010/2011 season are underway in Pembrokeshire and Cornwall but in the North and East plantings haven't taken place as yet, due to the recent poor weather conditions.

Carrot & Parsnip. Quality and availability is good but any un-strawed carrot is now un-usable due to frost damage. There are concerns over the late spring/very wet conditions which have put sowings back which will result in the new season UK harvest starting later than usual. Parsnip availability is good.

Cauliflower Supply is currently from Imported and Cornwall (Late Season) until over wintered Lincolnshire/Yorkshire cauliflower is ready (about 3 weeks late), there are some slight markings on the inner leaf is visible due to constant frost.



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Broccoli There is good volume availability and is of very good quality. The Lorca region of Murcia is in full production and therefore we don't expect any issues in the short term following the slight gap we had last month

Cabbage Similar to the Cauliflower, Savoy Cabbage is suffering, expect sizes to be at the lower end of the spec 400g+. New season crop arrives in June. White and Red Cabbage is barn stored stock and is of excellent quality. No supply issues to report.

Planting normally commences in March for the new season crop (June onwards) but is now over 2 weeks late due to frost. Planting is expected to run 2 weeks behind schedule which may delay early June crops.

Salads

Aubergine There is some improvement forecast, although production will remain low and prices high, sizes and quality will improve over the coming month.

Capsicums The supply out of Spain is becoming more and more difficult week on week. There is hardly any volume left and quality is deteriorating rapidly. Only the last planted crops (limited volumes), are still maintaining a reasonably good level of quality and supply. Prices have escalated to double figures for the three main colours. Yellow and Red will see some green flashing to maintain quality.

Tomatoes Supply is becoming incredibly difficult. The shortage is massive and the situation is not likely to change for at least a month. Prices are also making double figures in the speculating market.

There is very limited availability and even less when we refer to good quality. To maintain quality fruit is being shipped under colour to reduce waste although it will be present.

Courgette Supply is now almost non existent. For an indication of how bad it is, today's speculative prices in Spain (if you could find any sort of volume) would be €15.00/box, this is before adding any freight cost, etc and with the poor rate of exchange you would need deep pockets. Quality is fine but we are facing at least two very difficult weeks ahead in terms of supply.

Cucumbers We estimate that most of the winter crops is virtually finished. The quality is poor and no volume to talk of. On a more positive note, we are starting our new spring crops next week with crops looking healthy and reasonably good yield, it is becoming easier as the month progresses.

Leaf Although improvements were forecast for last week, the situation remains unchanged. Iceberg lettuce and little gem are maintaining the same high prices. We hope to see a significant improvement on volume during the next two weeks as conditions improve. Quality has improved since the start of February as it is cleaner (no mud), reduced mildew but outer leaf dehydration is an issue. Weights are at the bottom end of the specification (300g+) as a result of the poor conditions.





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Cos lettuce had been more difficult out of Gems and Iceberg. There is very limited availability and not much left in the fields. We have growing areas we will manage to cover all the requirements but generally it will remain a problem from now and end

Fancy Leaf Speciality leaf is still hard to manage. Limited volumes available and high prices. The quality we have from our current crops within the Aguilas and Pulpi growing areas are looking in reasonably good shape

Celery Week on week celery has become shorter in supply. The Quality is holding up well under difficult circumstances and poor availability. Prices have continue to rise and we can't see any changes for the next few weeks, spring crop is expected in the middle of April.

Fruit

Apples

Golden Delicious French is still freely available and the quality is good.

Red This remains short and will be hard work for the coming month until the Southern Hemisphere starts.

Granny Smith French supply is low especially the smaller sized fruit, we are at least 3 weeks away from Southern hemisphere supply until then the scald (brown skin marking) will continue.

Stone Fruit

Peach & Nectarine Peach is not good enough (its not eating well). Nectarine is better but the problems out of Chile have made supply difficult. Spanish is still 4-6 weeks off.

Plum South African fruit is delivering good quality. South American stock is due over the coming month.

Melon Honeydew Brazilian has finished early. Costa Rican & Honduran fruit is now with us, quality is good.

Galia & Cantaloupe Last of Brazilian fruit is now through, moving over to Costa Rica and Honduras for the next 6-8weeks .

Watermelons Costa Rica now on stream with Honduran fruit to follow which should overlap the Spanish Almeria crop.

Fruit

Citrus

Orange There is more volume available out of Spain and more availability from Morocco and Egypt.

Lemon Quality remains generally good and with a good range of sizes available. Prices have eased back from previous weeks and we do not expect any issues going forward.

Limes Predominantly Brazilian fruit, market prices have doubled over last month but expected fall back slightly over next 4 weeks. Quality good.



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Easy Peelers Moroccan Clementine (Nours and Novas) are ending soon the quality has dipped slightly with odd spoilt fruit, Spanish Hermandina were planned for March but Moroccan is still the better eating fruit. **Banana** Following an over an supplied market, wholesale prices are now rising albeit later then predicted, exporters have cut their programs in response to sales below the cost of production. Quality is good.

•Soft Fruit

•Berries

Strawberry New Dutch glass house can be seen, which is plentiful, tasty and expensive, Ethiopian fruit is also good quality but quite expensive. Fruit from Morocco and Spain is very poor due to wet conditions.

Raspberries Tanzanian production has now finished until the end of April. Supply is going to be tight over the forthcoming month due to – nearly zero production from Portugal & the USA, as well as poor quality and volumes coming from Spain & Morocco due to the bad weather conditions. **Blackberries** Using Mexican fruit which is excellent quality and is getting better!! Spanish fruit will be introduced onto the market in the next 2 weeks. **Blueberry** Still using Moroccan fruit which is of good quality. Chilean production is lower than normal due to the earthquake, the quality is still reasonable though. **Redcurrant** Dutch CA stored is very good quality with no problems to report .

Grapes

•**White** Just moved out of Indian Thompson due to poor eat quality, now using Chilean Thompson where the quality is superb. Due to the earthquake in Chile supply will be very tight over the forthcoming weeks – demand is exceeding supply.

•**Red.** Excellent eating quality of Chilean Flame/Crimson and South African Crimson. Due to the earthquake in Chile supply will be very tight over the forthcoming weeks – demand is exceeding supply.

Exotics

•**Sugar Snaps & Mange Tout** Egyptian supply is expected to move into Kenya at the end April, quality is currently good. **Beans** Kenyan supply is tightening up due to very hot weather creating high levels of out grades. **Avocado's** are good, supply of Peruvian Fueta is plentiful.

• Thailand is short due to high temperatures effecting **Baby Corn** short and **Asparagus Tips**, **Lemon Grass** is ok. South African (RSA) **Butternut Squash** continues well moving into South American over the next 4-6 weeks. RSA **Baby Vegetables**. Volumes are improving and are expected to continue over the coming weeks, there are no quality problems to report.

•**Sweet Potatoes** USA cont quality is good and moving into Honduran shortly. **Figs** are now well underway 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.

