



After a tricky few months, we are now seeing new UK potato crop with strong availability, with this we have seen a slight (overdue) drop in pricing from previous months. In addition, potatoes, carrots, courgettes, cabbages, leeks, onions and parsnips are all coming through for September with prices to reflect this. UK rainbow chard and curly green kale have started very well with excellent quality and yield.

UK broccoli and cauliflower are now in full flow and showing superb quality. With availability no longer proving an issue, prices have improved and we will be able to benefit throughout September.

## Great buys this month

There are no real movements on price of UK salad leaves, however the quality of produce is outstanding. The following UK fresh produce are in excellent quality this season:

Cos	UK bunched radish
Gem Lettuce	Red and black British currants
Iceberg	Victoria plums
Lollo Rosso	Majorie plums
Oakleaf	Yellow, white, flat and blood peaches
Lollo Biondi	Nectarines
Radicchio	Apricots
Curly Endive (Frissee)	

Outside the UK European butternut squash has started, and American sweet potato has finished. Sweet potato from both South Africa and Egypt will be in supply throughout the UK.

## Produce to buy with care

Our UK growers were affected by the recent extreme heat and the quality of berries suffered as a result. Normally this would affect the price, however the recent cooler weather has helped, and prices have steadied and will see us through September. UK sweetcorn is coming through also but with availability short - as the season begins pricing is a little strong.



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## Pork

Pork prices remain relatively unchanged yet still above the same period last year. Supplies increased, with estimated slaughter up by 4% (6,600 head) on the week to total 180,400 head. This is the highest weekly throughput since the end of March.

UK imports of pork continued to track below the previous year in June, although the rate of decline was not as large as we have seen in recent months with a 10% decline.

The UK exported a total of 21,000 tonnes of pork in June - 15% more than in the same month last year. The return to pork export growth suggests that much of the logistical disruption caused by the pandemic was largely resolved by June. This means in the first half of 2020, UK pork exports totalled 124,300 tonnes - 6% more than in the first half of last year.



## Beef

British prime cattle prices once again recorded some strong increase last week, continuing in the same vein as the last few weeks, prime cattle prices are 45p higher than the same period last year and 25p higher than the 5-year average.

Industry reports suggest that cattle supply is well below processor demand, product has been tight over the last few weeks with consumers taking advantage of the eat out to help out government scheme. Estimated slaughter for the week was 31,500 similar to last week and almost 1000 higher than the same week last year.

During June total beef imports declined 4% (1000 tonnes) according to HMRC data. With fewer imports, demand higher and product being tight prices look set to continue to rise.



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### Lamb

Total throughputs at GB auction marts dipped slightly on the week to total 126,098 head. Reports suggest that an ease in trade was experienced around most parts of the country, with marts reporting that well-meated, fully finished lambs were attracting the best returns.

Deadweight prices slipped slightly less than a penny last week but still 74p higher than the same period last year and 65p above the 5-year average.

Lamb exports were up slightly but are 13% lower than the same period last year and with imports still down lamb pricing looks set to remain firm.



### Poultry

There has been very little change on Poultry and the Imported Chicken Market remains relatively unchanged. The UK market is still behind in production and it will take another 4 to 6 weeks before production will be back at the suitable capacity. With hospitality back up and running even with reduced capacity the demand will soon outstrip capacity and will put pressure on the current price.



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The Food and Agriculture Organisation is forecasting a contraction of 4% in world exports in 2020 due to coronavirus, with faltering import demand – the sharpest year-on-year decline in three decades.

Widespread disruption caused by the pandemic has hit trade, although, apart from some initial short-term challenges, dairy markets have been relatively resilient, overall. However, across the globe, the FAO is expecting a widespread economic slowdown. Lower petroleum prices will have a significant impact on oil-rich countries and their ability to afford imported dairy products. Exchange rate risk and general trade disruption remain a concern and the uncertainty are likely to make the whole supply chain more risk adverse.

## Cheddar

One of the key long-term trends that we have seen is how customers have shifted the way they consume dairy. While overall dairy consumption continues to increase, consumption per capita is showing a movement away from liquid milk and towards manufactured products like cheese. Consumption per capita of cheese will reach a natural saturation point at some stage, although there are no signs of that yet. However, with population growth, changes in domestic consumption and further increases in exports, we see a clear rise in the relative value of the solid's element of milk.



Wholesale markets were relatively stable in July, with either steadiness or small movements reported.

## Eggs

The usual difference between wholesale and retail prices has not increased although there has been consumer difficulty in finding organic eggs, and concerns rise over an "organic egg shortage", but this seems to be down to increase in demand.



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