



What's
Thriving?



FoodPoint MARKET REPORT

May 2026

Overview

May is the month the British produce calendar comes alive.

After the longest, most disrupted winter and spring in recent memory, the market is finally moving in the right direction. Asparagus is in full season.

British strawberries are arriving from Herefordshire and Kent. Isle of Wight heritage tomatoes are back. Jersey Royals are at their seasonal best. Cornish new potatoes have started. Purple sprouting broccoli is coming through with outstanding quality. Broad beans, peas, samphire, new season courgettes and British outdoor lettuce are all building volume.

But the picture is not without its problems. The freight market is under serious pressure from rising fuel costs, global port congestion and the ongoing impact of conflict in the Middle East on shipping lanes. Sugar snaps and mangetout are in a critical supply gap. Lemons are genuinely expensive right now. Grapes are difficult. Standard broccoli is still recovering.

Here is everything you need to know for May.



What's
struggling?



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Now the Good Part

PEAK SEASON



British Asparagus

Full Season, Right Now

The British asparagus season runs from St George's Day on the 23rd of April to the Summer Solstice on the 21st of June. Eight weeks. Some years less. This is the prime buying window.

The early season premium has gone. Volumes are building from Norfolk, the Wye Valley and the Vale of Evesham with growing conditions in the UK excellent right now – daytime temperatures reaching 15 to 20 degrees with strong sunshine hours. British asparagus is prized for the speed between harvest and kitchen. Spears cut and delivered within 24 hours have a flavour and tenderness that simply cannot be replicated by anything that has spent days in transit. There is no better month to feature it prominently. Use it as a centrepiece. Price it as the seasonal event it is. It will be gone by midsummer.

HEADLINE OF MAY

This is the headline of May. After months of shortage and inconsistency from Spain and Morocco, British strawberries are here.

The season started early this year with Herefordshire farms producing under polytunnels from late March. Kent growers are now in full production alongside them. The season runs through to late September with June and July the peak months for volume and flavour.

Spanish strawberries are also in very good quality right now with strong and reliable availability as the season builds. Between British and Spanish supply the berry situation has transformed completely from what it was through March and April.

British strawberries are a different product to anything imported.

Picked at proper ripeness, with depth of flavour, fragrance and texture that imported fruit cannot match. Let customers know they are British. It matters to people right now more than usual.



British Strawberries

The Season Has Arrived



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Now the Good Part

BACK IN SEASON



Isle of Wight Heritage Tomatoes

Back in Season

While the imported tomato market is still settling into its Dutch changeover, Isle of Wight heritage tomatoes arrive to fill the gap with something the wider market cannot offer.

Grown in the Arreton Valley, the Isle of Wight receives more hours of sunshine than anywhere else in the UK. The combination of that light, the maritime microclimate and a growing philosophy that prioritises flavour above everything else produces tomatoes with a sweetness, depth and natural richness that imported fruit simply cannot match. Over 40 varieties grown each year, all picked only at full ripeness.

Heritage tomatoes, cherry tomatoes, beef tomatoes, vine tomatoes – the season runs from May through to October.

While Dutch supply is still building and baby plum and round tomato availability remains under pressure from other origins, Isle of Wight tomatoes offer consistency, outstanding quality and a British provenance story that resonates with both chefs and customers. Ask us what is available this week.

Blueberries and Raspberries



Two of the most constrained lines of the past two months are now back in strong shape.

Blueberries are in excellent supply with outstanding quality. Raspberries are also arriving in excellent condition.

After one of the most difficult Moroccan soft fruit seasons in years, this recovery is significant. Both lines are now reliable and worth featuring confidently on menus

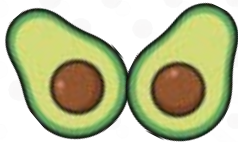
Broad Beans



British broad beans in May. Early season beans are smaller, sweeter and more tender than the larger later season crop. Very young pods eaten raw in salads. Slightly more developed beans

podded and dressed simply with good olive oil, mint and a pinch of salt. A natural three-way plate with asparagus and Jersey Royals that needs nothing more.

Avocados



The double squeeze from port disruption and weather damage that affected March and April has eased. Avocados are now in good quality with consistent availability. A reliable line again after a difficult few months.

Cornish New Potatoes



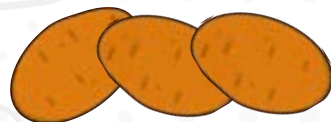
Cornish new potatoes are beginning to arrive alongside Jerseys. A slightly different character – earthier, with their own regional story worth telling. Building in volume through May and worth featuring alongside or as an alternative to Jerseys as the season develops.

Purple Sprouting Broccoli



British purple sprouting broccoli is coming through with fantastic quality right now. This is one of the great underused British vegetables and it is at its seasonal best. Nuttier and more characterful than standard broccoli, with vibrant colour and excellent flavour. A natural pairing with asparagus on May menus and in significantly better supply than standard broccoli at the moment.

Jersey Royal Potatoes



May and June are the months Jersey Royals exist for. The early April premium has completely normalised. At their most available, their most flavoursome and their most accessible price point of the year. Grown exclusively on the island of Jersey, with a flavour that the island's unique microclimate, light soil and seaweed fertiliser tradition produce and nothing else can replicate. Steam simply, dress well, put on the menu.

Peas



British peas arriving in May and building to full season. Sweet, vivid and one of the genuine pleasures of this time of year. Raw in salads when very young, briefly cooked with butter, or worked into a purée as a base for spring dishes. A line to feature while the quality is at its pea

Samphire



British samphire from coastal marshes arriving now. Naturally salty, with a distinctive crunch and a flavour that belongs entirely to this time of year. Underused by most kitchens and genuinely worth putting on the menu while it is here.

British Outdoor Lettuce

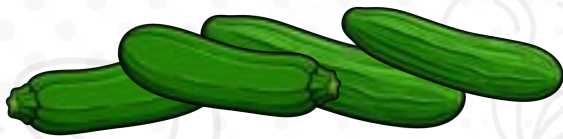


After two of the most difficult months for lettuce supply in recent memory, British outdoor lettuce is arriving. Little gem is coming through first with iceberg and cos following as the UK season establishes through May. Conditions in Spain have also improved significantly over the past week with greater availability coming through from there as well.



British outdoor lettuce does not carry the aphid pressure that made Spanish supply so difficult through winter and spring. It is a clean, reliable product and its arrival effectively resolves the problem that has dominated menu planning since March.

New Season Courgettes and Dutch Cucumbers



UK courgette season beginning in May, ending the Spanish shortage that frustrated kitchens through spring. Dutch cucumbers in full and reliable supply. Both are now solid, confident ordering lines.

Elderflowers



One of the most underused seasonal ingredients of the year. British elderflowers arriving now with a brief window before they finish. Cordials, syrups, infusions, delicate desserts. The flavour is unique to this moment and it will not last long.

Capsicums



Increased availability from Holland alongside good quality product from Morocco. Supply is improving and this is now a more reliable line than it was through April.

Outdoor Rhubarb



Full season and well priced throughout May. Outstanding for crumbles, compotes, jams and chutneys. A reliable workhorse of the late spring and early summer kitchen.



What is still difficult.

Sugar Snaps and Mangetout – Gap Continuing



This remains the most urgent alert going into May.



Egyptian supply of both has finished due to severe heat damage at grower level.



Kenya, which normally steps in at this point in the season, has experienced severe flooding that has pushed the start of its season back by approximately two weeks.

Early Kenyan volumes are beginning to come through but freight options remain limited, meaning a full recovery will take time through May. The two disruptions have overlapped to create a genuine market-wide shortage.



If either of these lines is core to dishes on your menu, plan around this now.

Speak to us before committing to any fixed menu position.

Lemons – Expensive and Short Right Now

This is more acute than last month.

Lemons are currently very expensive and in short supply. The South African season started approximately a month earlier than usual following the difficult end to the Spanish season and supply is naturally tighter at this early stage. Small sizes are particularly limited.



Early season South African fruit is also showing a slight green tinge which is entirely normal and has no effect on eating quality.

This is expected to ease as the season properly establishes but right now lemons are at their most expensive and least available of the spring.

Plan menu pricing accordingly.



What is still difficult.

Grapes – New Problem This Month



Grapes are a new alert for May.
Securing good quality fruit is very challenging right now.



The Egyptian season is expected to begin within the next ten days which will bring some relief, but transit conditions from Egypt need careful monitoring given the current freight climate.



Israeli supply, which typically follows a similar seasonal window, remains uncertain.



The European season does not begin until June.
There is a genuine quality gap in grape supply through the first half of May.

Tenderstem Broccoli – Still the Tightest Line

No meaningful improvement.

Tenderstem broccoli remains one of the most consistently difficult lines on the market with all major growing regions still facing simultaneous disruption. Spain, Portugal, Egypt and Kenya all still affected.



High demand continues to outstrip constrained supply.



Continue to plan around it.



This is not a line to commit fixed menu positions to right now.

Standard Broccoli - Improving But Not There Yet

Spanish volumes are recovering from the planting gap caused by earlier adverse weather but the market is not yet back to normal. Florets are also affected. Improvement is anticipated through the first half of May. Keep a plan B in place through the opening weeks of the month.



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Imported Tomatoes

Still Settling

The transition from Spanish and Moroccan supply to Dutch produce is underway and accelerating but is not yet complete. Baby plum tomatoes remain the most problematic line with substitutions still required. Round tomatoes have been under significant pressure as the Spanish and Moroccan seasons wound down. Dutch supply is building and will resolve most of this through May. Isle of Wight heritage tomatoes are the right choice for quality-led kitchens while the imported market finds its feet.



Cauliflower

Limited

Availability is limited though quality is generally acceptable for the time of year. Not a line to build menus around prominently right now.



Savoy Cabbage

End of Season

Now very limited as is entirely normal for May. Italian and Spanish supplies are covering demand. Red and white cabbage remain stable with no issues.



Cantaloupe Melons

Still in Transition

The crossover between South American supply ending and Spanish cantaloupe beginning is still being managed. Moroccan Charentais melons are available but sizing remains on the small side. Spanish cantaloupe will resolve this as the season builds. Other melon varieties are less affected in the meantime.



Watermelons

Starting But Behind Schedule

First volumes from Almeria in Spain were harvested last week. Harvest is running approximately one week behind the expected schedule and meaningful volumes are not anticipated until mid-May. This is still a positive development given the difficult Spanish winter. Available but in limited supply through early May.



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Pineapples

Price Has Risen

Pineapple pricing has increased significantly over the past twelve months with vessel delays adding further pressure on availability in recent weeks. If pineapple is a regular line, menu pricing should be reviewed to reflect where costs have moved.



Herbs from East Africa

Costs Rising

Herb supply from Rwanda, Kenya, Tanzania and Ethiopia is seeing continued price increases driven by rising airfreight costs and higher fuel prices. This is the second price increase in a matter of weeks with further rises possible. The same pressure applies to legume supply from these origins. Worth reviewing if African herbs are a significant part of your ordering pattern.



Kiwi Fruit

Transition Coming

Italian kiwi is expected to finish through May ahead of Chilean new season supply coming online. Additional stock is being held in controlled storage to support as smooth a changeover as possible but a brief gap cannot be ruled out.



Passion Fruit

Very Tight

Container delays and quality issues have constrained availability. Additional volumes are being air freighted to bridge the gap while the next sea freight containers make their way through. The market remains very tight in the short term.



Mushrooms

Costs Rising

Supply and quality are broadly stable but rising transport and fertiliser costs are creating ongoing pressure on pricing that is likely to feed through over the coming months.



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The Freight and Transport Picture What You Need to Know



The supply chain backdrop for May is more pressured than at any point this year and it is worth understanding why.



Fuel prices are approaching £2 per litre in the UK and similar pressures are being felt across Europe. Farmer and haulier protests are spreading across the continent. A significant protest in Ireland last weekend caused serious disruption with key routes blocked and vehicles left abandoned. Similar action in Britain is being warned as a real possibility as frustration over escalating costs continues to build.



At sea, Middle East tensions are continuing to drive up costs and reduce capacity on key shipping lanes. Emergency fuel surcharges are being applied across multiple freight routes. Major global ports are facing congestion. Reefer unit availability – the refrigerated containers that fresh produce travels in – is creating specific problems, with units frequently poorly positioned and product being held at ports waiting for access to loading.

This is the context behind price movements across several imported categories right now. It is not cause for alarm but it is cause for forward planning. Where you can lock in supply agreements on key lines, do so. Where you have flexibility on origin or variety, use it. And keep talking to us – we are navigating this daily.





Dry Goods – May Update

Olive Oil

No significant new movements for May. The picture from April broadly continues.

The relief is real but it comes with important context.

-  Pricing continues to ease from the crisis years of 2022 and 2023 though the direction is not a straight line. Spanish producers are still defending current levels
-  Italian extra virgin has eased considerably from its peak. Portuguese and Tunisian supply is creating competitive pressure at the lower end of the market.

If you have been reviewing your olive oil purchasing, May remains a reasonable window to act.



Any Mediterranean weather disruption can quickly reverse the improving trend so do not assume it continues indefinitely.

Flour, Pasta, Rice and Pulses

Stable and well priced. The staple dry goods underpinning most menus are in a better cost position than they have been for two years

-  Use this window well and lock in good terms where you can.
-  The second half of 2026 carries more cost pressure risk than the first half as the lag from global trade disruption catches up with kitchen costs.



If You Are Planning May Menus

May is the best month to cook British produce. The argument for building menus around what this country grows has never been more straightforward or more commercially sensible.

- ✓ Asparagus is at full season, best value and peak flavour. Feature it as a centrepiece and do not hide it as a side dish. British strawberries and strong Spanish strawberries mean the berry situation is finally resolved after months of frustration. Isle of Wight heritage tomatoes are the tomato to use right now.
- ✓ Purple sprouting broccoli is in fantastic quality and significantly more reliable than standard broccoli this month. Jersey Royals and Cornish new potatoes are both outstanding. British beetroot in three varieties. Broad beans, peas, samphire and elderflowers all arriving.

British outdoor lettuce is resolving the problem that dominated the past two months

- ✓ Plan around the gaps. Sugar snaps and mangetout are still genuinely short – do not write them into fixed positions without a conversation with us first. Lemons are expensive so adjust menu pricing accordingly. Grapes are difficult until Egyptian supply builds later this month. Tenderstem broccoli and standard broccoli both need plan B thinking through the first half of May.
- ✓ Be aware of the freight picture. Rising fuel costs, port congestion and Middle East disruption are creating upward pressure on pricing for a number of imported lines. Where you can be flexible on origin or variety, use that flexibility. Where you need specific lines, plan and order ahead rather than leaving it to the last minute.



May moves quickly. The broad beans that are tiny and sweet this week are a different product by the end of the month.



The asparagus season that is just reaching its best right now will be over by midsummer. The elderflowers will be gone before most kitchens have had a chance to use them.



Cook what is here.
Cook it simply.
Cook it now.



We are watching all of this daily. Keep talking to us.

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