



MARKET UPDATE OCTOBER 2025

The 2025 Spanish caper season has shown signs of recovery following several challenging years marked by inconsistent weather and high labour costs. Spain remains the UK's key source of quality capers, particularly from Andalusia and Murcia, where favourable climatic conditions this year have supported a better harvest. While pricing remains firm due to structural labour pressures, buyers can expect a more stable market heading into 2026.

Growing & Harvest Conditions

- **Planting (March–April):** Spanish producers entered the season with improved growing conditions compared with last year. Adequate early-spring rains provided good soil moisture levels without excess water, while ample sunshine supported healthy plant development. Timing remained critical, planting too early risks cool, wet soils, while delays reduce flowering potential, but overall, weather patterns were well balanced.
- **Harvest (August–September):** Harvest concluded at the end of September under largely favourable conditions. Quality is reported as good to very good, with consistent size distribution across calibres. Capers must be picked by hand in the early morning before the buds bloom, a labour-intensive process that continues to define cost levels. Producers note that yields are up slightly year-on-year, improving availability for export markets.

Market Dynamics

- **Cost Drivers:** Labour remains the primary cost factor, with wages rising again this year. Even with improved yields, these increases have prevented significant downward movement in prices.
- **Price Trend:** Prices are aligned with 2024, reflecting better volumes, but remain historically elevated compared with pre-2020 levels. Buyers should expect only marginal cost relief if any through the remainder of 2025.
- **Quality & Supply:** Spanish output has stabilised, and with favourable growing conditions, suppliers report good product consistency. The improved harvest has reduced the risk of tight supply for the 2025–26 season.
- **Global Influence:** Morocco and Turkey, the other key origins, have reported average crops. This provides a neutral global backdrop, no major surplus or shortage expected to pressure Spanish pricing in the near term.

The 2025 Spanish caper crop represents a steadying market, with improved quality and reliable volumes. However, continued upward pressure on labour and logistics costs means prices will remain firm rather than fall sharply. Buyers are advised to plan forward procurement early to secure preferred calibres and maintain cost predictability into early 2026.

Product	Pack Size	Net Weight	Calibre / Grade
Capers + Brine	9kg Tub	7.5kg	Nonpareilles
Capers + Vinegar	9kg Tub	7.5kg	Fines
Capers + Brine	9kg Tub	7.5kg	Fines



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