










Food Forensics Risk Newsletter

July 2025



HIGHLIGHTS

-  Extreme heat and shortage of rainfall continue to impact global agriculture.
-  Stone fruit producers feel the impact of the early Spring frosts.
-  Italy and Spain brace for influx of Chinese garlic.
-  Supplies of pistachios from U.S. tighten, heightening risk of adulteration and fraud.
-  Commercial eel fishing on Lough Neagh suspended due to low fat content.
-  India's MPEDA gives assurance that it will comply with new EU antibiotic rules for shrimps.
-  First national case of Lumpy Skin Disease seen in Sardinia, Italy, prompts UK ban of certain bovine imports.

Produce

Citrus

Citrus growers in Italy's Taranto province are facing difficulties due to extreme heat and an ongoing, unresolved water shortage. Temperatures have soared to 40 degrees C, severely stressing trees during a critical fruit-setting phase and causing early fruit drop. Producers report worse conditions than last year, with no recent rainfall and drying tramontana winds preventing normal farm operations. Water supply from regional reservoirs is insufficient and farmers are forced to ration irrigation water with only 4 - 5 hours available every 20 days, intensifying concerns for the citrus sector's survival.

Florida's citrus industry is showing signs of recovery, with the USDA's June 1st forecast projecting 12 million boxes of oranges for the 2024 - 2025 season, up from May's estimate of 11.63 million. Grapefruit and tangerine/tangelo projections remain unchanged at 1.3 million and 400,000 boxes respectively, though the latter represents an 11% drop from last season. The improved forecast reflects ongoing recovery from hurricane damage and citrus greening. While production is still near historic lows, the outlook for Florida citrus is becoming more optimistic.

Top Fruit

The global apple market in mid-2025 shows steady demand but faces regional supply issues and price changes due to weather, consumer trends and trade

shifts. Europe, Italy and Spain report lower stocks and smaller fruit, while Poland's frost damage has caused sharp price rises. Germany sees stable prices with more Southern Hemisphere imports. France's demand has weakened amid hot weather and stone fruit competition. Switzerland holds high organic stocks but mixed conventional prices.

In North America, Washington's supply is steady except for Honeycrisp shortages, with prices generally stable. China's demand grows, especially for gift-box apples, while India has increased imports due to low domestic production, favouring Chilean varieties. Chile and Argentina face rising costs and export challenges, while Brazil's smaller, high-quality crop supports strong local prices. South Africa's exports to Asia remain strong despite limited Fuji supplies. Overall, supply constraints and rising costs are driving prices up globally amid strong demand.

Northern China's fruit production has been severely impacted by unusual spring weather, with repeated cold snaps and strong winds damaging apple and pear orchards during blooming and early fruit stages. These challenges mirror similar conditions in Europe, where fruit growers are also grappling with weather volatility and spring frosts, compounding fears of lower overall supply across major apple and pear-producing regions globally.

Soft Fruit

Berry growers in Tasmania are on alert for the Bronze Leaf Beetle (*Diachus auratus*).

The beetle feeds on leaves, flowers and fruit, causing significant quality loss and reduced yields within weeks. Although present in Australia since 1986, recent outbreaks have heightened the problem, especially in polytunnel systems where warmer conditions favour its growth. Currently, no registered sprays or biological controls exist, making early detection and regular monitoring critical. While primarily affecting berry crops, the beetle threatens other fruits like grapes, avocados, apples and plums.

Blueberry growers in Mississippi are grappling with heavy rainfall that has softened berries and hindered harvesting, despite expectations of a strong crop. Over 11 inches of rain was reported in mid-June, complicating field access and reducing berry quality. While no major disease outbreaks have occurred, wet conditions and equipment maintenance issues remain concerns.

Georgia's blueberry exports to the EU are expected to rise this year due to a fruit shortage in Europe, despite local challenges from spring frost and snow. The overall yield is set to increase slightly, supported by new orchards. Exports to Europe are projected to bring higher average prices than those to Russia.

Stone Fruits

Ongoing conflict between Israel and Iran has raised concerns over potential disruptions in the fresh date trade, particularly affecting iconic varieties such as Barhi and Medjool from Israel, and

Mazafati and Sayer from Iran. The main harvest season starts in August (Israel) and September (Iran), and importers are bracing for shortages if the situation escalates. European importers warn that airspace closures and shipping security risks could severely impact supply chains, especially for air-freighted Israeli dates. Preparations are underway to diversify sourcing, with alternative suppliers in Jordan, Egypt, Pakistan, Saudi Arabia and South Africa being considered.

Egypt's upcoming barhi date season (late August to mid-October) is facing challenges due to unseasonal weather fluctuations having caused yield losses of up to 40% due to poor fruit development, shortening the growing cycle and reduced overall productivity. Unlike the familiar soft or semi-dry dates, barhi is eaten fresh.

The global cherry market faces major disruptions in 2025, particularly for tart cherries, due to severe weather-related crop failures and trade uncertainties. European tart cherry producers have suffered losses of 30% to 80% from spring frosts, reducing global supply and placing greater demand on North American producers. In the U.S., Michigan, the top tart cherry-producing state, is expecting a 20 - 40% drop in yield compared to 2024.

Sweet cherry production is also under strain. Freeze-related losses in Europe and a significantly reduced crop in California, only 25 - 50% of last year's volume, are contributing to supply issues. Washington is an exception, anticipating an above-average sweet cherry harvest, which may ease some market pressure. Tightening supply is expected to drive up cherry prices globally.

Poland's cherry production for the 2025/26 year is forecast to drop sharply by 30% due to the severe spring frosts. This marks a 53% decline compared to the six-year average. The frosts especially impacted early-fruiting varieties, delaying the harvest and worsening already low yields in recent years.

Mango

Unseasonal and extreme weather has severely damaged mango crops in South Gujarat (India) and Sindh (Pakistan), causing 30 - 50% yield losses. Thunderstorms, drought, heatwaves and sudden temperature drops have led to fruit drop, delayed ripening and smaller fruit sizes. Experts link the crisis to climate change and water shortages, warning of long-term risks to mango cultivation.

Bananas

Panama's banana industry is facing a major crisis due to a strike that has halted operations and disrupted the supply chain. The strike, while losing momentum, has still disrupted export routes, causing delays in shipments to key markets in Europe and the U.S.

Exotics

India has exported its first consignment of fresh jamun to London, marking a key milestone as only frozen jamun had previously been shipped. Also called Java plum or Indian blackberry, jamun is a deep purple, tangy fruit valued for its health and medicinal benefits. As such, the jamun fruit commands a high premium price.

Salad Crops

Fresh tomato prices in Australia have surged to record highs due to adverse weather and a tomato brown rugose virus outbreak. Supply disruptions, particularly from northern regions impacted by heavy rains, flooding and cooler temperatures, have reduced availability during the seasonal shift from southern to northern producers. The spread of tomato brown rugose fruit virus in South Australia and Victoria has lowered yields and quality, forcing the closure of some growing sites and triggering biosecurity restrictions.

Mexico's 2025 tomato production is forecast to decline by 3% due to ongoing drought and reduced planting caused by economic uncertainty and anticipated U.S. trade restrictions. A key factor is the U.S. plan to terminate the 2019 Tomato Suspension Agreement and impose a 20.91% anti-dumping duty on Mexican tomato imports starting July 14, 2025. Mexican exporters may look for alternative markets to offset tariff impacts.

Russia's largest greenhouse complex, 'Ovoschevod' has been placed under a one-year quarantine after detecting the pepino mosaic virus (PepMV) in its tomato crops. Under quarantine rules, infected plants cannot be used for seeds or transported without disinfection. 'Ovoschevod' is a major supplier of tomatoes and cucumbers in the region.

Potatoes

Potato growers across the UK and Europe are facing market difficulties as new season harvests ramp up, causing demand for old season stocks to collapse. Prices have plunged from 300 Euro per tonne in February to just 75 Euro per tonne in June. The North-Western European Potato Growers (NEPG) attribute this to a 5%

increase in planted area and intensifying global competition from countries like Canada, China and India.

European farmers are battling rising production costs, climate-related challenges, stricter regulations and worsening pest and disease pressures. In the UK, growers report unsold crops from last year, with some producers still holding 100s to over 1,000 tonnes in storage. Many had gambled on storing potatoes longer in hopes of higher prices, only to face falling quality and weak demand.

Beans and Peas

Kenya's fresh vegetable export volumes fell from 164,000 in 2023 to 74,000 tonnes in 2024. The decline is mainly attributed to concerns over pesticide residues, particularly violations of Maximum Residue Levels (MRLs) reported by the European Union in Kenyan beans and peas. These health-related concerns have led to stricter scrutiny and reduced market access.

Onions

In Switzerland, wet storage conditions and disease, particularly downy mildew, led to high sorting and drying costs and widespread rot, forcing an early reliance on onion imports from the Netherlands, Denmark and France. Repeated weather-related challenges and stricter European pesticide regulations with the reduction in approved crop protection products, especially for onions, has made emergency authorisations necessary in recent seasons to protect yields.

Garlic

The Spanish garlic harvest is progressing with favourable weather giving high-quality early white and purple garlic. However, yields have been slightly reduced due to March rains and restrictions on pesticides. While exports to the U.S. remain strong, driven by quality and aided by high Chinese tariffs, sales to European markets have slowed.

The global garlic market is facing growing uncertainty due to the expected impact of China's significantly increased garlic production. China's 2025 harvest has concluded with strong quality and a 30% rise in output compared to 2024. While this bodes well for supply, it raises concerns of a potential price collapse in international markets. European producers particularly in Italy and Spain who already face strong competition from Egyptian garlic, fear the return of large volumes of competitively priced Chinese garlic could saturate the market and erode prices.

Avocado

The Kenyan Fuerte avocado season is ending earlier than usual due to exceptionally high demand, leaving stocks depleted. Fuerte avocados have become more expensive than Hass for the first time, a shift attributed to disrupted access to European markets caused by the Red Sea crisis, which extended shipping times and made exporters more cautious. As a result, demand surged from Middle Eastern and Turkish markets, which prefer Fuerte, as well as from Kenya's processing industry. Exporters report that Fuerte shipments reached peak volume months ahead of schedule. Despite Fuerte's current high prices, the Hass variety is expected to remain dominant long-term due to its global popularity. Exporters are now focusing on promoting Hass avocados to non-European markets and anticipate a rebound in European demand as Peru's season winds down.

Spices

India's spice industry has called for urgent approval of ethylene oxide (EtO) treatment within the country to meet international food safety standards and protect export quality. The appeal follows spice recalls in Hong Kong and Singapore due to EtO presence in products from MDH and Everest. Industry bodies stressed that EtO is used as a sterilising agent, not a pesticide, to eliminate pathogens such as Salmonella and E. coli.

Nuts

In April 2025, U.S. pistachio exports fell 4% from March, 21% below April 2024, and slightly under the five-year average for the month. Cumulative exports for the 2024/25 marketing year (September - August) show a 24% decline year-on-year, though still 23% ahead of the five-year average. Last year was a record export season for U.S. pistachios, but 2024 is an 'off-year' in the crop's natural yield cycle, limiting supply despite continued strong global demand. With U.S. supply tightening, importers may look to other pistachio-producing countries such as Iran, which remains a major global supplier despite facing trade restrictions in some markets, as well as Turkey, which has ramped up production in recent years. Spain and Syria also contribute to global pistachio trade, albeit on a smaller scale, and could fill some of the gap in supply if U.S. volumes remain constrained.

Iran's pistachio exports surged by 143% in the year to March 2025. Total production exceeded 300,000 metric tons, with

650,000 hectares representing the largest global area of pistachio cultivation. Despite past declines due to drought and sanctions, Iran remains a top producer. The cultivation area in Iran has grown 83% over 11 years.

The 2025 hazelnut harvest is facing a growing gap between overall supply and the availability of high-quality, marketable nuts. Although global harvest volumes are stable, issues such as excessive moisture, poor storage and pest damage are reducing the proportion of premium-grade hazelnuts. While raw material prices in key producing countries like Turkey and Italy remain stable, quality concerns could soon drive up prices for A-grade hazelnuts. Newer growing regions like Azerbaijan and Spain are emerging but are not yet major sources of premium hazelnuts.

Kenya has reaffirmed its commitment to maintaining high export standards by upholding the ban on exporting raw (in-shell) macadamia nuts. The ban, in place since March 2025, is designed to ensure only mature, quality products reach international markets. This announcement follows the circulation of a forged letter claiming the ban had been lifted.

Coconut

The first half of 2025 has been tough for the coconut market with shortages and price rises dominating the market. Copra output continues to decline in India causing a knock-on effect along the coconut supply chain. There is concern that if high prices persist, the risk of adulteration and substitution will increase.

Cereals

Global wheat prices are under pressure as the Northern Hemisphere's harvest approaches, with crops in the US and EU generally in better shape than last year. However, some areas including parts of Europe, China, Turkey, the Black Sea region and Australia, face weather-related risks. FranceAgriMer reported a decline in French soft wheat conditions, though they remain better than last year's poor levels. In contrast, the USDA noted recent improvements in U.S. winter and spring wheat conditions.

Market optimism over crop conditions is contributing to falling prices. UK feed wheat futures for November 2025 have been declining since February in line with global trends. While current market pressure stems from harvest expectations, upcoming weather forecasts remain a key factor to monitor.

Russia has raised its additional grain export quota limit from 45% to 300% of the main allocation in an effort to boost exports before the marketing year ends on July 1. The move follows a poor harvest and a lower overall export quota of 10.6 million tons, down from 29 million tons in 2024. About 2.5 million tons remain unused, as large exporters hesitate due to a strong ruble and low global wheat prices. Authorities aim to meet agricultural export targets despite reduced production, but the strategy may only encourage smaller exporters willing to sell at current prices.

Coffee

Both arabica and robusta prices have declined recently amid forecasts of higher global coffee production. The USDA projects Brazil's 2025/26 output will rise slightly, while Vietnam's robusta production is expected to rebound strongly after drought-related losses. However, current Vietnamese exports remain low, and its 2023/24 crop is the smallest in four years, which continues to support robusta prices. Favourable weather in Brazil, including unusually high rainfall in the key arabica region of Minas Gerais, has eased dryness concerns and further pressured prices. Additionally, rising arabica inventories and bearish production forecasts have weighed on the market, despite a sharp 36% year-on-year drop in Brazil's May green coffee exports.

Looking ahead, global production is expected to increase by 4% in 2024/25, but ending stocks are forecast to fall to a 25-year low. An arabica deficit of 8.5 million bags for 2025/26 is forecast, marking the fifth consecutive year of shortfalls. This suggests that despite short-term price weakness, supply issues could reassert upward pressure on coffee markets.

Cocoa

Favourable weather has boosted optimism among cocoa farmers in West Africa during the mid-crop season, particularly in Ivory Coast and Ghana. A good balance of sunshine and rain has supported strong crop growth, though concerns remain about diseases like black pod due to excess moisture. Port arrivals in Ivory Coast have fallen short of expectations, largely due to poor bean quality rather than low demand. Experts warn that persistent rainfall and quality issues may disrupt supply chains and drive market volatility.

Cocoa trading prices have fallen recently, primarily due to a stronger U.S. dollar

and forecasts of beneficial rainfall in West Africa. Additionally, geopolitical uncertainty, particularly concerns about a prolonged war between Israel and Iran, raised fears of reduced global commodity demand. These factors have added downward pressure to the market, despite ongoing supply concerns.

Inventories in U.S. ports have rebounded sharply from a 21-year low earlier this year, suggesting improved short-term availability. However, demand from cocoa processors and chocolate manufacturers has weakened. Major companies like Hershey and Barry Callebaut have reported lower sales, citing high cocoa prices, rising tariffs and consumer cutbacks. Global cocoa grindings also fell across North America, Europe and Asia in the first quarter of the year.

Tea

The Tea Board of India has issued notices to exporters accused of mislabelling cheap African teas as premium Indian tea, violating rules that require blended teas to be labelled as multi-origin. The move follows a 288% surge in Kenyan tea imports and growing industry concerns about damage to India's tea reputation and falling domestic prices. Stakeholders claim up to 35 million kg of imported tea is being mixed with Indian tea and re-exported fraudulently.

Honey and Syrups

A Lithuanian company has been found to have adulterated large quantities of Ukrainian and Lithuanian honey with Chinese honey containing non-bee sugars. Testing confirmed that 99% of the final product consisted of the adulterated Chinese honey. The State Food and Veterinary Service has enforced 100% authenticity checks on all Chinese honey entering Lithuania, following similar findings of fake honey distributed in Latvia.

Hungary is experiencing its worst acacia honey harvest in 20 - 30 years due to a combination of severe winter bee colony losses, spring frosts and unfavourable weather during the acacia blooming period. The bee population has dropped to about half its usual number. Many remaining bees were used for colony regeneration rather than honey production. Spring frosts severely damaged over half of Hungary's acacia forests, damaging flower and nectar production, leaving about half of beekeepers unable to extract any honey by the end of May. Only western regions yielded some honey, while eastern and southern areas saw near-total failure.

Sugar

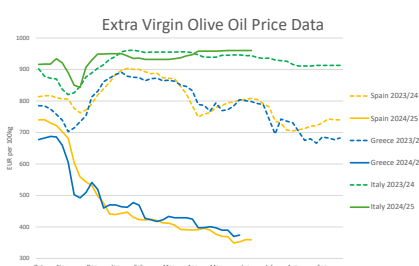
Sugar prices have fallen recently, reaching their lowest level since mid-June 2021, pressured by projections of increased global supply. This decline follows a period of sharp increases due to severe drought and high temperatures affecting sugar beet and sugar cane production. The current drop in prices is attributed to increased sugar cane yields in Brazil, improved weather conditions in Thailand and a favourable production outlook in India. Many Brazilian farmers are also shifting from ethanol to sugar production, further boosting supplies. For the current 2024/25 marketing year ending in September, India's net sugar production is still expected to fall below consumption for the first time in eight years. However, the ongoing rains are expected to benefit the 2025/26 harvest starting in October and support planting for the 2026/27 crop.

Oil Seeds

Forecasts for the EU's 2025/26 rapeseed crop were lowered to 18.6 million tonnes due to persistent dry weather in key producing countries including France, Germany and Poland. Although this is down from April's estimate, it is still nearly 11% higher than the rain-impacted 2024/25 crop. It is warned that the worsening EU outlook could deepen global supply shortages, especially amid drought-related planting issues in Canada and increased canola shipments to China ahead of a pending anti-dumping investigation. These factors have also driven prices higher. The forecast has also been slightly reduced for other oilseeds: EU sunflower seed production is now forecast at 10.4 million tonnes, still up 22% from last year, while soybean output is forecast at 3.0 million tonnes, stable compared to 2024/25.

Olives & Olive Oils

Italian EVOO remains steady at over twice the price of its Spanish and Greek counterparts. Argentina's 2025 olive oil production is expected to be lower than previous years due to adverse weather, including frosts and extreme temperatures. In regions which were hardest hit many growers have diverted olives to the more profitable table olive market.



Protein

African Swine Fever (ASF)

Germany has reported its first case of African Swine Fever (ASF) in wild boar in North Rhine Westphalia (NRW), marking a significant development in the spread of the disease. The strain resembles one which emerged in Calabria in southern Italy and therefore its spread is not thought to be due to migrating wild boar. The infected carcass was found on 13 June 2025. This detection brings ASF closer to pig-dense regions like Belgium and the Netherlands. Authorities have set up a restriction zone and begun containment efforts, including carcass searches and enhanced biosecurity measures. NRW's agriculture minister urged all pig farmers, including hobbyists, to be vigilant. ASF has previously affected wild boar and farms in southern and eastern Germany, but this is its first appearance in NRW, increasing concerns over further spread.

Avian Influenza (HPAI H5N1)

The UK's chief veterinary officer confirmed an outbreak of highly pathogenic avian influenza (H5N1) near Linton-on-Ouse in North Yorkshire on 20 June 2025. In response, DEFRA has established 3km Protection and Wider Surveillance Zones, enforcing strict biosecurity measures.

Blue-tongue virus (BTV-3)

One new positive case of BTV-3 on 31 May 2025 was confirmed in a stillborn calf born inside the restricted zone in North Yorkshire submitted for veterinary investigation post mortem. On 13th June 2025, pre-movement testing exemptions were extended to 30 June for England and 20 June for Wales. From 1 July 2025 the restricted zone for bluetongue will be extended to cover all of England.

Foot and Mouth Disease

An outbreak of FMD was reported in Eswatini, Southern Africa on 16th June 2025. All imports of bovine and farmed/wild ungulates are now restricted from this area. There have been no further outbreaks in Hungary or Slovakia.

Lumpy Skin Disease

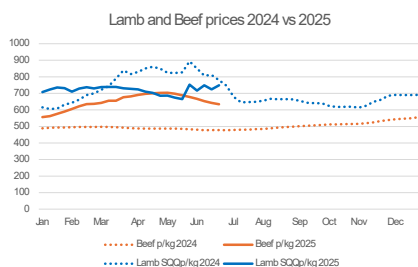
Italy has confirmed its first case of Lumpy Skin Disease (LSD) in Sardinia. The viral disease affects cattle and buffalo, causing skin nodules, fever, reduced milk production and potentially death, but is not transmissible to humans. The UK has suspended the import of various bovine commodities.

Dairy

Despite high milk volumes, June milk prices remained stable, supported by low EU milk volumes and tight butter stocks. Organic milk production has recovered to 2023/24 levels, helped by better weather and rising demand. AHDB raised its milk production forecast for 2025/26 to a record 12.83 billion litres, a 3.1% annual increase, despite cow numbers declining 0.9%. Youngstock numbers continued to fall, raising concerns about future herd replacement. Cream prices fell sharply due to high supply and limited processing capacity. Butter and SMP prices held steady, while cheddar prices fell slightly.

Lamb & Goat

New Zealand sheep prices have risen due to tighter lamb supply following drought and lower lambing rates, with the 2024 spring lamb crop down 7.6% year-on-year. As a result, total lamb production for 2024/25 is forecast to fall by 6.6%, driving NZ deadweight prices to 408p/kg as of early June. In the UK, lamb prices are showing volatility with the transition to new season lamb.

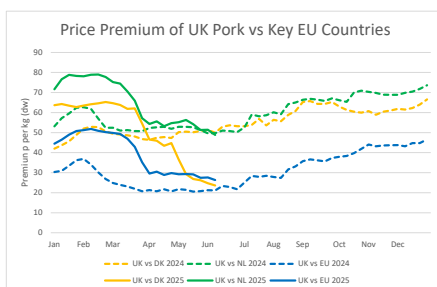


Beef

UK lamb price continues on trend with lamb achieving a price premium on beef. The latest BCMS data from April 2025 shows a continued decline in total GB cattle numbers, with the population down 1.7% year-on-year with the beef breeding herd seeing the largest drop (down 3.4%). Cattle aged 12–30 months for beef production also fell by 3%, indicating tighter beef supply ahead.

Pig Meat

The price differential between the UK and Danish pork price has continued to fall, with it now being less than the EU average. This change is mainly due to an increase in Danish pig prices of 23 p/kg since early May compared to 2 p/kg for the UK. With hot weather forecast for the UK, Pork Steaks and ribs particularly, will be in high demand for BBQ as will trim/lower value cuts for sausages.



Chicken & Turkey

In May, UK broiler chick numbers fell 8% year-on-year to 87.7 million, reversing earlier growth and marking the sharpest drop in two years. Despite this, total chick placings for the year remain up 2.9%. Average slaughter weights rose in April and May, defying expectations linked to lower stocking densities.

Turkey poult numbers fell 14.6% in May and 13.3% for the year so far. Overall, UK poultrymeat production rose 2.5% in the first five months of 2025 to 794,000 tonnes, with chicken making up 95.5% of output.

Egg Layer

In Q1 2025, UK egg production rose 2.7% year-on-year to 255 million dozen, driven by higher non-cage output and a continued shift toward free-range eggs, which made up 70.3% of total production. Barn eggs grew fastest, up 21.4%, while colony egg output fell and now represents just 18.2% of the market. The processing sector shrank by 11% due to a sharp drop in colony eggs available for breaking, with non-cage eggs now making up two-thirds of processed volumes.

Over 50,000 people have signed a petition urging UK supermarkets to stop using imported eggs in pre-prepared British food and to support domestic producers instead. Backed by the British Egg Industry Council, the campaign criticises retailers for "double standards" in egg sourcing.

Salmon

Norwegian health authorities are increasingly concerned about a surge in Infectious Salmon Anaemia (ISA) virus, prompting the Norwegian Food Safety Authority to impose restrictions on fish and personnel movement. The rise in ISA cases has led to large-scale fish culls and job losses at several salmon processing facilities. The family-owned company Egil Kristoffersen AS announced it will shut down its slaughterhouse operations for the rest of the year due to a lack of fish.

Eels

Commercial eel fishing on Lough Neagh, NI, has been suspended until mid-July due to unusually low fat content in the eels making them unsuitable for export. The temporary halt began just one week into the season. The Lough Neagh eel fishery, the largest wild eel fishery in Europe, primarily exports to the Netherlands, where high-fat eels are prized for smoking. The lean quality of this year's catch prompted buyers to reject the product. Even if fishing resumes in July, the season ends on 31 August, leaving little time to recover losses.

Shrimp

India's Marine Products Export Development Authority (MPEDA) has given its assurance that it complies with EU regulations regarding banned antibiotics and medicinal products in shrimp exports. Non-EU countries have until 3 September 2026 to provide evidence and gain EU listing. Vigilance will be needed to ensure products from non-compliant countries are not routed through other countries to access the EU/UK with fraudulent documentation. Profiling products of approved origin (SIRA) could be used to deter fraud.

Fishmeal

Stable global fishmeal and fish oil production is forecast for 2025, supported by steady progress in Peru's anchovy season, which supplies 20% of the world's output. Around 70% of Peru's 3-million-tonne quota has been met. Production is up 3% for fishmeal and 14% for fish oil year-on-year (Jan–Apr), except in North Europe, which saw declines. In China, local production dropped due to seasonal fishing bans, but aquafeed output is growing due to increased aquaculture and use of imports and by-products.

Animal Food

Pet-food

Mars announced it has become the first pet food company globally to commit to full seafood supply chain traceability by joining the Global Dialogue on Seafood Traceability (GDST) and partnering with tech provider Wholechain. GDST leaders expect Mars' adoption to drive wider industry use of traceability standards.

The USDA is proposing to rescind its recently finalised Organic Standards for Pet Food, a move strongly opposed by the Pet Sustainability Coalition (PSC) and other industry stakeholders. These standards,

introduced in December 2024, aimed to standardise organic certification for pet food, support market growth and permit key ingredients like synthetic taurine.

Premiere recall 'Meat menu' adult rind cat food due to plastic foreign bodies.

General

Sustainability

The North Sea saithe fishery will lose its Marine Stewardship Council (MSC) certification on 30 June 2025 due to declining stock productivity. This suspension is the latest in a series of MSC certification losses in Northern Europe: most recently, North East Atlantic mackerel, the North Sea cod fishery in 2019, and several Northeast Atlantic pelagic fisheries, such as Atlanto-Scandian herring and blue whiting in 2020.

Climate

The UN Food and Agriculture Organisation (FAO) has warned that key crops such as wheat, coffee, beans, cassava and plantain could lose up to half of their optimally suitable growing land by 2100 due to climate change. This warning is based on new data from the FAO's updated ABC-Map geospatial app. The data shows these crops are already experiencing declining suitability, with significant losses expected particularly in North America and Europe. Coffee production could drop sharply, while maize and rice may temporarily gain suitable areas, though those gains could reverse under high-emission scenarios. The app enables users to assess climate risks for 30 major crops under different emission trajectories and will soon include additional tools for evaluating livestock heat stress and crop water requirements.

Greenwashing

On 20th June, the European Commission confirmed that it plans to withdraw its Green Claims Directive, a key proposal aimed at curbing greenwashing, citing concerns over excessive complexity and costs for business.

FAO Review of Global Marine Fisheries

The Food and Agriculture Organisation (FAO) has released a detailed review of global marine fisheries, analysing 2,570 individual fishery stocks. The analysis reveals that while 64.5% of fish stocks are being exploited sustainably, 35.5% are overfished. However, when considering catch volume, 77.2% of landings come from sustainable sources. The report highlights a significant disparity between

well-managed and poorly managed marine areas. Regions like the Northeast and Southwest Pacific, where strong management is in place, show notably higher sustainability rates.

Conservation

The EU has launched Ocean Pact, a strategy aimed at protecting marine ecosystems while promoting a sustainable blue economy. Unveiled on 5 June at the UN Ocean Conference, the pact outlines six key priorities, including ocean health, sustainable fisheries, support for coastal communities, maritime security, innovation and stronger global ocean governance.

EU Deforestation Regulation (EUDR)

Fairtrade International has received EU funding to help small and medium-sized businesses comply with EU Deforestation Regulation (EUDR), which bans products linked to deforestation from being sold in the EU. The three-year project, starting in June 2025, will provide training, tools and guidance to simplify compliance.

Human Trafficking

A human trafficking trial has opened in Reims, France, centred on the exploitation of over 50 undocumented seasonal grape-pickers, mostly from West Africa, working in the Champagne region. The workers were recruited through a WhatsApp group promising well-paid jobs but they ended up living in cramped, unsanitary conditions, working long hours for little pay without contracts. The case highlights ongoing concerns about worker exploitation in the 6 billion Euro Champagne industry, which relies heavily on seasonal labour.

Modern Slavery

An investigation has uncovered cases of modern slavery on Brazilian coffee farms supplying Nestle. Workers at the farm reported debt bondage, inhumane living conditions, starvation wages and threats of violence. The coffee harvested there was sold to Cooabriel, a cooperative that supplies Nestle's Nescafe Plan and was certified under the 4C sustainability standard. UK importers, retailers and regulators may face rising pressure to scrutinise certifications such as 4C and push for stronger due diligence under the UK's Modern Slavery Act to avoid complicity in labour exploitation.

Tariffs

Genetically modified (GM) agricultural products, particularly corn and soybeans,

have emerged as a key sticking point for India-U.S. trade agreements. The U.S. is pushing for greater market access for its high-yield GM crops, while India remains cautious due to concerns over domestic agricultural livelihoods, biosafety and the risk of GM contamination in local food chains. Indian officials note the regulatory and enforcement challenges of keeping GM imports, especially corn for ethanol and soybean oil, isolated from domestic consumption.

USA

Kraft Heinz will eliminate all artificial food dyes (colourings) from its products over the next two years, following a push by the U.S. Health Secretary and FDA policy changes. This move is part of a broader effort to phase out synthetic dyes in the U.S. The proposed "Do or Dye Act" of 2025 would solidify these changes into law, banning two dyes, Citrus Red No. 2 and Orange B, by the end of 2025, and phasing out six others, including Red No. 40 and Yellow No. 5, by the end of 2026. Although the UK and Europe have strict food additive regulations, there is a risk that American imports produced before the bans take effect, or items not subject to the stricter standards, could enter the UK market via international supply chains. Close monitoring of imports and labelling standards will be crucial to prevent non-compliant products from slipping through.

Animal Welfare

DEFRA has announced plans to issue new guidance for England on the landing and handling of live crustaceans, with similar rules expected for the rest of the UK. This move aims to align crustacean welfare practices with the 2015 Welfare of Animals at the Time of Killing (WATOK) regulations. If the guidance mirrors WATOK precisely, practices like boiling, freezing or dismembering lobsters and crabs while they are still conscious would become illegal, significantly altering some current industry methods.

New Jersey lawmakers are considering a bill to preemptively ban octopus farming, joining California and Washington in prohibiting the practice due to animal welfare concerns. Advocates argue that octopuses' high intelligence and solitary nature make farming inhumane, citing stress, aggression and cruel slaughter methods in confined farming conditions. Though no octopus farms currently exist in the U.S. The New Jersey bill, S3914, would prohibit both octopus aquaculture and the sale of farm-raised octopus.

IN THE NEWS: June

Seafood

A federal lawsuit filed by the South Carolina Shrimpers Association accuses 40 Charleston-area restaurants of falsely advertising imported shrimp as local. The legal action, believed to be the first of its kind applying state fraud laws to seafood sales on this scale follows undercover testing which revealed that over 90% of sampled establishments mislabelled foreign shrimp as "Carolina Caught", violating state and federal laws. The suit seeks damages and aims to set a legal precedent to deter seafood fraud.

Insect protein

The Insect Bioconversion Association (INBIA) has publicly criticised a UK-commissioned study on the sustainability of insect protein, warning that flawed methods and outdated assumptions could misguide UK policy. The study found that insect meal, specifically Black Soldier Fly larvae, was not consistently more sustainable than conventional protein sources like soybean or fish meal, depending on production conditions. INBIA challenged the study's validity and raised concerns about the lack of consultation with UK insect producers during the research. INBIA has called on DEFRA to revise the assessment with industry input to better reflect real-world sustainability potential.

Fruit

Operation "Hot Lemon" uncovered a citrus fraud in Murcia, Spain, involving three businessmen accused of mixing conventional lemons with organic ones and selling the lemons at organic prices, inflating profits by over 400%. The scheme involved forged documents and illicit transfers of fruit to disguise the fraud. One buyer suffered major losses after 430 tons of juice had to be pulled from export because it no longer qualified as organic. The suspects now face criminal charges including fraud, forgery and consumer protection violations.

Cocoa

A consignment of cocoa adulterants including dried cocoa placenta has been destroyed by authorities in Nigeria. The

adulterants were seized from cocoa merchants where they were destined to be mixed with cocoa beans to fraudulently increase the weight of the batches.

Ingredients

An illegal ginger-garlic paste manufacturing unit using banned additives including titanium dioxide was uncovered in Hyderabad, India.

Wines and spirits

UK supermarkets may experience wine shortages this summer due to strike action by Unite union members at Encirc's bottling and packaging facility in Avonmouth. The strike over pay, planned between 19 June and 5 July 2025, targets high-impact shifts and includes a 12-week overtime ban which threatens to disrupt the wider supply chain.

Cadmium

Cadmium, a toxic heavy metal known for its carcinogenic properties, has been found in various staple foods in France, including cereals, bread, pasta and root vegetables. This contamination is primarily attributed to phosphate fertilisers used in agriculture which contain high levels of cadmium. Once these fertilisers are applied to the soil, cadmium accumulates in the root systems of plants, eventually entering the food supply chain. Despite efforts by European policymakers to limit cadmium levels in food, contamination remains a concern. Health professionals in France are advocating for stricter regulations on cadmium levels in fertilisers and increased public education on the health risks associated with cadmium contamination.

Biosecurity

Two Chinese scientists have been charged by U.S. authorities for smuggling a dangerous fungus, *Fusarium graminearum*, into the U.S., allegedly with plans to research it at the University of Michigan. The charges include conspiracy, smuggling, false statements

and visa fraud. The fungus causes head blight (FHB) in crops like wheat and rice, leading to billions in agricultural losses and serious health effects in humans and livestock. The FBI have labelled it a potential agroterrorism weapon.

The invasive ghost snail (*Bulimulus sporadicus*) has been detected at the Port of Brisbane, posing a biosecurity risk to Australian agriculture. The pest is known to damage crops like citrus, soybeans and cotton. Authorities are using manual collection and baited traps, with year-long monitoring required due to the snail's ability to survive dormancy and spread quickly. Originally from the Caribbean, the snail is already a problem in the U.S., and its presence in Australia has raised concerns over biosecurity funding and preparedness.

Cybersecurity

United Natural Foods Inc. (UNFI), one of America's largest wholesale food distributors, warned of operational disruptions following a cyberattack discovered on June 5 2025. The attack has impacted the company's ability to fulfil customer orders and is expected to continue affecting operations. The breach highlights growing cybersecurity vulnerabilities in the food distribution sector, especially given the risks associated with perishable goods.

Pollutants

Thai government agencies have revealed dangerously high levels of toxic pollutants, including arsenic and lead, in rivers across northern Thailand. The pollution is believed to originate from upstream mining operations in Myanmar. These findings underscore growing public health concerns and the broader cross-border environmental impact of industrial activities on the contamination of food supplies via both soil and water sources.

Is Your Pistachio Product Authentic? NGS Testing Can Tell You

As global demand for pistachios continues to rise, so does the risk of food fraud and adulteration—especially in processed forms like chopped or creamed pistachio, where visual identification becomes nearly impossible. Next Generation Sequencing (NGS) offers a powerful, cost-effective solution. Unlike targeted tests, NGS doesn't require prior knowledge of potential adulterants. It detects all DNA present in a sample, confirming not only the presence of pistachio but also identifying any other species that may have been added—intentionally or otherwise. If you're sourcing pistachio-based products, especially in processed forms, NGS testing is a smart way to protect your supply chain and brand integrity.

For more information, contact barry.hilton@foodforensics.co.uk or info@foodforensics.co.uk

Food Safety June

Country No of Alerts

France	99
United States	40
India	38
Germany	34
Turkey	31
Italy	31
Netherlands	26
Belgium	25
Canada	22
Poland	22
United Kingdom	20
China	18
Denmark	13
Spain	12
Ireland	9
Switzerland	7
Brazil	7
Czechia	6
Egypt	6
Argentina	6
Pakistan	5
Peru	5
Greece	5
Hungary	5
Ecuador	4
Norway	4
Sri Lanka	4
Romania	4
Sudan	4
New Zealand	4
Luxembourg	4
Lebanon	3
Uganda	3
Philippines	3
Ukraine	3
Tunisia	3
Indonesia	3
Australia	3
Hong Kong	3
Ghana	2
Vietnam	2
Iran	2
Serbia	2
Albania	2
Israel	2
Thailand	2
Jersey	2
Iceland	2
Jordan	2
Austria	2
Nicaragua	2
Kazakhstan	2
Latvia	2
Sweden	2
Uzbekistan	2
Lithuania	1
Malaysia	1
Azerbaijan	1
South Korea	1
Morocco	1
Paraguay	1
Kenya	1
Côte d'Ivoire	1
Taiwan	1
United Arab Emirates	1
Slovakia	1
Bulgaria	1
Chile	1
Estonia	1
Finland	1
Syria	1
Bolivia	1
Belarus	1
Georgia	1
Bangladesh	1
Singapore	1
Portugal	1
Nigeria	1
Panama	1
Guatemala	1
Slovenia	1

Total 603

SUMMARY

There were **529 Red**, **62 Amber** and **12 Green** totalling **603 safety alerts and product recalls*** in June.

The majority of alerts were for bacterial pathogens and pesticides (28.9% and 13.4% respectively). Allergens were third with 12.9%.

170 Bacterial pathogen alerts (51% Salmonella, 35% Listeria); E.coli accounted for 6% of which 45% were STEC.

81 Pesticide alerts (31% Chlorpyrifos, 4% Formetanate, Chlorate, Flonicamid, Clothianidin and Dimethoate)

Top 3 alerts by commodity

- 1. Ingredients:** Nuts & seeds; herbs, spices & rice; pasta & noodles.
- 2. Produce:** Fruit; vegetables; dried fruit
- 3. Protein:** Chicken; sausage; pork.

Top 3 number of alerts by county of origin

- 1. France:** Cheese; pork; fish.
- 2. USA:** Nuts & seeds; sweets & desserts; supplements.
- 3. India:** Herbs and spices; nuts & seeds; rice.

*Safety alerts & product recalls compiled from RASFF, FDA, AFSCA, CFIA, Rappel Consommateur, potraviny na pranyr, SFA, CFS, MPI, FSAI & Food Standards AU

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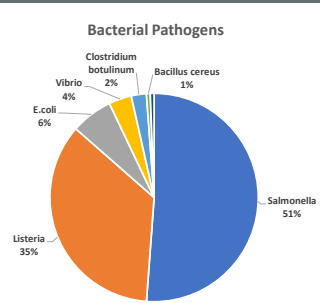
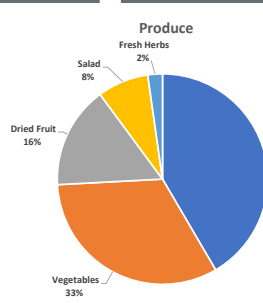
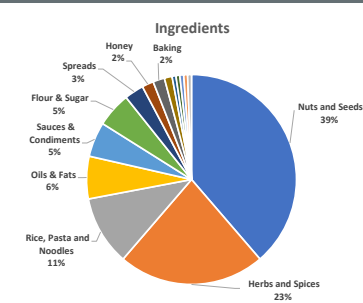
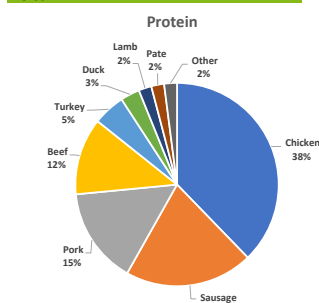
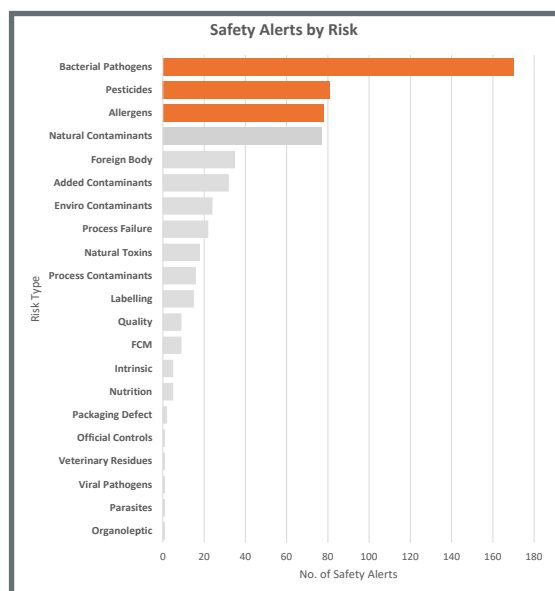
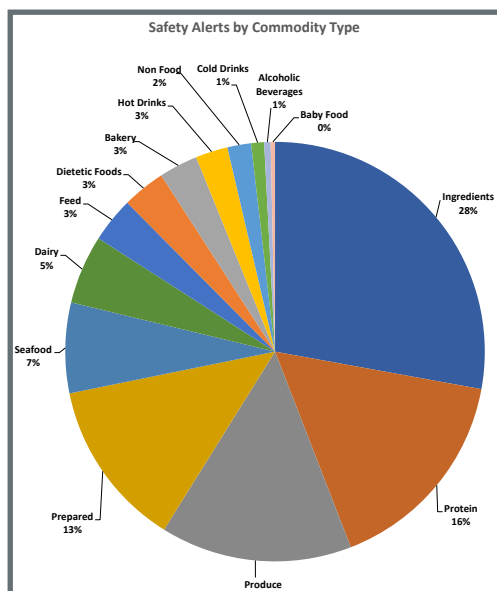
Contact us

For more information about Knowledge Base, Testing & other services.

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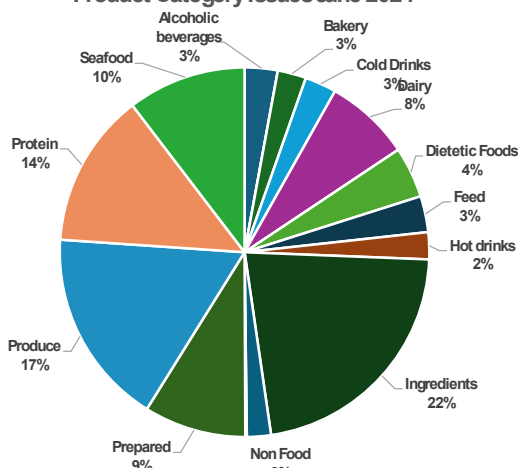
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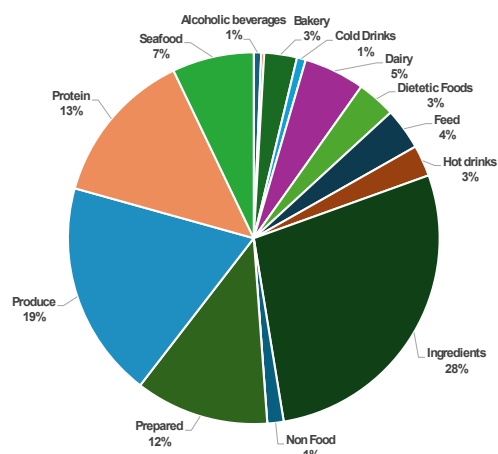


Knowledge Base Trends

Product Category Issues June 2024

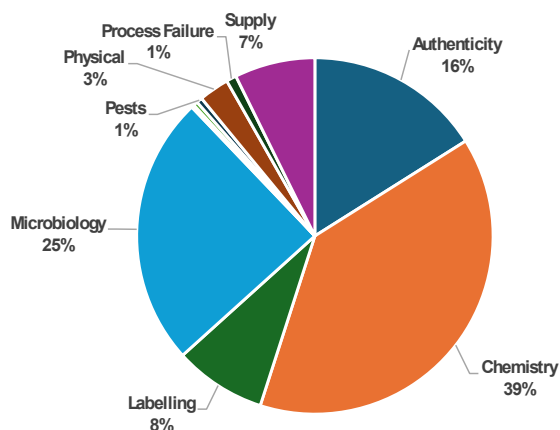


Product Category Issues June 2025

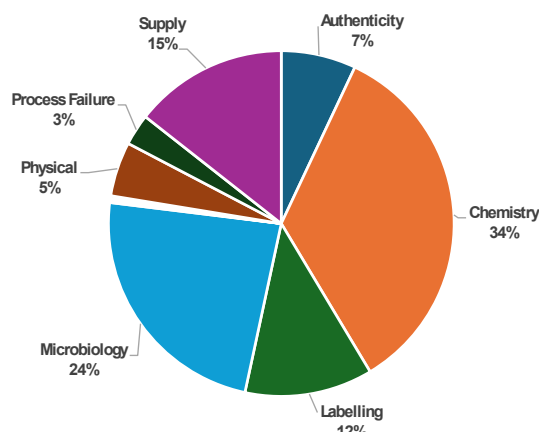


June 2025 has resulted in a similar product category profile to 2024 with an increase in the proportion of issues reported in ingredients, prepared and produce. .

Category Reported Issues June 2024

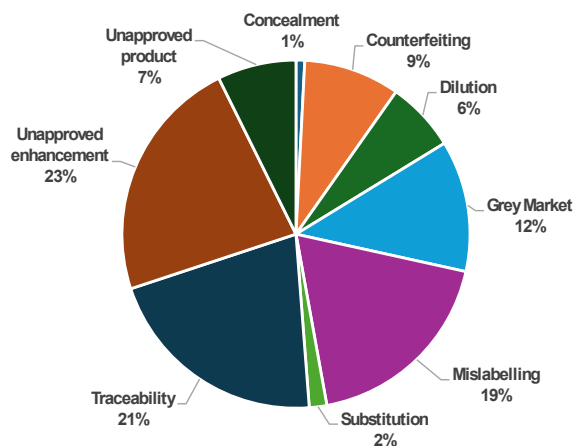


Category Reported Issues June 2025

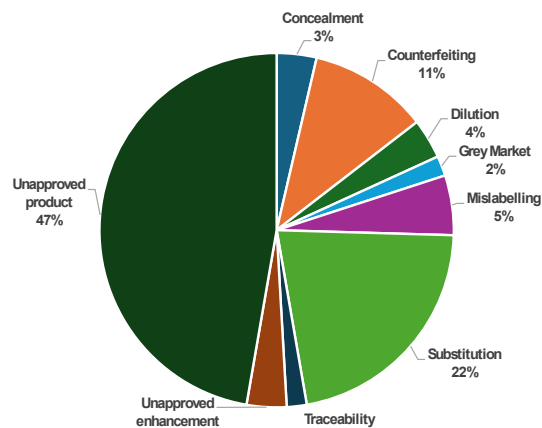


June 2025 has seen an increase in issues related to labelling, authenticity and supply, but a decrease in reported chemistry issues.

Authenticity Issues June 2024



Authenticity Issues June 2025



The distribution of authenticity issues shows considerable differences between June 2024 and June 2025. Reports of unapproved product increased from 7% in April 2024 to 47% in April 2025 and substitution from 2% in June 2024 to 22% in June 2025.

This information comes from the on-line Food Forensics Knowledge Base platform. If you are interested in access to Knowledge Base and would like a (no pressure) 15 min demo please contact barry.hilton@foodforensics.co.uk or info@foodforensics.co.uk

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