



Risk Newsletter

Food Forensics

December 2024

HIGHLIGHTS



- Happy Holidays from the Food Forensics Team. Apart from Bank Holidays, we will be open over Christmas as usual.
- Saffron production may be shorter than usual this year.
- Scammers continue to hit food businesses - raise awareness with staff to look for suspicious activity. Bolster website security.
- Oranges and orange juice have been affected by the floods in Spain and citrus greening in Brazil.
- Organic milk is in high demand with tight supply.
- Olive oil supply looks to have rebounded everywhere except Italy, where the crop is forecast to be 50% down in places.
- Don't forget we are able to support on origin testing if needed.

Produce

Citrus

Andalusia's 2024/2025 citrus harvest is projected to grow by 20%, supported by favourable rains that have improved fruit size, especially for oranges, which are expected to see a 22% increase. Early harvests of mandarins and Navelinas have already begun, but lemon yields are anticipated to drop by 22% from last year's record levels. However, weather disruptions have raised concerns about authenticity and quality. The DANA weather event caused significant losses in citrus-growing areas like Malaga and Almeria, where flooding and torrential rains destroyed crops ready for harvest. Producers in Malaga report damages of €15,000 - 20,000 per farm, with much of the fruit falling to the ground, raising potential issues with misrepresentation or improper sale of damaged or lower-quality produce.

Recent catastrophic floods in eastern Spain also severely disrupted affected persimmon production, forcing UK retailers and wholesalers to source oranges from South Africa and South America earlier than usual. Spanish farmers have faced significant challenges, including damaged crops, obstructed rural roads, and logistical delays, exacerbating fears over the quality and availability of produce.

The flooding has impacted the juice market, compounding the issues seen

with Brazil's smallest orange juice crop in 30 years and Florida's ongoing battle with citrus greening disease.

Some businesses have switched to using mandarin juice instead of orange.

Sicilian citrus fruits, especially those grown near Mount Etna, have suffered from a series of adverse conditions, including ash fallout, drought, heavy rainfall, and high humidity. These factors have caused physical damage to the fruits, compromising their essential oil layer and leading to rapid decay and rot after harvesting.

Water scarcity in northern Peru remains a significant obstacle, affecting lime size and production volumes.

Top Fruit

Poland's 2024 apple harvest, the largest in Europe, reached its second-lowest level in a decade at 3.2 million tons, significantly impacting apple juice concentrate (AJC) production and pricing. High-acidity AJC prices soared to €2,700/MT in October, a 48% year-on-year increase, due to limited supply. This scarcity has driven some buyers to source from Ukraine, raising concerns about traceability and authenticity in the European market. Polish AJC production is projected at 200,000 tons for the 2024/25 season, with tight supplies restricting contract durations to short or medium terms. Although raw apple prices recently fell by 20%, AJC supplies remain strained, sustaining high prices.

In Turkey, the 2024/25 apple production is expected to reach a five-year low due to unusually dry and warm weather, attributed to climate change. Despite the decline in domestic production, apple exports are forecast to rise year-on-year, reaching the third-highest level on record.

Soft Fruit

Egyptian prices for fresh strawberries have doubled compared to the previous season, driven by climate change, reduced acreage, and stricter European Union regulations on plant protection products. These factors have increased production expenses, including the reliance on expensive pesticides, which risks compromising the quality and safety of the produce.

Blueberry production in New Jersey is facing a reduced crop yield due to insufficient water for bud development, this may result in a smaller crop next year.

Stone Fruit

Heavy rain in Australia's Riverland region has reduced stone fruit harvest by 10% with reports of fruit splitting on the trees. Apricots appear to have been particularly badly affected. Shelf life will also be reduced.

The Federation of Fruit Producers of Chile (Fedefruta) has warned that the country's cherry export forecast may be lower than expected due to significant fruit drop. Surveys among cherry producers have shown that many are experiencing premature shedding of fruit, particularly



in the Regina, Santana, Royal Dawn, and Lapins varieties. Despite favourable weather and good pollination, the fruit drop is affecting yields.

The U.S. offshore mango season began with imports from Brazil, facing early disruptions due to port strikes and logistical challenges. Ecuador followed with strong contributions of Tommy Atkins and Ataulfo mangos, though its harvest is expected to conclude early, potentially straining supply. Peru has also entered the market earlier than usual with Kent mangos, which will help meet demand during the holiday season. However, smaller-sized mangos (10-12 count) dominate this year, leading to higher prices for larger fruit.

Grapes

The Mediterranean season is more or less done although you can still find some of the sweepings available, reflecting the exceptionally short market. There are limited quantities coming from Peru and Brazil, these countries also have a huge pull from the USA and Europe. Some retailers are already air freighting from South Africa / Namibia, something that is almost unprecedented at this time of year given the new plantings and 'kilos in the ground'. The situation isn't likely to improve until well into January providing the South Africans manage to get the volumes onto the vessels and there are no major upsets.

There has been a steady supply of fruit from Lebanon, fortunately the supply chain has been unscathed.

South African grape farmers face reduced export yields due to extreme weather, with intense heat in key regions and hail damage in Limpopo's Loskop Valley. In the Northern Cape's Orange River Valley, early October temperatures above 40 deg C caused "flower abscission" where excessive heat led to the detachment of flowers, decreasing grape yields by about 10%.

Bananas

A hurricane in Bolivia has destroyed over 100 hectares of banana crops.

The Fusarium fungus TR4 threatens Colombia's banana industry, with no cure and long-lasting soil contamination that devastates banana yields. Measures like cement paths, disinfectant stations, and TR4-free planting practices have proven effective in slowing spread, potentially yielding \$3-4 in benefits per dollar invested. Despite high awareness

among farmers, risky practices like using unverified corms for planting persist, risking disease transmission.

Avocado

Kenyan avocado exporters face significant challenges due to logistical disruptions in Middle Eastern shipping routes, the usual Suez Canal and Red Sea pathways to Europe are now considered unsafe, forcing ships to take longer, costlier routes via the Cape of Good Hope. This extension impacts the freshness of avocados on arrival, as fruit now arrives in Europe at around 50 days old compared to last year's 30-35 days, leading to near-ripe, lower-quality produce that damages the sector's reputation.

Cranberry

The ongoing drought in New Jersey is severely impacting cranberries. While the drought has led to some improvements in the quality of cranberries, making them sweeter and more concentrated, it has created significant challenges for the harvest. Cranberry farmers are struggling with unusually low water levels, forcing them to use expensive well water and diesel pumps, which has increased costs.

Exotics

The litchi harvest in South Africa has been poor with tight availability. Low volumes mean high prices while shipments from Madagascar are due to arrive in the first week of December supplies look tight for the season.

Salad Crops

Spain: Up to 20% pepper and cucumbers' affected in El Ejido area in Southern Spain following the storms, most crops there are grown under net and plastic. There are many small growers so difficult to quantify true scale. Plenty of availability of tomatoes from Spain and Morocco. Spain has now caught up after a delayed start.

European tomato cultivation declined by 700,000 tons over the past decade, while imports increased by only 400,000 tons, causing supply pressure.

In Italy, tomato shortages and delayed crops due to heat and drought in Sicily have driven prices upwards. Italy's tomato industry faces mounting challenges threatening its sustainability, including climate change, market instability, and poor sector coordination. Rising summer temperatures and water scarcity are compromising both yield and quality, leaving tomatoes vulnerable to scalding

and flower drop, which raises concerns about potential fraud through the mislabelling of substandard or imported produce as authentic Italian tomatoes.

Production in the Netherlands and Belgium has stabilised but higher energy costs and competition from Morocco is still creating challenges for growers.

Supply challenges in coconut production in Sri Lanka could impact the availability of coir as a substrate for the horticulture sector.

Sweet Potatoes

North Carolina, which produces two-thirds of U.S. sweet potatoes, faces a significant supply drop due to environmental challenges. Heavy rain in July followed by a dry August severely impacted crops, with rot causing yields to fall by up to 50%. This reduction in supply has driven up prices, especially during the high-demand Thanksgiving season, though returns remain below production costs due to yield losses. To mitigate risks, U.S. growers are prioritising domestic distribution over exports, focusing on supporting retailers. However, limited supplies and delayed harvests have made it challenging to maintain North Carolina's usual year-round storage program. Tight supply conditions are expected to persist, with further price increases anticipated after Thanksgiving.

Potatoes

Russia faces a steep potato shortage, with harvests down nearly 20% due to extreme weather, creating a domestic shortfall against consumption needs. To address this, the government plans to import potatoes from "friendly" countries.

Across Europe, potato yields are expected to be lower than 2023 on the back of later plantings, perhaps down 10-15% compared to 2023.

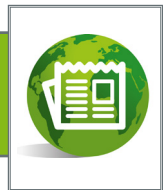
Brassicas

Brassica exports from Murcia, Spain, are lower than expected as a result of wet weather from the DANA (a DANA weather system causes heavy rainfall over a region for several days).

Supply of cauliflower out of California is tight following a delayed harvest as a result of cooler weather.

Mushrooms

Monaghan is the first UK & Ireland producer to grow peat-free mushrooms, removing virgin peat from the growing process switching instead to a sustainable



substrate made from recycled materials.

Spring Onions

The Egyptian spring onion season was delayed as a result of the hotter summer. Some crops had to be replanted. Prices have increased as a result. The later start to the season is likely to result in a later finish with product likely into May, or even, June.

Herbs

The European herb market is grappling with rising prices and logistical disruptions. Geopolitical tensions, such as the war in Israel, have curtailed exports and led to delays due to increased inspections. Similarly, Kenyan herbs face challenges from cancelled cargo flights and high air freight costs, contributing to elevated winter herb prices. To mitigate reliance on volatile imports, there has been increased focus on prioritising European sourcing, including Spain, Italy, and Morocco, and leverage vertical farming techniques.

Ginger & Garlic

A shortage of garlic in India has resulted in imports from Afghanistan. The shortage is the result of reduced plantings last season as farmers switched crops following two poor years of returns for garlic.

Coconut

Coconut prices in Kerala have nearly doubled due to a supply shortage across South India, causing coconut oil prices to surge, with further increases expected. The demand spike, driven by the upcoming Sabarimala pilgrimage season and rising European demand, has fuelled these price hikes.

Sri Lanka's coconut industry is in crisis, with production dropping from three billion to 2.85 billion nuts annually. Inconsistent government policies on fertiliser use, financial strains from foreign exchange fluctuations, and pest infestations have weakened production practices, further compromising crop quality and yield. Additionally, a coconut Mafia allegedly manipulates prices, raising local retail costs significantly. In response, the Coconut Development Authority (CDA) is implementing price controls and financial aid, including subsidies for fertilisers, to support farmers. Meanwhile, increased global demand for coconuts presents export opportunities, prompting the government to facilitate coconut kernel imports for major producers.

Spices

Kashmir's saffron production faces

a critical decline due to drought-like conditions caused by inadequate rainfall and failures in the National Saffron Mission (NSM), an initiative intended to bolster cultivation. Poor planning and execution, including non-functional borewells and an inefficient irrigation systems, have left farmers vulnerable, impacting both yield and authenticity. The lack of operational oversight and farmer involvement has eroded trust, while global competition, particularly from Iranian saffron, threatens Kashmir's reputation.

Belgium's saffron production was impacted by an unusually wet and cold spring, reducing yields compared to previous years.

Nuts

Kern County continues to lead California in almond orchard removals, reflecting a broader trend of reduced almond acreage for a third consecutive year. The reduction stems from challenging market conditions, including elevated production costs and a prolonged period of low prices, which have made almond cultivation unprofitable for some growers. Over 13,895 acres of orchards were removed in Kern alone, alongside a 25% decline in non-bearing acreage state wide since 2021. Despite this contraction, global demand for California almonds shows signs of recovery. Shipments reached record highs, surpassing production by 300 million pounds in the last crop year, with prices rebounding from lows to an estimated \$2.50 per pound for growers. Industry experts attribute this to tightening supplies and strong domestic and international demand, particularly as growers hold back inventory in anticipation of further price increases. Interestingly there was a RASFF report for changes in organoleptic properties of almonds originating from the USA which coincides with increasing reports of bitter almonds - not usually seen from the USA.

The U.S. pistachio crop for 2024 is expected to be slightly below forecasts, between 1 and 1.1 billion pounds, down from the previous years nearly 1.5 billion pounds. This smaller yield, attributed to pistachios' alternate-bearing nature and a later harvest due to high temperatures, still reflects strong demand. New product innovations, like pistachio butter and flavoured kernels, continue to boost demand domestically and abroad. However, export challenges due to regulatory and logistical issues impact the industry's global reach.

Cereals

The 2024 barley crop in the UK faces authenticity and quality challenges, with nitrogen levels at record lows of 1.45% overall, and spring barley nitrogen dropping to 1.44%, the lowest in nearly 30 years. Lower nitrogen complicates meeting malt specifications for brewers and impacts export viability, as continental markets require higher nitrogen content. Increased moisture content (16.6%) adds to on-farm drying and storage costs, raising concerns about grain integrity. A strong sterling has made UK barley less competitive globally, exacerbating export challenges. Domestically, bumper barley harvests (7.2m tonnes) and increased use in animal feed may offset some losses in brewer and distiller demand. For wheat, lower protein levels (12.5% for Group 1 varieties) heighten dependency on imports, emphasising the need for stricter monitoring to ensure product authenticity amidst quality concerns.

Globally, the wheat outlook has tightened with production lower.

Corn

Maize output expectations have increased for 24/25.

Soya bean

Production and exports in Brazil are expected to increase.

Rice

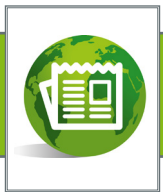
Total global rice production is forecast to be up ~1.5% on last years volumes. Indian local milled white rice prices rose on the back of a shortage of new crop availability. Millers' continue to negotiate with governments to increase custom milled rice rates and storage support.

Rapeseed

Pressure from soyabean price declines has seen reductions in rapeseed futures prices. Imports into the EU have increased mainly from Ukraine and Australia. Planting forecasts for the UK suggest a 17% reduction in the area planted for oilseed rape for 2025.

Coffee

Arabica coffee prices have increased to a 47 year high as drought in Brazil, the top producer of arabica, raised concerns over the 2025-26 crop against a backdrop of already tight supplies. Geopolitical impacts, including Red Sea shipping disruption, potential US tariffs and the European Union Deforestation Regulations



are all supporting prices.

The coffee industry faces challenges with authenticity and quality assurance amidst fluctuating market conditions. Drought in Brazil and heavy rains in Vietnam have affected coffee production, leading to supply shortages and potential quality compromises. Brazil's dry weather during key flowering stages and Vietnam's reduced robusta yields have raised concerns about fraud as producers may mix inferior or counterfeit coffee to meet demand.

Tight inventories and export dynamics also impact market transparency. While global exports have increased, discrepancies in inventory reporting and variations in production forecasts risk misleading stakeholders.

Cocoa

The cocoa season has started and with 40% of global supply from the Ivory Coast, there is considerable focus on that supply. Exports have been variable from there with rains affecting routes in the country as well as impacting fermentation and drying of the beans. Quality is therefore affected. There are concerns as to whether there are adequate stocks to supply the market. Prices have increased as a result.

Tea

Adulteration and imports of lower-quality Kenyan tea are undermining the reputation of Nilgiris tea, valued for its unique taste and aroma. Traders mix cheaper Kenyan tea with locally made tea or label it as Nilgiris tea, misleading consumers and driving down demand for genuine green tea leaves. Despite calls for higher import duties to curb these imports, no government action has been taken.

Wine

The English grape harvest fell by 75% in some regions as a result of the poor weather.

France's agriculture ministry introduced a scheme to address the supply-demand imbalance in the wine industry by paying grape growers €4,000 per hectare to uproot vines. A total of 5,418 growers have agreed to pull up 27,461 hectares of vineyards, receiving €109.8 million in compensation. This decision comes in response to declining wine consumption and a 10% oversupply in 2023, exacerbated by reduced global exports and a shrinking domestic market. Growers must complete the uprooting by June 2025, and those who stop their activity completely will not

be allowed to replant vines until 2029.

The initiative aims to stabilize the market by reducing France's total vineyard area by 3.43%, addressing both economic difficulties and falling wine consumption.

Sugar

White sugar prices hit contract highs at the beginning of November, the highest levels since 2011. A global sugar deficit is expected in 2024/25 of 3.6 million tonnes. Production is down and consumption has increased.

Honey

USA honey production was good with strong yields. Some beekeepers fed their bees earlier than usual after drought resulted in food sources drying up.

There is increasing frustration from Indian beekeepers who cannot compete with "the cartels selling adulterated honey within India". There are also reports of some Indian honey exports filtering honey below 25 microns, making it impossible to determine country of origin from the pollen as this will be removed from the honey.

Olives & Olive Oils

A significant decrease is expected in olive oil prices as Spain forecasts a crop of 1.3-1.5 million tonnes for 2024/25.

Turkey is forecasting a 160% increase in olive oil production for 2024/25.

Greece and Portugal are expecting strong yields and Tunisia is also expecting to reach yields of 340,000- 350,000 tonnes.

Italy is still expecting a disappointing harvest which will have a minimal impact on global production but will keep a price differential between Italian and other origins. While in some areas the olive volume is strong, the oil yields are reduced as a result of rainfall at the end of October. In Sicily, production volumes have more than halved.

Protein

Foot and Mouth Disease (FMD)

The Philippines have imposed a temporary import ban on FMD susceptible animals and products from Turkey following an FMD outbreak in Kirsehir.

African Swine Fever (ASF)

Scotland's wild boar population is being monitored for the disease as concerns increase over a potential outbreak in the UK through non-commercially imported meat.

The Swine Health Information Centre is reporting The Philippines is rolling out an ASF vaccine. Ukraine is urging approval of the AVAC ASF live vaccine, but there remain concerns over international acceptance. In Lombardy, Italy, wild boar culling has increased with 13,000 wild boar culled to date. An outbreak in India has been declared a state disaster.

Avian Influenza

There have been two reports of Avian Influenza in the UK in November - one in Cornwall and the other in Yorkshire. Overall the risk level remains low where there is good biosecurity.

Across Europe there have been 159 outbreaks in November (correct at time of writing) across 20 countries. 102 were on farms, captive birds or backyard flocks. This is lower than the 171 outbreaks reported in October.

There has been a report of avian flu detected in raw milk in California. The company issued a voluntary recall.

A recent case of bird flu detected in pigs on an Oregon farm has raised concerns about food safety and potential pandemic risks. Although the pigs were not intended for the food supply and were euthanased, experts warn that pigs can act as "mixing vessels" for flu viruses, potentially enabling the virus to mutate and adapt for human transmission.

Blue-tongue virus (BTV-3)

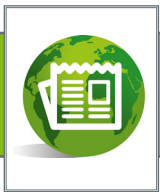
Bluetongue restrictions remain in place in Norfolk, Suffolk, Essex and part of Greater London and Kent.

Chicken

EU broiler prices remain strong compared to previous years. Brazilian broiler remain significantly cheaper than US and EU prices, but all are showing increases. Broiler chick placings have been high for the last three months so an increase in slaughter birds is expected. UK broiler production increased in October, and the Jan-Oct volumes off eggs set is higher than the previous two years indicating increased slaughter volumes should be coming through.

Egg Layer

Eggs set for commercial layers (Jan-Oct), while still down on 2020 and 2021, has shown an increase on the last two years.



Turkey

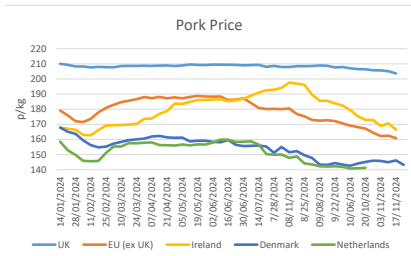
Turkey production was 8.8% down in October compared to the same time last year. Egg set monthly volumes have remained lower than the previous two years. The usual uplift for the seasonal demand is the lowest we have seen.

Pig Meat

The UK pig price has been fairly stable all year but has started to fall, but not as quickly as Ireland. Dutch and Danish prices were reduced in the summer, and it looks as if they are starting to fall again. This has resulted in some significant price differentials between UK and imported pork, making imports attractive. With increased demand in the run up to Christmas and New Year there may be increasing incentive for imports to displace UK pork products. Irish is trading at a 19% discount to UK and Danish at 30%.

Brazil's pork price has increased above EU and US prices, driven by strong domestic demand and high exports (mainly China and Asian regions).

EU pork production has slightly increased with significant increases in production in the Eastern European states offsetting reductions across the rest of Europe.



Dairy

A reduction of 9.3% in GB organic milk production could result in a shortage if consumer demand continues to increase in yoghurt, butter, spreads and margarine. The volume of cows milk carrying an organic claim at retail increased.

Beef

Beef prices have started to increase primarily on the back of lower kill numbers. Supplies are anticipated to continue to tighten and prices likely to firm as demand increases for the festive period.

Lamb & Goat

UK lamb prices are starting to increase. Lamb is still considerably cheaper than beef but the gap has narrowed significantly with new season lamb. The

differential is starting to increase again. High lamb prices increases the risk of substitution with mutton or cheaper meats/origins.

Cod, Haddock & white fish

Icelandic cod prices have increased due to low supply. Atlantic cod supplies are also tight following a 20% cut in cod quotas for the Barents Sea. Haddock prices have similarly increased, China is seeking alternatives. Russia's Pollock total allowable catch is set to increase to 2.29 million tonnes for 2024. Increasing prices in this area are likely to increase demand for cheaper white fish species such as talapia and pangasius.

Salmon

Harvest volumes are lower as demand for Christmas starts to increase. Scottish salmon production falls on the back of lower smolt output.

Molluscs

Climate change is severely impacting Greece's mussel industry, with record sea temperatures in 2024 causing catastrophic losses in mussel farms, particularly in the Thermaic Gulf. Mussel farmers reported a 90% drop in their 2024 harvest, with the 2025 season also compromised due to the destruction of new seed stock. The extreme temperatures, spurred by a series of July heatwaves, exceeded 30 deg C, fatal for mussels.

The Canadian Food Inspection Agency (CFIA) has confirmed the presence of two oyster diseases - MSX (caused by the parasite *Haplosporidium nelsoni*) and Dermo (*Perkinsus marinus*) - in Spence Cove, New Brunswick. While these pathogens do not pose a health risk to humans, they lead to increased oyster mortality and slower growth rates. This is the first confirmed case of MSX in New Brunswick and Dermo in Canada.

Shrimp

The U.S. International Trade Commission (ITC) has voted to impose duties on frozen warmwater shrimp from Ecuador, India, Vietnam, and Indonesia due to negative impacts on the U.S. industry. This follows an investigation by the U.S. Department of Commerce (DOC) prompted by trade petitions from the American Shrimp Processors Association (ASPA). The DOC found that Ecuador, Indonesia, and other countries were engaged in dumping practices, meaning they sold shrimp at unfairly low prices in the U.S. market,

harming local producers.

Fishmeal, Fishoil

Global fishmeal increased ~23% in the first nine months of 2024 compared to the same point in 2023. This has been primarily driven by Peru's anchovy fisheries. Production of fishmeal and fishoil in China as remained flat with reduced wild captures.

Illegal, Unregulated and Unreported fishing (IUU)

The Royal Navy Maritime Domain Awareness Programme (MDAP) and Global Fishing Watch signed an information sharing letter of intent (LoI) to tackle illegal, unreported and unregulated fishing (IUUF).

Animal Food

Pet-food RASFF Alerts & Recalls

Carolina Prime Pet, Inc. recalls "Hollywood Feed Carolina Made Chicken Chips" because of possible Salmonella health risk.

Too high content of ragweed (*Ambrosia* spp) in compound feed for parrots from Italy.

Salmonella typhimurium in raw petfood from the Netherlands.

Enterobacteriaceae in cat food from Turkey.

Two consignments of pet food not subjected to official controls rejected, origin China.

Salmonella spp. in raw pet food from Italy.

Salmonella Spp in processed animal proteins (SOA cat.3) for petfood from Austria.

Salmonella in rabbit meal for petfood production from France.

Enterobacteriaceae high count in dog chews from China.

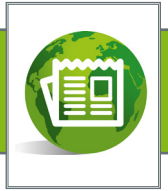
Pet Food General

FEDIAF European Pet Food, the voice of the European Pet Food Industry has unveiled the updated 2024 Nutritional Guidelines for Pet Food for Cats and Dogs.

General

Modern Slavery

US blacklists 29 more Chinese companies over alleged forced labour in Xinjiang. Products made by the 29 companies added to the Department of Homeland Security's Uygur Forced Labour Prevention Act (UFLPA) entity list range from hi-tech inputs, such as



polysilicon, to food products like tomato paste.

Smithfield Foods agrees to pay \$2 million to resolve child labour allegations at Minnesota meat plant.

Environmental

As was expected the EU parliament voted in November to postpone the EU Deforestation Regulation to 30 December 2025 for large companies and 30 June 2026 for small companies. They also adopted a new category of countries posing "no risk" on deforestation. Countries classified as "no risk", defined as countries with stable or increasing forest area development, would face significantly less stringent requirements as there is a negligible or non-existent risk of deforestation.

Checks on goods moving from Ireland to Great Britain

Defra have confirmed that physical and identity checks on non-qualifying goods moving from the island of Ireland to Great Britain will not start during 2024. A further update on the timeline for implementation will be provided by summer 2025.

Australia

NSW farmers face severe impacts from a proposed 22% annual increase in rural water prices from 2025 to 2030. According to NSW Farmers Water Taskforce the rising cost of essential inputs like fertiliser, alongside water, makes farming increasingly unsustainable.

USA

There are increasing concerns over 25% tariff muted to be imposed by the Trump administration on all goods imported from Mexico raising concerns over pricing in the US market. Mexico is a key supplier of tomatoes, avocado's, raspberries, bell peppers, strawberries, lemons, limes, broccoli, cauliflower and more into the US market. It also imports sugar and sweeteners. Beer may also be impacted with Corona and Modelo, Mexican brands, imported into the US.

Canada supplies mushrooms, potatoes and meat into the US markets (as well as being a major supplier of crude oil) and is

also looking at 25% tariffs.

China imports are looking at an additional 10% tariff.

20% of US seafood imports by value would be affected by the proposed tariffs.

Tariffs on agricultural fertilisers, initially imposed by the Trump and Biden administrations, continue to impact global markets, raising concerns about authenticity and price manipulation in fertiliser supply chains. Current duties include a 25% tariff on Chinese fertilisers and a 20% tariff on phosphate imports from Russia and Morocco.

India

In Annamayya district, India, crucial water sources have dried up, leading to sharp reductions in groundnut, tomato, and rice cultivation.

Philippines

The Department of Agriculture in the Philippines is tackling food fraud in the organic sector, particularly the mislabelling of conventional products as organic.

Spain

Border control at Algeciras is unable to cope with workloads, up to 24hr delays on products leaving the port and high production season hasn't completely started yet. Unable to cope with new regulations adding to work loads.

Greece

Farm labour shortages in Greece are creating challenges for agricultural production, raising concerns about potential food fraud and compromised authenticity due to unharvested crops. According to ETHEA, the agricultural sector faces a workforce deficit of approximately 70,000 workers, which threatens harvest of key crops such as olives, vegetables, and fruits. The olive harvest, already delayed by drought, and labour-intensive crops like strawberries are particularly at risk. Compounding the issue, many migrants and farmers on Greek islands are shifting to tourism, further depleting the agricultural workforce. Efforts to address the shortfall through bilateral agreements with Egypt and Bangladesh have been hampered

by bureaucratic delays, rendering workers unavailable when needed.

Weather

La Niña is most likely to emerge in October-December 2024 (57% chance) and is expected to persist through January-March 2025. During La Niña winters, the South sees warmer and drier conditions than usual. The North and Canada tend to be wet and colder.

FSA Alert

The FSA have issued an Amber alert for the risk of distribution fraud thefts from food businesses. We reported last month about the cheese and salmon frauds, this month there are reports of genuine business websites being hacked and details changed with fraudsters pretending to be that business and purchasing thousands of pounds of goods from other businesses. There is increasing activity in this area - be alert to unusual or suspicious activity. Contact your industry body for a copy of the FSA Alert.

This fraud is happening in Europe too with Exotifruit issuing a warning about a scam involving a fraudster posing as an employee of Pissier s.a.s., a French company that primarily deals in grains, not fresh produce. The scammer uses a fake order confirmation from Pissier, complete with an official stamp, and arranges for goods to be delivered to a legitimate warehouse at Rungis.

Peanut

The FSA recalls for peanut in mustard products continued into November and the FSA has not lifted its precautionary warning for consumers with peanut allergies. This incident highlights the need for strong traceability particularly in materials that may be added to multiple products.

Cyber attacks

A ransomware attack on Blue Yonder, demand forecasting and replenishment, automated ordering software, has resulted in shortages of fruit and vegetables in some UK retailers as well as other businesses who use it for labour force management.

Try Our New Paperless Sample Submission App when submitting samples for testing to Food Forensics

If you have not tried out new paperless sample submission solution—the Food Forensics mobile app, designed for both iOS and Android you're missing out! This intuitive, easy-to-use app makes sample submissions faster, more accurate, and more sustainable than ever.

The app is ready for you to start using today! To set up your account, simply email us at appsupport@foodforensics.co.uk, and we'll get you and your team started. Need access for others in your organisation? Just share their email addresses, and we'll include them, too.

For any questions or additional guidance, our team is here to help. We also offer a quick 10-minute demo via Teams—just let us know if you'd like to see the app in action. Click here <https://youtu.be/9677v1cpl6A> to view a quick app explainer video that showcases how easy it is to use.



IN THE NEWS: November

Protein

The Dartford Council in the UK seized 375 lb (170 kg) of illegally imported meat due to ASF risk concerns following an earlier seizure of 3.4 tonnes at Dover.

Over 100 halal certification fraud cases reported in Malaysia.

Ruma Targets Task Force 2 have published a summary of four years of progress against antibiotic use targets.

Arla has partnered with Morrisons, Aldi and Tesco to trial Bovaer® a feed additive shown to reduce enteric methane emissions from cows by 27%. It is a feed supplement that suppresses the enzyme that combines hydrogen and CO2 in the rumen to form methane.

Dairy

Vegetable oil detected in toast cheese in Turkey.

Pakistan's PFA discard multiple adulterated milk samples.

Fish & Seafood

Oceana Group and retailer Woolworths have denied involvement in a counterfeit canned pilchards scheme in South Africa, where expired Lucky Star fish were relabelled and repackaged, posing health risks. Police uncovered the operation in Daveyton, linking it to counterfeit Lucky Star branding and mislabelled Woolworths boxes. Seven undocumented migrants were arrested.

Mary Mahoney's co-owner arrested for seafood mislabelling. The Biloxi restaurant and its co-conspirators apparently misrepresented approximately 58,750 pounds of imported fish as premium local species over several years, deceiving consumers and damaging trust in the seafood market. The fraud involved falsely labelling frozen imports from Africa, India, and South America as high-quality local seafood.

Salmon mislabelling remains prevalent in Seattle, Washington, despite recent legislation aimed at ensuring accurate labelling. A 2022-2023 study genetically analysed salmon from 67 grocery stores and 52 sushi restaurants, revealing that 18% of samples were mislabelled. Mislabelling was especially problematic in sushi restaurants, where 32.3% of "wild" salmon was actually farmed, compared to none in grocery stores. Additionally, 38.7% of sushi samples involved substitutions of wild salmon with other salmon species, financially disadvantaging customers.

The U.S. Food and Drug Administration (FDA) has released a new final Compliance Policy Guide on scombrototoxin (histamine) adulteration in fish and fishery products, and has lowered the acceptable levels for histamine in fish.

Produce

Fruit breeding company Bloom Fresh have won a legal victory over the infringement of its proprietary varieties of grapes in Italy. The owner of the farm at the centre of this had been using media to encourage other Italian growers to ignore intellectual property laws and illegally plant. This is the second case this grower has lost against plant breeders.

High number of reports of mycotoxins in dried figs from Turkey.

Customs officials in Piraeus, Greece, recently seized 51 kilograms of cocaine, hidden within a banana container, with an estimated value of over €2.3 million. The drugs, originating from South America, were concealed in the cooling machinery of the shipment and detected using a specially trained detection dog.

Four of the largest potato processors in the United States are accused in a pair of new lawsuits of conspiring to overcharge grocery stores, other commercial buyers and consumers for years. Lamb Weston (LW.N), McCain Foods, J.R. Simplot and Cavendish Farms illegally fixed prices for frozen French fries, hash browns, tater tots and other products, Pennsylvania grocery chain Redner's Markets alleged in a lawsuit filed on Friday in Chicago federal court.

The Singapore Food Agency (SFA) has seized around one tonne of fresh and processed produce illegally imported from Malaysia. SFA found undeclared and under-declared produce such as tomato, spring onion, iceberg lettuce, cut cauliflower and sliced lemon imported by two importers in the two trucks. All illegally imported produce were seized.

The European Public Prosecutor's Office (EPPO) is investigating a suspected €2 million subsidy fraud related to vegetable cultivation projects in Romania.

Beverage

At least six people have died of methanol poisoning in Laos. Methanol is significantly cheaper than ethanol but can be fatal even in small quantities. Authorities are investigating.

Nigeria's NAFDAC conducted a significant raid on wine shops in Nasarawa State,

targeting counterfeit and adulterated wines and spirits. The operation resulted in the seizure of products worth over N41.2 million. NAFDAC's Investigation and Enforcement team is working to trace the importers or manufacturers behind these fake products.

In a sophisticated food fraud, the family-run business Viothek Hauser targeted by fraudsters posing as a reputable distributor placing an order worth £52,000 for 6,500 bottles of premium wine. The criminals used a hijacked identity, complete with the distributor's VAT number and French SIREN code, passing verification checks. The wine was picked up by a haulier arranged by the fraudsters and was delivered to a Paris warehouse, but a second truck later absconded with the goods, leaving no payment. German and French police continue to investigate, suspecting that the wine might have been smuggled into Russia's black market, where high-quality European wines hold significant value.

Oil

Stone pressed olive oil from Gift Olives adulterated with lower quality olive oil in Turkey.

Olive oil from the Egetad brand recalled due to high MOAH levels in France.

India's FDA seized 790 litres of adulterated Sunflower Oil at Agrawal & Co.

Spices

Food Safety Officials in Hyderabad uncovered food fraud during inspections of ginger-garlic paste production units in Katedan. Investigators found synthetic food colours being added to the paste and seized 1,400 kg of ginger-garlic paste and 50 kg of synthetic colours from Umani Foods and SKR Foods.

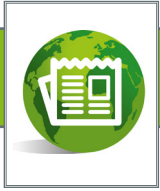
Honey

Marlenka flower honey recalled due to low Diastase activity in the Czech Republic.

Mut local products honey from Turkey found to be counterfeit.

A recent investigation revealed widespread adulteration in honey sold by large British retailers, with over 90% of samples failing authenticity tests based on DNA profiling.

Mixed forest honey was recalled in the Czech Republic due to not meeting the legislative requirements for honey composition.



FOOD SAFETY: November

Country No of Alerts

France	76
Turkey	46
Belgium	34
Italy	29
United States	29
Germany	28
Poland	19
Canada	16
Spain	16
United Kingdom	16
India	13
Pakistan	12
Netherlands	10
Sweden	10
Austria	9
Czechia	9
China	9
Ireland	9
Brazil	9
Denmark	9
New Zealand	8
Egypt	7
Ukraine	7
Israel	6
Nigeria	5
Norway	5
Greece	5
Finland	5
Australia	5
Argentina	5
Hungary	4
Iceland	4
Luxembourg	3
Indonesia	3
Iran	3
Uzbekistan	2
Singapore	2
Slovakia	2
Colombia	2
Belarus	2
Russia	2
Venezuela	2
Morocco	2
Vietnam	2
Serbia	2
Slovenia	2
Romania	2
Switzerland	2
Albania	1
Moldova	1
Mali	1
Sudan	1
Ethiopia	1
Croatia	1
Peru	1
Latvia	1
Paraguay	1
Syria	1
Bosnia and Herzegovina	1
Chile	1
Burkina Faso	1
Ecuador	1
Malawi	1
Chad	1
Oman	1
Hong Kong	1
Senegal	1
Lebanon	1
Thailand	1
Total	530

SUMMARY



There were **452 Red**, **43 Amber** and **35 Green** for a total of **530 safety alerts and product recalls*** in November.



The majority of alerts were for bacterial pathogens and pesticides (35.2% and 11.5% respectively). Natural contaminants rose to third (for the first time this year) with 11.3%.



187 Bacterial pathogen alerts (52% Salmonella, 30% Listeria); E.coli accounted for 11% of which 70% were STEC.



61 Pesticide alerts (23% Chlorpyrifos, 11% Acetamiprid and 5% Thiamethoxam)

Top 3 alerts by commodity

- 1. Ingredients:** Nuts & seeds, herbs & spices, rice/pasta/noodles
- 2. Protein:** Chicken, sausages and other mixes
- 3. Produce:** Fruit, dried fruit and vegetables

Top 3 number of alerts by county of origin

- 1. France:** Cheese, sausage, fish
- 2. Turkey:** Dried fruit, fruit, nuts & seeds
- 3. Belgium:** Ready meals, biscuits and beef

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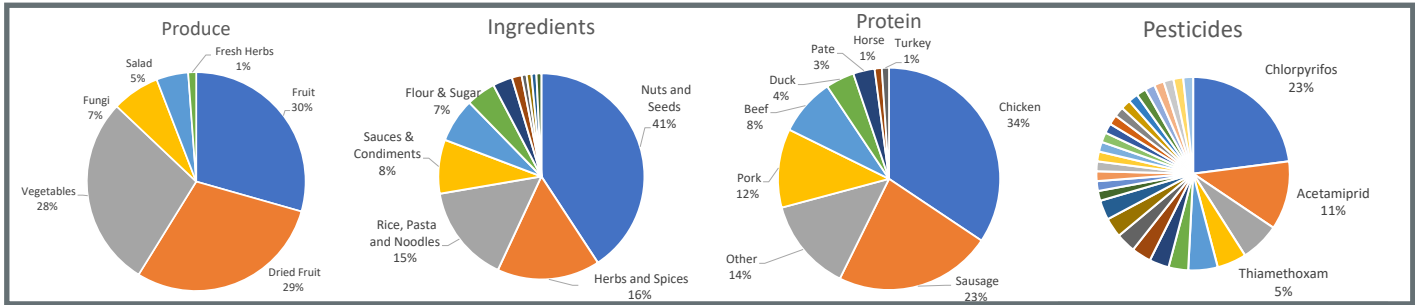
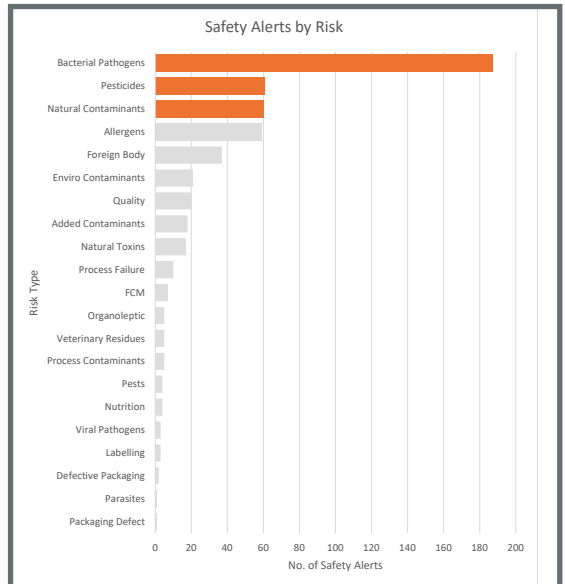
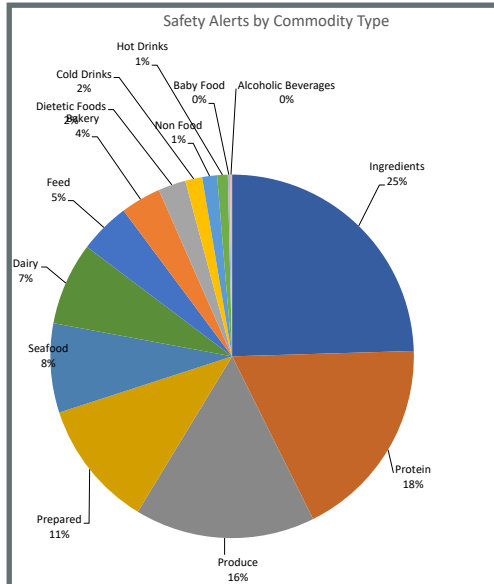
For more information about Knowledge Base, Testing & other services.

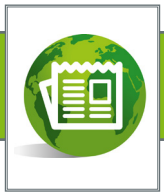
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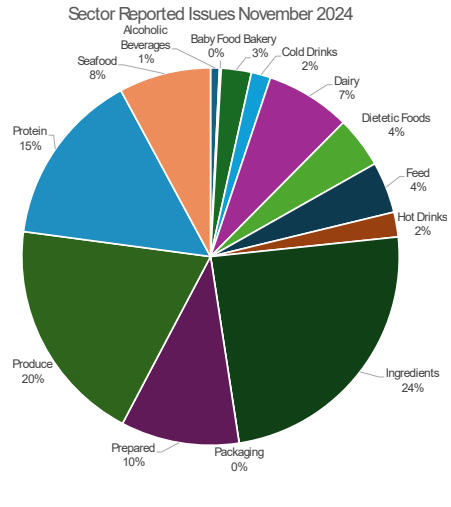
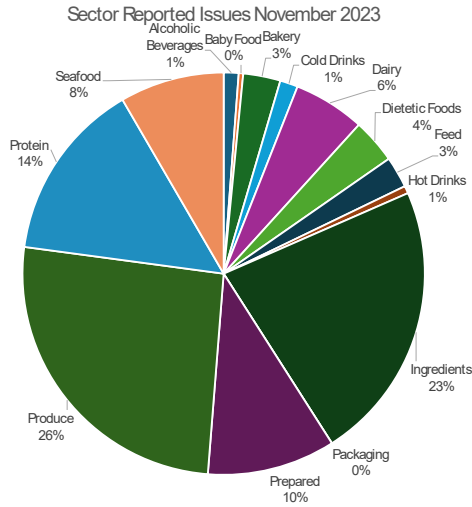
<https://www.foodforensics.co.uk/>

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



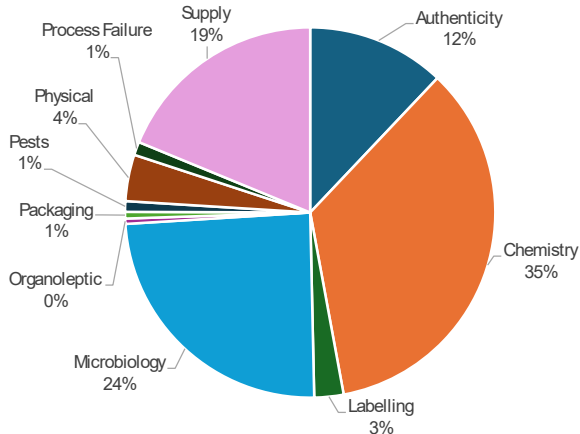


Knowledge Base Trends

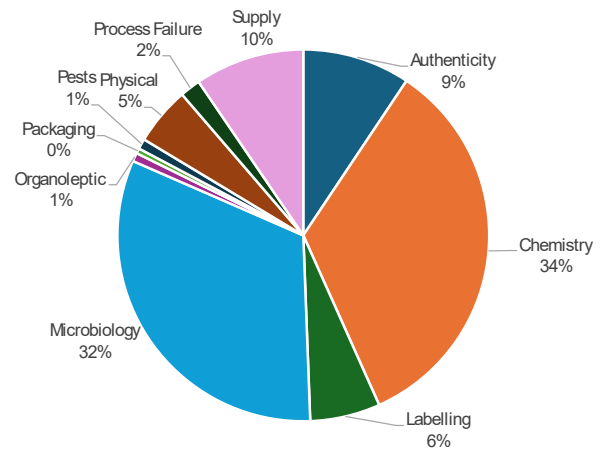


2024 has seen an increase in issues reported in cold and hot drinks. The proportion of issues related to produce have reduced.

Category Reported Issues November 2023

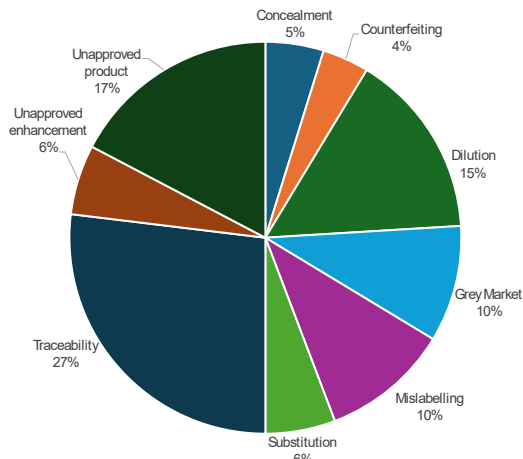


Category Reported Issues November 2024

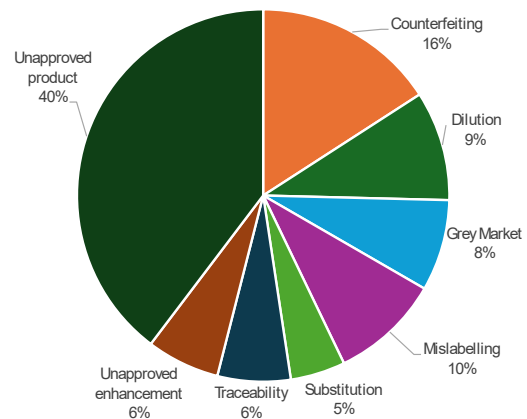


November 24 has seen a significant increase in microbiology issues compared to the same time last year, supply and authenticity issue have reduced but labelling issues have increased.

Authenticity by Type November 2023



Authenticity by Type November 2024



A huge increase in unapproved products in November 24 compared to November 23 when traceability issues dominated. Counterfeiting issues have also increased.

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