








Risk Newsletter

Food Forensics

April 2025

HIGHLIGHTS

-  Heavy rainfall in Spain, Morocco and Tunisia impacts fruit and vegetable production.
-  Low volumes of oranges for juice and poor quality increase the risk of juice substitution or added sweeteners.
-  Tunisia's tomato production expected to drop by 40% next season limiting supply of sun-dried tomatoes.
-  Potential for Chinese garlic to fill shortfall in Spanish supply.
-  Price differential between Italian and Spanish/Greek Extra Virgin Olive Oil (EVOO) widens making food fraud an increasing risk.
-  Ireland diverts butter supplies to U.S. ahead of tariffs.
-  U.S. faces severe egg shortage due to avian influenza (H5N1).



Produce

Citrus

Due to persistent rains in Spain, along with frosts in Murcia and Alicante, lemon supply has been significantly reduced, against a high demand. The rainfall has hindered harvesting, and combined with the early end of the Turkish lemon season (which was impacted by frost), the market is facing shortages. This has led to a price increase. The Spanish lemon season is expected to finish earlier than usual, with a gap until the Southern Hemisphere season begins, particularly from South Africa and, to a lesser extent, Argentina.

Egyptian lemons are alleviating the shortage, though concerns over regulatory compliance exist. In addition to lemons, a gap in grapefruit supply is anticipated for May and June.

The European Union (EU) has extended its citrus black spot (CBS) measures on South African citrus for an additional three years. Despite these challenges, the EU remains a key market for South Africa, receiving 35% of the country's citrus exports.

Citrus greening, also known as huanglongbing (HLB), a deadly citrus disease, has been confirmed in Nogales, Arizona, marking the first-ever discovery of the disease in the state. The U.S. Department of Agriculture (USDA)

detected infected Asian citrus psyllids during routine monitoring in December. As a result, the Arizona Department of Agriculture established a quarantine. Arizona is the ninth U.S. state to implement such a quarantine. Florida's orange crop for 2024/25 is forecast at a 95-year low, down 35% from the previous season, due to Hurricane Milton and citrus greening disease. Despite the decline, Florida remains a key supplier for U.S. orange juice.

The low quality has resulted in bitter-tasting fruit. This increases the risk of other, sweeter juices or added sweeteners being used in juices to compensate for this.

Top fruit

Drought conditions in Southern Australia have driven large numbers of birds, particularly lorikeets, into orchards in search of food. Apple, cherry and fig producers in the Adelaide Hills have reported widespread damage.

Mid-season UK wholesale apple prices have surged by 25%, rising from £1.10 to £1.37 per unit, marking the highest percentage increase among apple categories. In contrast, late-season apples saw a significant decline, dropping by 20% from £2.08 to £1.67. Conference pears also experienced a slight 2% decrease, falling from £1.27 to £1.25.

Soft fruit

Southern Italy's strawberry harvest is struggling with lower-than-expected yields, disrupting supply at a time when production should be at its peak. Temperature fluctuations have slowed ripening, while limited imports from Spain have further tightened availability. Improving temperatures are expected to boost production by 15% in the coming days.

Prolonged rainfall and high humidity in southern Spain have severely impacted strawberry production. Excess moisture accumulating in macro-tunnels has delayed fruit ripening and reduced quality. Improved weather from late March is expected to enhance fruit quality.

Tornadoes and heavy rainfall from Storm Laurence have devastated soft fruit greenhouses in Huelva, Spain, destroying infrastructure and damaging strawberry, blackberry, raspberry and blueberry crops. The destruction adds to ongoing concerns over excessive rainfall.

Heavy rains in Morocco halted strawberry exports for two weeks due to quality deterioration from prolonged water exposure. The affected harvest is being redirected to frozen stocks. The rainfall is ultimately beneficial for the drought-stricken region.



Grapes

Freezing temperatures in Turkey's Manisa province have severely damaged crops, particularly in the Alasehir district, a key table grape-growing area. As a result, exports remain lower than last year.

Stone Fruit

Exceptional rainfall during the growing season has severely impacted Tunisia's 2024 date harvest, with significant yield losses reported. This is expected to cause supply shortages, particularly in the latter half of the marketing season (August to October). Neighbouring Algeria, another key producer of Deglet Nour dates, has faced similar losses. As a result, prices are currently 20% higher than last year, with the possibility of further increases.

Avocado

Mexican avocado exporters have paused harvests due to a 25% tariff imposed on exports to the U.S., which was temporarily suspended on March 6, 2025, after just three days. The U.S. government will decide on the tariff's permanency by April 2, 2025, leaving the industry uncertain.

The Mexican avocado sector, heavily reliant on the U.S. market, faces challenges with its price-setting role and is now exploring alternative markets in Europe and the Middle East. However, logistical costs and the benefits of the Mexico-United States-Canada Agreement make these alternatives less attractive.

Mango

The Mexican Ataulfo mango season has begun, with shipments set to head to Europe. Larger volumes than last year have been reported, although fruit availability is still limited, keeping prices high. Better-quality mangoes and more stable prices are expected within two weeks as volumes increase.

US President Trump's import tariffs have created an opportunity for exporters to diversify into Europe even though US markets remain more attractive despite the 25% tariff increase.

Melons

Cold temperatures and persistent rainfall since November have severely impacted melon exports from Central America, particularly in Costa Rica, Panama and northern Colombia. The Humboldt Current effect, occurring every seven years, has led to unseasonal rain during the dry

season, reducing yields and quality. Galia and Cantaloupe melon volumes are down by 50%, while watermelons and mini-watermelons have declined by 30-40%. Increased humidity has caused larger fruit sizes but lower Brix (sugar) levels, affecting quality. Due to these challenges, the melon export season will end two weeks earlier than usual, with peak volumes concluding by weeks 14/15 instead of 16/17.

Bananas

Banana supply at the start of 2025 is lower than usual due to La Nina and unusually cold weather, particularly in Central America. This has caused challenges for the banana industry, which is already dealing with extreme weather events, diseases, logistics disruptions and increasing labour and transportation costs.

The production of bananas is currently down compared to last year, and while the supply chain is expected to normalise in Q2 2025, the impact of weather and disease remains a critical issue. Demand for both conventional and organic bananas is strong, with organic bananas seeing especially high demand.

Exotics

Pineapple farmers in Bangladesh are under scrutiny for using chemicals to accelerate fruit growth and ripening, raising concerns over consumer health. Driven by high demand during Ramadan, many growers are reportedly applying excessive hormones to bring their produce to market earlier. While government regulations allow limited hormone use to improve flowering, some farmers are exceeding safe levels.

The supply of Costa Rican pineapples has been tight this year, leading to higher prices. However, relief is expected soon, with more shippers turning to Mexico as an alternative source for pineapples, as infrastructure in Central America develops. Prices are expected to decrease gradually as supply improves.

Colombia has become the world's leading producer and exporter of cape gooseberries, reaching \$43.5 million in exports in 2024, a 9.4% growth from 2023. The fruit is now among Colombia's top five fruit exports, alongside bananas, avocados, Tahitian limes and gulupa (purple passion fruit). Europe and North America are the main export markets, with the Netherlands being the largest importer. The demand for cape gooseberries has

seen significant increases in Germany and the UK. Colombia accounts for 94% of global production. The fruit's rising demand is positioning it as one of the most promising exotic fruits globally.

Tomatoes & Peppers

Greenhouse vegetables including tomatoes, peppers and aubergines (eggplants) are starting slower in Europe. While peppers and aubergines are beginning to appear, tomatoes are in short supply with prices rising due to a lack of quality produce from Spain and Morocco. This has resulted in higher prices for items like beef tomatoes, but the forecast is optimistic for a production increase as weather conditions improve in Europe.

A new bilateral agreement between Moroccan and French tomato producers was expected to be signed in mid-March to regulate the import of Moroccan cherry tomatoes into France. The agreement aims to prevent Moroccan tomatoes from competing directly with local French production at the start of the season. Moroccan tomato growers deny this agreement has been made.

The Italian industry tomato sector, particularly in Puglia, is facing a significant crisis due to an ongoing drought that has drastically impacted crop production. In 2025, the area designated for tomato cultivation in southern Italy could decrease by approximately 30%. The downturn in production is expected to impact the availability of industry tomatoes, a critical segment for Italy, which is the third-largest global producer after China and the USA. The reduced tomato production could affect both the supply chain and market dynamics, leading to potential shortages or price increases for industry tomatoes.

Tunisia's tomato production is expected to drop by 40% next season due to declining profitability, making fresh tomatoes more expensive and reducing supply for sun-dried tomato producers. Most fresh tomatoes are directed to paste factories, further limiting availability for drying. As a result, prices for sun-dried tomatoes is expected to rise by at least a third. While Italy remains the primary market, Tunisian exporters are exploring opportunities in Turkey and North America. Competition from Turkey is strong due to its established networks and large production, but Tunisian producers emphasise their more hygienic drying methods and quality control.



Cucumber

The Food and Veterinary Service (FVS) of Latvia identified elevated levels of the pesticide etoxazole in cucumbers imported from Turkey.

In Europe, cucumber prices remain below the five-year average. In Italy, Sicily dominates production until late spring. Spain's cucumber season is ahead of schedule, with prices strengthened by limited availability, especially in Andalusia, which accounts for 70% of Spain's cucumber exports. In France, supply will increase in April as the peak season begins, while Germany's cucumber season is facing fluctuating light conditions, leading to limited availability and higher prices. In Morocco, prices have dropped as European demand declines with the start of local harvests, though contract prices for smaller Dutch varieties remain stable.

Leafy Vegetables & Brassicas

Heavy rainstorms have led to significant flooding in the Murcia region of Spain. The flooding has severely affected the harvesting process, especially for brassicas such as broccoli and cauliflower which now need to be harvested manually due to muddy conditions. Access to fields for heavy machinery has been impossible, leading to limited supply. Leafy vegetables such as lettuce, spinach and kale have also suffered significant damage, with concerns about fungal growth due to excessive moisture. As a result, producers are facing a shortage of produce and supply will remain limited for the coming days. Flooding may well increase microbiological risk in leafy salads.

Potatoes

Two consignments of Polish ware potatoes tested positive for Ring Rot (*Clavibacter sependonicus*) during routine inspections, prompting stricter checks in the UK. The UK Plant Health Service is working with Poland's National Plant Protection Organisation to trace the source of the infection. The UK has increased inspections of Polish potato consignments to 100% and expanded latent testing from 200 to 400 tubers. Any suspect consignments will be held for diagnosis. Infected consignments will be destroyed under a Statutory Plant Health Notice, and additional surveillance will target potentially infected areas, including production sites and machinery.

Wireworm damage is becoming an increasing threat to potato crops across the UK, particularly in eastern counties and the Scottish borders. Wireworm larvae can cause significant crop downgrades and facilitate the entry of rot and disease into tubers.

UK potato growers are facing a seed shortage for 2025, continuing issues from the previous year. The British Potato Trade Association (BPTA) attributed the shortage to lower seed yields in England in 2023 and 2024, rising overseas demand and fewer growers willing to invest in seed potato production. Brexit has also had a significant impact, as EU seed potatoes can no longer be traded or marketed within the UK, limiting imports and exports.

Ginger

Ginger prices have risen in North America due to limited supply from Costa Rica and Peru, while Chinese ginger into the USA faces tariff concerns. Brazil will boost availability in May. In Europe, Germany's market struggles with declining demand and quality issues, Italy relies on Chinese ginger, and France maintains stable prices. China faces export pressure from Brazil and Peru, while South African prices are stabilising after shortages. Brazil strengthened its U.S. market position with increased production, and Peru anticipates a supply surge but faces quality risks. Costa Rican prices are high due to shortages, with ongoing concerns about supply stability.

Despite its dominance in the European market, China faces challenges with pesticide residues due to continuous cultivation techniques. It is therefore imperative to test for pesticide residues in these products.

Garlic

Early Italian garlic varieties are due to be harvested in late April to early May. Reports of high yields in Egypt have led to concerns that this could lower prices for European garlic. Potential new tariffs from the U.S. could negatively impact Spanish garlic exports, which are already facing a critical supply deficit and rising prices. A shortage of European garlic and has led to increased imports from South America and China into the USA, with additional tariffs affecting prices.

Due to a significant reduction in Spanish garlic production, the availability of

Spanish garlic has decreased by 30-40% compared to previous years. As a result, European importers are increasingly turning to Chinese garlic to meet demand, despite the additional tariffs on imports outside the World Trade Organization (WTO) quota. This shift raises concerns about food safety and labelling, as garlic from China may be subject to different agricultural practices and quality controls compared to Spain. There is potential for any shortfall in Spanish supply to be filled by Chinese garlic. This situation highlights the challenges of maintaining consistent food safety standards and traceability amid sourcing shifts, especially when alternative imports may not meet the same standards.

An unidentified disease is rapidly devastating garlic crops in India, causing plants to yellow and dry up within days. Farmers, who invested heavily in garlic as an alternative to ginger, are facing huge potential losses.

Coconut

In Malaysia, the Federal Agricultural Marketing Authority (Fama) is addressing a coconut shortage, particularly in Malaysia's east coast states, by importing 650 metric tonnes of coconuts. The shortage has led to price fluctuations, with coconut milk prices varying between regions. While some areas see sharp price increases, others maintain stable prices.

A coconut shortage in Indonesia caused by extreme weather, pests and high export volumes, has disrupted production. Despite rising global demand, the government is considering an export levy and potential moratorium to stabilise domestic supply.

Spices

In India, turmeric prices have risen by 3.11% due to concerns over a 10-15% expected decline in crop yields this year. Despite a 10% increase in turmeric acreage, rains have tempered expectations for higher overall production.

The lower yield and price increase, alongside higher imports, may heighten the risk of turmeric adulteration or substitution. With market pressures on supply, there could be a higher incentive for fraudulent practices, such as mixing turmeric with cheaper substances or mislabelling inferior grades of turmeric to meet the growing demand. The sharp price fluctuations and potential supply



shortages make it essential for both consumers and regulators to remain vigilant against food fraud in the turmeric market.

Nuts

The tightening U.S. walnut supply, driven by reduced acreage and adverse weather, has led to rising prices amid strong demand. While sales have increased significantly in recent years, the 2024/25 crop fell 11% short of USDA projections, intensifying supply concerns. Substitution risk is a concern from alternative sources like Chile and China.

The U.S. almond and pistachio industries face challenges due to retaliatory tariffs imposed by China, announced on March 4. The U.S. exports over 70% of its almonds and 75% of its pistachios, with China being a key market. In response, the almond industry has worked to diversify exports, focusing more on markets such as India and the U.K., which present growth opportunities. The U.K. in particular has become an increasingly important market for U.S. almonds as the industry adapts to the changing trade landscape.

Wheat & Rice

Wheat export prices also rose globally, with Russian prices increasing by 4% due to tighter domestic supplies and currency strength. U.S. wheat prices climbed by 4% amid higher demand and concerns over crop conditions, while Argentina's wheat prices similarly rose by 4% due to competitive pricing and strong exports.

Rice prices dropped, with the FAO All Rice Price Index falling by 6.8% from January. India rice prices declined across Asia due to weak import demand and favourable harvest prospects in Vietnam, India and Thailand. In India, a weakening rupee added to the downward trend, while in the U.S., competition from South American exporters and trade policy uncertainties pressured prices further.

On supply, EU soft wheat production forecasts were slightly lowered but still expected to rebound from 2024's rain-damaged crop. Germany's wheat harvest is projected to grow 15.4%, potentially boosting exports if weather conditions remain favourable.

Soya bean

A study using climate model simulations and crop models has found that climate

change with 2 degrees Celsius of global warming could cause production deficits. Deficits could worsen by 50% in the U.S. and South America due to stronger heat-moisture interactions. This highlights the growing impact of climate change on global soybean yields, stressing the need for adaptation strategies to cope with future agricultural shocks.

Brazil's soybean harvest is ahead of last year, and improved crop conditions in Argentina are adding bearish pressure to the global oilseeds market.

Rapeseed

Paris rapeseed futures rose last week, the increase driven by a strong EU market and price corrections. Weather risks persist for the 2025 crop, and EU rapeseed imports have risen. Germany's 2025 winter rapeseed harvest is forecast at -5.2% YoY. China's 2025/26 rapeseed production is projected at 15.9 Mt (+0.3 Mt YoY), with favourable weather boosting yields. Chinese rapeseed oil imports in February surged and demand for Australian canola (rapeseed) is rising.

Corn

China's corn production is expected to reach record levels in 2025, reducing its need for imports. US still remains the largest corn producing country despite China's production growth. Poor weather in Argentina has impacted production.

Coffee

Coffee prices rose due to dry weather in Brazil and a stronger Brazilian real, discouraging exports. Minas Gerais, Brazil's key arabica region, received below-average rainfall, worsening supply concerns. Additionally, robusta inventories hit a two-week low, supporting prices.

Supply fears persist as Brazil's February green coffee exports fell 12% YoY, and the government forecasts a 4.4% drop in the 2025/26 coffee crop. Vietnam, the world's largest robusta producer saw a 20% decline in production due to drought, though February exports increased 6.6% YoY.

Long-term concerns remain due to Brazil's driest weather since 1981 and lingering El Nino effects in Colombia. While the USDA forecasts higher global coffee production in 2024/25, coffee stocks are expected to drop to a 25-year low, and global arabica deficits could widen for a fifth consecutive

year. There is also a growing risk of substitution with robusta beans, which are typically cheaper but considered of lower quality than arabica.

Cocoa

Cocoa prices have declined sharply from previous highs as the market is expected to shift into surplus in the 2024/25 season. Despite this, tight stocks and ongoing supply risks could lead to continued volatility. Market participation has decreased, contributing to price swings, and cocoa has gone from one of the best-performing commodities in 2024 to one of the worst in 2025.

Supply forecasts have improved, with major producers like Ivory Coast, Ghana and Ecuador set to increase production. Global cocoa output is projected to rise by 8% YoY to 4.84 million tons. Meanwhile, demand has weakened due to high prices, with cocoa grindings falling 3.2% YoY in the fourth quarter of 2024.

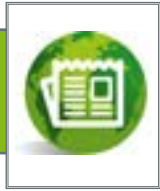
The global cocoa market is forecast to see a surplus of 142,000 tons in the 2024/25 season. However, with stocks at historically low levels after three years of deficit, the market remains highly sensitive to any supply disruptions. While the outlook suggests lower prices ahead, uncertainties related to weather conditions and production risks could still impact future trends.

Tea

Auriga Research has signed Memorandums of Understanding with the Assam government and the Tea Research Association to establish a food and pharmaceutical testing laboratory. This initiative aims to enhance the quality testing of food and pharmaceutical products, particularly focusing on the tea industry. The lab will support research and development, ensuring product safety and regulatory compliance for the growing tea and food sectors in Assam.

Vegetable oils

A Mexican study on avocado oil has revealed concerns around authenticity. High production costs and lack of testing make the oil vulnerable to adulteration. Despite the 2021 approval of a non-mandatory standard (NMX-F-811-SCFI) aimed at ensuring avocado oil quality, food fraud remains, with producers often mixing avocado oil with cheaper oils. Mexico, a leading producer and exporter

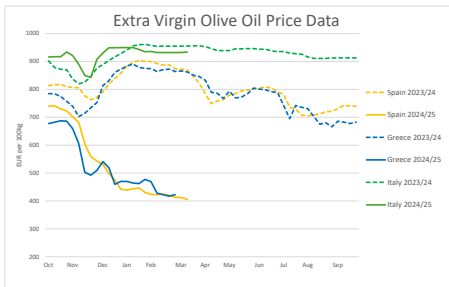


of avocado oil, collaborated with the U.S. in Codex Alimentarius to establish a global purity standard, which was approved and included in the CXS-210-1999 guidelines. However, a recent analysis of Mexican avocado oil brands found that only a few complied with the NMX-F-811-SCFI and CXS-210-1999 standards. Some brands contained adulterated oil, such as high-oleic canola and safflower oils. The findings highlight the risks of food fraud.

Efko, one of Russia's largest agro-industrial companies, has shut down two sunflower oil plants due to unprofitable market conditions, particularly for exports. The company cited high raw material costs and poor harvest.

Olives & Olive Oils

Italian EVOO continues to maintain an increasing premium price over Spanish and Greek EVOO, raising concerns over food fraud and authenticity, particularly regarding mislabelling and adulteration. The price drops seen in Spanish and Greek EVOO brings them in-line with the 5-year averages for these oils, whereas Italian EVOO is approximately 300 EUR per 100kg above its 5-year average.



Honey

Serbia faces significant food fraud concerns in its honey market, with nearly 47% of products failing to meet authenticity standards. Fraudulent honey is often adulterated with sugar syrup or artificially coloured.

Protein

African Swine Fever (ASF)

Outbreaks of African swine fever have occurred in March 2025 in wild boar in Germany and Poland resulting in further restricted zones being added to EU regulation 2023/594.

UK pig farmers are being urged to strengthen biosecurity against African swine fever (ASF) which is spreading

in Europe. Government and industry discussions stress the need for contingency plans, as an outbreak could severely impact farms. Authorities are also pushing for stricter border checks to prevent ASF from entering via illegal meat imports.

Avian Influenza (H5N1 AI)

The first recorded case of avian influenza (H5N1) in a sheep has been confirmed in Yorkshire, UK. The infection was detected through routine surveillance on a farm where avian flu had been confirmed in captive birds. The infected sheep was culled, and further testing found no additional cases in the flock.

Blue-tongue virus (BTV-3)

Confirmed cases of BTV-3 continued to rise in March. The latest information and Interactive Disease Map is available from the [AHDB website](https://www.ahdb.co.uk).

Foot and Mouth Disease

7th March 2025, the UK government implemented an import ban on cattle, pigs, sheep, goats, deer and their untreated products from Hungary and Slovakia to prevent the spread of foot and mouth disease (FMD) following a confirmed case in a cattle farm in Hungary. The restrictions cover live animals, meat, dairy and certain animal by-products, effective from March 8, 2025. The UK Chief Veterinary Officer has urged livestock keepers to remain vigilant for FMD symptoms and maintain strict biosecurity practices. The government has also pledged to protect farmers through continued monitoring and potential further restrictions.

Dairy

The European cheese market, particularly in Ireland, is seeing strong demand for mozzarella and cheddar. Mozzarella prices have surged recently due to tightening supply, now at €4,350/mt in Europe, while cheddar remains stable with mild cheddar at €4,850/mt. Foot and mouth disease outbreaks in Europe have disrupted dairy markets, impacting milk pricing and trade flows. UK butter stocks are reported to be low with Irish butter having diverted to the US ahead of expected tariffs.

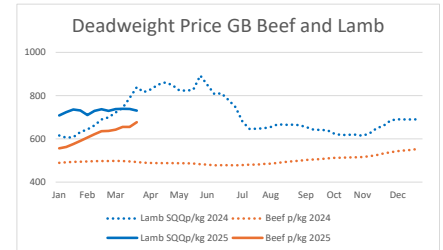
Beef

GB beef prices continued to grow in March 2025, with prices at 676.8 p/kg compared to 492.6 p/kg in March last year. With lower priced imports from Non EU countries such as Australia (up 156.2%

YoY), Paraguay (up 165% YoY) and Brazil (up 43.5% YoY) the risk of substitution remains high.

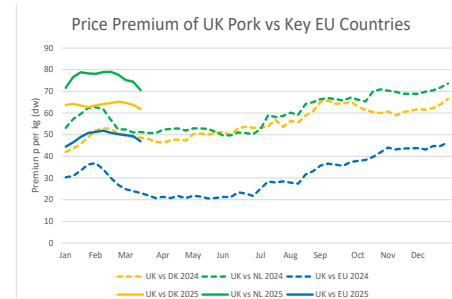
Lamb & Goat

GB lamb prices continue to remain stable and are now lower than last year (down 108p/kg). 2025 has seen both lower supply and weaker domestic demand. The price differential between GB lamb and beef continues to narrow.



Pig Meat

UK pork prices remain at a premium to EU origins therefore vigilance against food fraud and mislabelling of origin remains a continued risk. The U.S. is a key destination for UK pork exports. The impact of the changing U.S. trade agreements and resulting tariffs brings uncertainty to the market.



Chicken & Turkey

Canada is cracking down on food fraud related to spent fowl misrepresentation, where broiler chicken is falsely declared as spent fowl to evade tariffs. This fraudulent practice distorts markets, harms Canadian poultry farmers, and could mislead consumers by introducing lower-quality meat into the supply chain.

Egg Layer

The U.S. faces a severe egg shortage due to bird flu outbreaks and the culling of millions of poultry. The U.S. reached out to European countries such as Denmark and Sweden, seeking assistance to address its egg crisis. Finland rejected exporting to the U.S. citing logistical challenges and the absence of established export protocols.



The situation underscores the complexities of international agricultural trade, requiring strategic agreements, protocols and careful negotiations before exports can take place.

The U.S. has nearly doubled Brazilian egg imports and is considering relaxing regulations on broiler chicken eggs to combat egg shortages. Brazilian eggs, once restricted to pet food, are now approved for human consumption despite Brazil's issues with Newcastle disease.

Salmon

Spot prices for Norwegian farmed salmon are expected to ease in week 10, while prices for Chilean salmon fillets are continuing to rise in the US market. Scottish salmon prices remain stable. Prices for Atlantic salmon in China dropped for the second week in a row, increasing losses for importers across the country's key markets.

Tuna

Atunlo, Spain's largest tuna seller has reportedly failed to meet requirements for avoiding liquidation.

Fishmeal, Fishoil

Global fishmeal and fish oil production started strongly in 2025, with January fishmeal output up 75% YoY, largely driven by a 300% increase in Peru. Other contributing nations included Chile, the U.S., Spain and parts of Africa. Fish oil production rose 71%, with Northern Europe being the exception. Meanwhile, China's aquafeed production and sales declined in 2024 due to bad weather, weak farm-gate prices and cost-cutting, forcing reliance on frozen fish and imports until the next fishing season in September 2025.

Animal Food

Pet-food RASFF Alerts & Recalls

Three cats in New York City were infected with H5N1 bird flu, linked to Savage Cat Food raw poultry (lot #11152026). Two of the cats died, while the third survived. Savage Pet has issued a recall for its raw chicken cat food due to potential bird flu (H5N1) contamination. This recall follows a similar action by Wild Coast LLC, which recalled its frozen raw chicken cat food in Washington and Oregon due to bird flu concerns. The American Veterinary Medical Association had previously warned about the risk of bird flu spreading

to cats.

RASSF Alert: CBD found in Pet food supplement from Spain.

General

Modern Slavery & Human Rights

A recent lawsuit against Bumble Bee Foods by four Indonesian fishermen highlights severe forced labour abuses in the tuna industry, including violence, debt bondage and hazardous conditions aboard distant-water fishing vessels. The lawsuit also exposed flaws in fishery improvement projects (FIPs) and Marine Stewardship Council (MSC) certifications with voluntary audits and certifications often proving ineffective in addressing worker exploitation. The ability of workers to contact unions and report abuses is seen as the key to combat forced labour. The "Wi-Fi NOW for Fishers Rights" campaign advocates free, accessible Wi-Fi on-board vessels.

Trade of illegal animal products

A study by Panthera, Sunway University and the Zoological Society of London (ZSL) has revealed that fishing vessels from Malaysia and Vietnam are involved in the illegal trade of Malayan tiger products, a critically endangered species with fewer than 150 individuals left in the wild. The research found that these vessels, facing declining profits, are turning to illegal activities such as trafficking wildlife, human trafficking, and child labour as alternative revenue sources.

New Innovation Hub

The UK Food Standards Agency (FSA) has received £1.4 million from the Department of Science, Innovation and Technology to establish a new innovation hub focused on regulating emerging food technologies, particularly precision fermentation which creates specific ingredients including proteins, sugars and fats. The hub aims to ensure food safety while streamlining regulatory processes for innovators and investors. It will enhance scientific risk assessments, provide clearer regulatory guidance and support industry growth.

Sustainability

The Soil Association has condemned Defra's decision to halt new applications for the Sustainable Farming Incentive (SFI) scheme, warning it threatens England's organic sector and smaller farms. Organic farming had been expanding, with 2024

seeing a doubling of land in conversion and continued growth in organic food sales. Soil Association chief executive, Helen Browning, criticised the decision, stating it risks the viability of domestic sustainable food production, forcing the UK to rely on imports while lagging behind Scotland and other nations with organic growth targets. The association is urging Defra to maintain payments for organic conversion and maintenance, honour pending applications, prioritise support for small producers and retain agroforestry payments.

EU Legislation

On March 14, EU countries approved a mandate to begin negotiations on deregulating new genomic techniques (NGTs), bringing genetically modified (GM) crops closer to market with fewer restrictions. A qualified majority of EU ambassadors backed the move after over a decade of lobbying by biotech industry groups.

USA

On March 6th 2025, after only 3 days in force the U.S. postponed the 25% import tariffs on Mexican goods, including agricultural products, until April 2, providing temporary relief to Mexican fruit and vegetable companies.

The U.S. Department of Agriculture (USDA) has terminated two key food safety advisory committees: the National Advisory Committee on Microbiological Criteria for Foods and the National Advisory Committee on Meat and Poultry Inspection. These committees provided expert, impartial advice on food safety, including microbiological issues and meat and poultry inspection policies. Their elimination has raised concerns for the future of food safety priorities at the USDA.

Ecuador

Ecuador has announced a partnership with Erik Prince, founder of the controversial U.S. private defence firm Blackwater, to fight organised crime and illegal, unreported and unregulated (IUU) fishing. The country's shrimp industry, worth \$6 billion, has been heavily impacted by criminal activities. Blackwater was linked to the 2007 Nisour Square massacre in Iraq, sparking criticism over the partnership. The move highlights Ecuador's urgency in tackling crime but raises concerns about the implications of involving a controversial defence contractor.



Global Shipping

The U.S. Federal Maritime Commission has launched an investigation into transit constraints at key global maritime chokepoints, examining the impact of foreign governments, regulations and vessel operators on shipping conditions. The investigation focuses on major shipping routes, including the English Channel, Malacca Strait, Northern Sea Passage, Panama Canal and Suez Canal. If countries are found responsible for creating unfavourable conditions, the U.S. may bar ships registered in those nations from entering its ports. This move aligns with broader shifts in U.S. trade policy under the Trump administration which has already introduced tariffs and restrictions on Chinese-built ships. The uncertainty surrounding these policies has created instability in global shipping markets, with analysts struggling to predict future supply-demand balances.

Hong Kong

The Hong Kong government is being urged to address traceability weaknesses in its seafood import regulations. There are calls for better data collection, such as species names, catch location and digital traceability standards aligned with international best practices. It also advocates for adapting the FAO39 seafood transshipment monitoring code.

EUDR

The EC has released a ['Myth Busters'](#) guide to clarify common misconceptions about the EUDR and explain its practical implementation. This resource seeks to dispel misinformation and ease unnecessary concerns among stakeholders.

Packaging

An updated version of the open-access FCCmigex Database (Version 3) has been released, providing the latest data on over 5,200 food contact chemicals, including substances that migrate into food from packaging and materials. The database now includes findings from 1,500 scientific studies, an increase of 20% from the previous version, and contains over 35,500 entries. The database is designed to support risk assessments, regulatory efforts, and the identification of safer food packaging materials.

A trend towards untargeted chemical analyses is emerging, aiming to identify all chemicals that may migrate from packaging into food, enhancing understanding of chemical mixtures.

Cell Cultivated Products

The UK Food Standards Agency (FSA) has launched its Cell-Cultivated Products (CCPs) sandbox program, selecting eight companies to participate. Funded by £1.6 million from the Government's Engineering Biology Sandbox Fund, the two-year program aims to gather scientific evidence about CCPs to inform regulations and ensure their safety before they reach consumers. The FSA plans to complete safety assessments for two CCPs and provide clearer guidance to businesses regarding CCP regulations.

USAID Funding

The freeze on USAID funding has significantly disrupted aquaculture programs in Africa, including one of the continent's largest foreign-supported projects. The Feed the Future Innovation Lab for Fish, which is managed by Mississippi State University, received a stop-work order, halting key initiatives that supported sustainable aquaculture and fisheries in Kenya, Nigeria and Zambia. These programs focused on improving fish

farming practices, boosting productivity and enhancing food security. The funding pause threatens the progress made in addressing food security and improving livelihoods through aquatic foods in the region.

Tuna Transparency Pledge

The Tuna Transparency Pledge, launched by The Nature Conservancy (TNC) in 2024, aims to achieve 100% observer coverage on tuna-fishing vessels by 2027, enhancing both monitoring and traceability in tuna fisheries, as well as ensuring a long-term, sustainable tuna supply. The pledge calls for signatories to commit to enhancing transparency throughout their tuna supply chains, ensuring that the tuna can be traced from catch to consumer.

'Routes to Regen'

A group of major companies, including McDonald's, McCain, Lloyds Bank and Waitrose, have launched the 'Routes to Regen' pilot project in the UK to promote regenerative farming. The project, set to aim to make regenerative farming more attractive to UK farmers by offering cross-sector support. The initiative is part of the Sustainable Markets Initiative (SMI) and aims to serve as a model for global regenerative farming efforts.

Launch of new Anti-Corruption Task Force in US

The Alliance for a Healthier America (AHA!) has launched a new Anti-Corruption Task Force aimed at combating food fraud and corruption within the U.S. food system. The initiative seeks to expose misleading practices, regulatory failures and the influence of lobbying groups that undermine food safety and quality.

The first report will address ingredient substitution and deceptive 'natural' claims in grocery products.

Exciting News: Knowledge Base Analytics has Launched!

We're thrilled to announce the launch of Knowledge Base Analytics—a powerful new tool designed to transform the way you analyse risk and performance data.

With Knowledge Base Analytics, you can:

- **Manipulate, compare, and trend data** for deeper insights.
- **Interrogate risk factors** with ease.
- **Generate reports in seconds** using the built-in reporting function.
- **Visualize trends** with dynamic graphs and charts.
- **Access key risk indices** such as the Modern Slavery Index, Corruption Index, and Environmental Performance Index.



Whether you need risk reports by category, country, product, or specific threats, Knowledge Base Analytics makes data work for you—unlocking valuable insights at your fingertips. **Making Data Add Value.**

Stay ahead of risks—start leveraging Knowledge Base Analytics this month!. [Contact us](#) to arrange a demonstration.



IN THE NEWS: March

Dairy

In India, the Food and Drug Control Administration (FDCA) seized 1,400 kg of adulterated paneer. They uncovered unhygienic conditions and the use of harmful chemicals and unapproved ingredients including glycerol monostearate powder, skimmed milk powder and palm oil in the production of the paneer. This case adds to growing concerns over paneer adulteration in India, with other incidents reported where chemicals such as detergents and non-edible starches were found in paneer products.

Meat

Authorities in Northern Ireland have seized 600kg of illegal meat smuggled into the country via the Stranraer ferry, raising concerns about weaknesses in UK border biosecurity. The meat passed through at least two UK ports before being intercepted at Larne. Industry officials question why previous checkpoints failed to stop the illegal shipment, highlighting gaps in border controls, particularly at Dover.

With recent disease outbreaks in Europe, including foot and mouth in Germany, experts warn of the increased risks posed by illegal meat smuggling. The British Meat Processors Association (BMPA) has also expressed concern over the rise of criminal networks distributing illegal meat across the UK. A DAERA spokesperson confirmed the meat was deemed non-compliant with sanitary regulations and denied entry to Northern Ireland.

A fake trucking company made off with 80,000 pounds of beef from a slaughterhouse in northeastern Tennessee. The theft was reported when two customers reported they had not received their shipments.

Seafood

USA based animal research company Dalan Animal Health has pioneered a novel vaccination technique for shrimp, previously thought impossible due to their lack of an adaptive immune system. The approach involves vaccinating female broodstock, which then pass immunity to their offspring. The technique was first tested successfully on honeybees, leading to a USDA-approved vaccine for American Foulbrood. It is hope the vaccine

will prevent diseases such as white spot and early mortality syndrome (EMS). If widely implemented, it could revolutionise disease management in aquaculture, improving shrimp survival rates and securing global seafood supplies.

Undersized lobsters seized in New York from Beyer.

Peppers

German authorities have withdrawn a consignment of Moroccan peppers due to excessive pesticide residues. The peppers were imported through Spain. Abamectin is a toxic insecticide that can cause severe health symptoms, including nervous system depression, vomiting, tremors, and even death in high doses.

Honey

In Punjab, Haryana and Rajasthan beekeepers are protesting against the National Beekeepers Board (NBB) for failing to address the issue of adulteration of mustard honey by food businesses and not testing honey using advanced techniques such as NMR and HRMS. The widespread adulteration of honey with low-cost sugar and corn syrups has reduced demand and prices for mustard honey, putting the beekeepers livelihoods and reputation of the country's honey industry at risk.

Jaggery

Jaggery, an unrefined sugar product popular in Asia and Africa, has been found to contain contaminants such as washing soda, chalk powder and metanil yellow (toxic colourant not permitted for use in food). The adulterated product was being sold in a market in India but jaggery is available to buy in the UK, particularly from online marketplaces which highlights the need for food safety regulation and testing.

Herbs and Spices

The Punjab Food Authority (PFA) discarded three maunds (approximately 112kg) of adulterated red chillies on March 13, 2025. The chillies had been mixed with artificial red dye, making them unsafe for consumption.

A major food fraud operation in Peshawar, seized 3,000 kg of adulterated spices mixed with bran and non-food-grade colouring agents.

UK Pesticides National Action Plan

The UK government has published the long-awaited Pesticides National Action Plan (NAP). The plan focuses on three main areas: promoting Integrated Pest Management (IPM) and alternatives to reduce pesticide reliance, setting targets for reducing pesticide risks and ensuring safe handling, storage and disposal of pesticides. The NAP includes a target to reduce pesticide use in arable farming by at least 10% by 2030, based on 2018 data.

Whisky Barrel Investment Fraud

A whisky barrel investment scam has defrauded victims of millions, exploiting a lack of regulation in the market. Fraudsters sold non-existent or overpriced casks, often reselling the same cask multiple times. The scam was orchestrated by convicted fraudsters operating under false identities. Authorities are investigating, but many victims face lengthy battles to recover their losses. The case highlights the risks of food and beverage fraud, where unchecked markets allow scammers to exploit investors with misleading claims.

Export Control

A Thai Agriculture Department Director-General allegedly accepted bribes in connection with testing for the illegal dye Basic Yellow 2 (BY2) in durians intended for export.

A multinational operation has dismantled a major drug trafficking network that smuggled cocaine from Peru to Valencia hidden among onion shipments.

These cases underscore the need for strict vigilance when importing food. Ensuring testing, transparency and regulatory compliance is essential to prevent food fraud and maintain consumer safety in global trade.

Fraudulent Certificates

The Soil Association have once again identified the use of fraudulent certificates. The certificates falsely claim the products to be organically certified. It is imperative you verify your suppliers certification via on-line resources and do not rely on paper or emailed certificates.

More information on all of the articles in this Newsletter is available in the Knowledge Base/ESG Knowledge Base. For customer support, please get in touch with barry.hilton@foodforensics.co.uk or info@foodforensics.co.uk





FOOD SAFETY: March

Country No of Alerts

France	103
United States	62
Turkey	36
Belgium	36
Canada	32
Germany	32
China	27
India	24
United Kingdom	23
Poland	23
Egypt	22
Netherlands	20
Italy	18
Spain	12
Czechia	11
Luxembourg	10
Denmark	9
Switzerland	8
Pakistan	8
Norway	7
Argentina	7
Brazil	7
Iceland	6
Thailand	6
Australia	6
Russia	5
New Zealand	5
Ecuador	5
Chile	5
Nigeria	4
Romania	4
Finland	4
Peru	4
Lithuania	4
Sri Lanka	4
Kenya	4
Sudan	4
Sweden	4
Vietnam	4
Ukraine	3
Bulgaria	3
Algeria	3
Iran	3
Morocco	3
Syria	3
Hong Kong	3
Hungary	3
Ireland	3
Latvia	3
Slovenia	2
Bangladesh	2
South Korea	2
Uzbekistan	2
Portugal	2
Madagascar	2
Bosnia and Herzegovina	2
Venezuela	2
Nepal	2
Uruguay	2
Colombia	2
Mauritania	1
Croatia	1
Japan	1
Serbia	1
El Salvador	1
Uganda	1
Mauritius	1
Afghanistan	1
Estonia	1
Azerbaijan	1
Albania	1
Greece	1
Belarus	1
Nicaragua	1
Greenland	1
Georgia	1
Senegal	1
Tunisia	1
Taiwan	1
Indonesia	1
Slovakia	1
Austria	1

SUMMARY

There were **648 Red**, **30 Amber** and **11 Green** for a total of **689 safety alerts and product recalls*** in March.

The majority of alerts were for bacterial pathogens and pesticides (24.6% and 17.7% respectively). Allergens were third with 14.4%.

170 Bacterial pathogen alerts (59% Salmonella, 25% Listeria); E.coli accounted for 9.4% of which 63 % were STEC.

122 Pesticide alerts (25% Chlorpyrifos, 6% Acetamidrid, 2% Thiamethoxam)

Top 3 alerts by commodity

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

Top 3 number of alerts by county of origin

- France:** Molluscs; pate; pork.
- USA:** Nuts & seeds; snacking; vegetables.
- Turkey:** Dried fruit; fruit; herbs & spices.

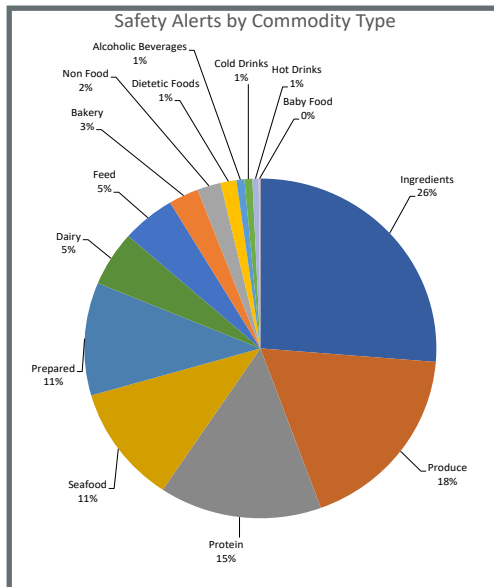
*Safety alerts & product recalls compiled from RASFF, FDA, AFSCA,CFIA, Rappel Consommateur, potraviny na prany, SFA, CFS, MPI, FSAI & Food Standards AU

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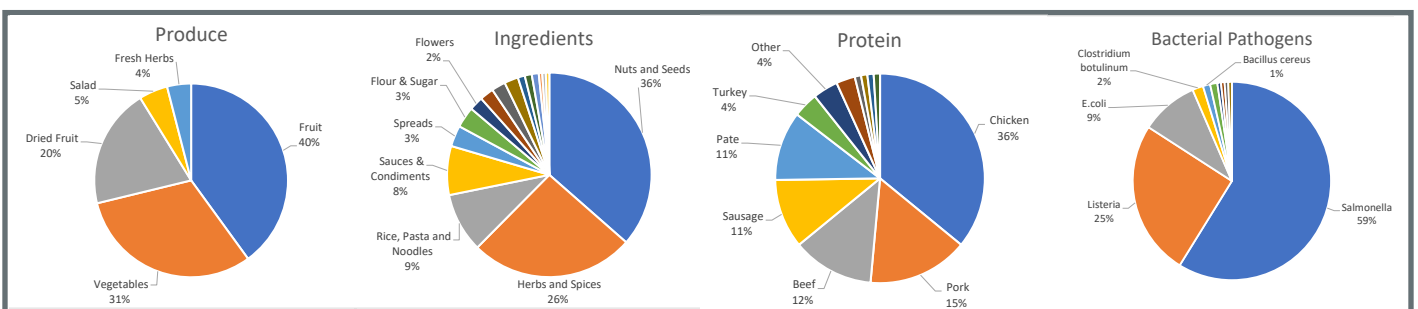
Food Forensics Ltd

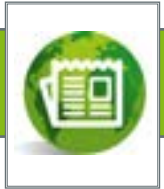
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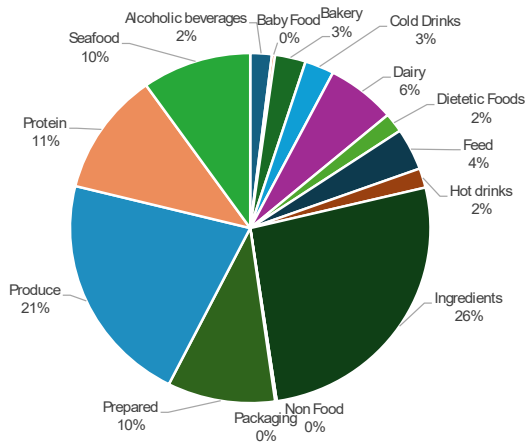
Total 689



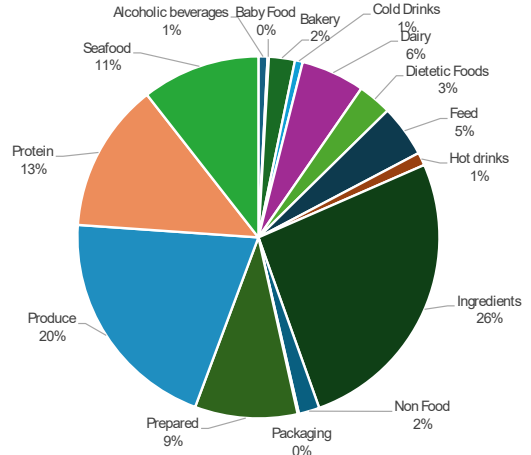


Knowledge Base Trends

Product Category Issues March 2024

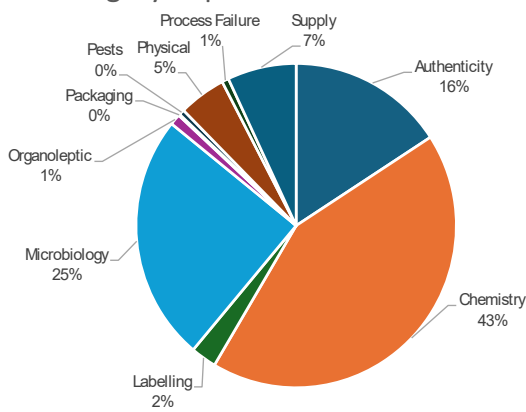


Product Category Issues March 2025

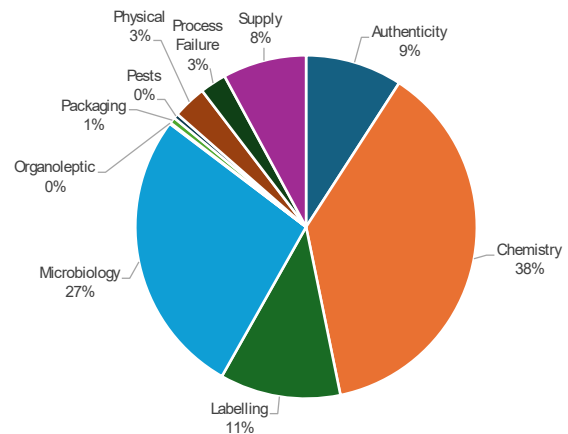


Slight decreases in prepared, produce and protein this month but on the whole a similar pattern to last year.

Category Reported Issues March 2024

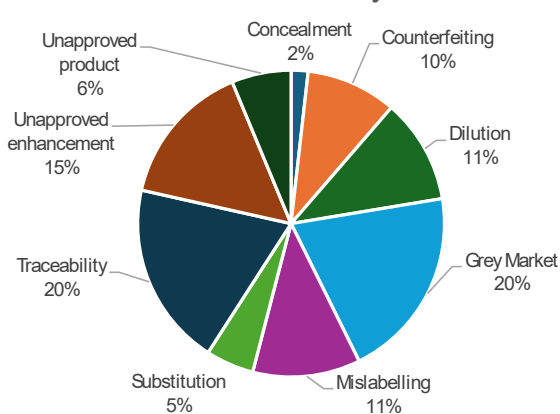


Category Reported Issues March 2025

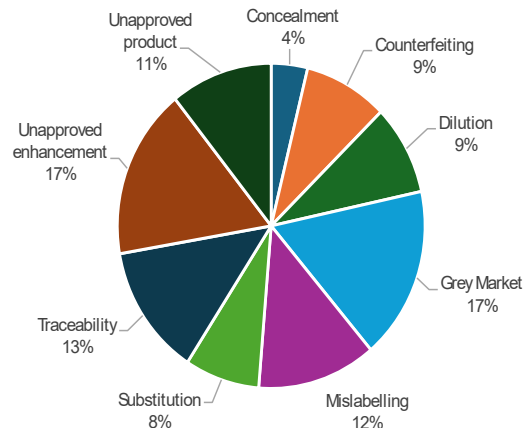


As we saw last month, increases in issues attributed to labelling dominate, proportionally, chemistry, authenticity and microbiology have increased.

Q1 2024 Authenticity Issues



Q1 2025 Authenticity Issues



There have been a higher percentage of substitutions and unapproved products in Q1 2025 compared to Q1 2024. Traceability issues in Q1 2025 are reduced compared to the same period last year.

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