










Risk Newsletter

Food Forensics

March 2025



HIGHLIGHTS

-  Citrus greening disease continues to blight citrus production.
-  Agriculture in Morocco faces continuing challenges due to drought.
-  Peste de petit ruminants, blue tongue virus and avian influenza continue to impact the food industry.
-  Turkish honey fraud concerns.
-  Low yields of Assam tea increase risk of food fraud.
-  EU sunflower seed harvest is the lowest since 2015.
-  Russian wheat supplies decline as growers turn towards more profitable crops including sunflower and soyabean.

Produce

Citrus

Fluctuating orange prices across Europe are fueling concerns over food fraud, particularly mislabelling, dilution, and origin misrepresentation. Italy's consistently high prices make its oranges a prime target for substitution with cheaper imports from Greece or Spain. Greece's sharp price drop from €61/100 kg in November to €50/100 kg in January increases the risk of adulteration to maintain profitability.

The 2024 citrus export season from the southern hemisphere fell short of growth expectations, largely due to South Africa's struggles with extreme weather, logistical disruptions, and stricter EU phytosanitary regulations. Lower demand from Asia and the U.S., combined with attractive juice industry prices, also diverted exports to processing. Chile's mandarin, clementine, and late variety exports fell by 21% due to weather, though lemon and orange shipments increased. Peru set export records, particularly for tangerines, while Argentina faced a lemon surplus, reducing fresh exports. Australia, too, saw lower exports to Asia due to climate challenges.

The USDA has cut Florida's 2024-2025 orange production forecast by 36% to 11.5 million boxes. Tunisia's citrus exports rose 41.4%, while Egypt is expected to

export 30% fewer oranges to Europe following last year's record crop. This smaller harvest will likely drive up prices and reduce exports. Meanwhile, Brazil's 2024/25 orange production is forecast to rise 5.4%, recovering from a historic low due to expected regular rains and cooler La Niña conditions.

In the U.S., lime supply is currently stable but expected to tighten by late February due to cold weather damage in Mexico, which provides 90% of U.S. limes. Colombia is increasingly supplementing supply, particularly on the East Coast.

Jamaica is experiencing record citrus prices amid a severe shortage caused by citrus greening disease and climate events. Once producing 5 million boxes annually, the country now yields just 1.1 million. Citrus greening continues to devastate production worldwide, affecting the U.S., Brazil, parts of Asia, and the Caribbean, with Jamaica particularly hard-hit.

Top fruit

On February 25, Moldova announced that India has fully opened its market to Moldovan apples, provided exporters meet phytosanitary standards, including mandatory cold treatment. Certification is handled by Moldova's National Food Safety Agency. The country produced around 450,000 tons of apples in 2024, with orchards spanning over 50,000

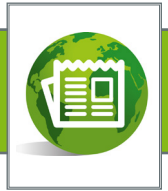
hectares.

Meanwhile, a new company, Mela Veneta srl, has been established to promote the 'Mela di Verona' apple brand, which is undergoing PGI recognition. With over 1,000 hectares dedicated to apple production, the company expects an annual yield of 42,000 tons, including Granny Smith, Gala, and Golden varieties.

The World Apple and Pear Association (WAPA) forecasts a 5.5% rise in Southern Hemisphere apple production for 2025, reaching 4.75 million tonnes. South Africa, Brazil, Chile, New Zealand, Argentina, and Australia are the key contributors, with South Africa remaining the largest producer. Gala, the most popular variety, is expected to grow by 6.8%. Exports are set to increase by 5.3%, led by South Africa and Chile.

In contrast, pear production is expected to decline by 3.3%, with Argentina, the largest producer, facing a 10.9% drop, while South Africa, Chile, and Australia see modest gains. Pear exports are predicted to fall by 4.4%.

The EU's 2024 apple production forecast has been lowered to 10.39 million tonnes, a 9.7% drop from 2023, while pear production is set to rise by 5.1%. In the U.S., apple production is expected to decline by 2.3%, and pear production has fallen sharply by 21.5%.



Persistent rainfall in Flanders is raising concerns over pear quality, as excessive moisture threatens tree health and future harvests. Prolonged exposure could lead to root rot, oxygen deficiency, and fungal infections like pseudomonas, which caused a 50% crop loss last year. If wet conditions persist, lower yields could increase the risk of mislabelling or fraudulent sales of pears from other regions as local produce.

Soft fruit

Strawberry harvesting in Santa Maria, California, has been minimal due to recent rains affecting fruit quality, raising concerns about bruising and pin rot. To meet demand, growers are supplementing with Mexican strawberries, but full capacity is expected to resume. The short supply and quality issues increase the risk of food fraud, as substandard or imported fruit may be used to meet demand, compromising authenticity and standards.

Mexico's blueberry production is projected to decline by 9% in 2025 due to a shorter harvest period. This adjustment responds to competition from Peru and Chile, which offer similar-quality berries at lower prices. To maximise revenue, Mexican producers have delayed their harvest to coincide with South America's seasonal slowdown. Despite the reduction, Mexico remains a top global blueberry producer, benefiting from favorable growing conditions, proximity to the U.S., and advanced production techniques.

In Spain's Huelva region, water restrictions limiting irrigation by 25% are forcing growers to rethink their crops. Some have abandoned strawberries in favor of blueberries, which require less water and are more profitable under current conditions.

Meanwhile, cooler temperatures in northern Morocco have delayed the ripening of soft fruits, pushing expected blueberry harvests from January-February to March. Moroccan blueberries face price competition from Latin American exports but have a logistical advantage, reaching Spain in a day and Germany or the Netherlands in four days, far faster than shipments from Latin America.

The growing shift to organic blueberry production heightens the risk of food fraud through mislabelling and counterfeit organic claims. As competition from

imports rises, ensuring the authenticity of organic certification is crucial to maintaining consumer trust and premium pricing.

Grapes

Nigeria is positioning Kaduna State as a major grape farming hub, providing farmers with seedlings, mechanisation, training, and other support to boost yields. Kudan Local Government Area already accounts for 85% of the country's grape production due to its favorable climate and soil. The country aims to rank among the world's top 10 grape producers.

Namibian grape shipments through Walvis Bay have nearly doubled this season, driven by logistical challenges at South African ports. While the greater distance from farms to Walvis Bay increases landside costs, the port's efficiency has reduced delays and improved fruit freshness. This season, 40% of Namibia's grape exports were shipped via Walvis Bay.

In California, the 2024 grape harvest was one of the smallest in two decades, totaling 2.84 million tons—a 23% drop from last year. Extreme heat, including a late-season heatwave, and cautious buyer spending led to unharvested grapes. Despite the decline, the reduced supply is expected to help rebalance the wine market by addressing oversupply. The average price per ton fell nearly 5%, though some varieties, like Cabernet Sauvignon, saw increases. This smaller harvest is seen as essential for long-term industry stability.

Australia's grape harvest has begun on a positive note, with strong yields despite some hot weather spikes. Varieties such as Sweet Globe, Ivory, Thompson, and Crimson are being harvested, with sugar levels (brix) at record highs, promising a superior eating experience for consumers.

Stone Fruit

Farmers in Nyandarua County, Kenya, are struggling with plum crop failures, likely due to climate change. Excessive rainfall and cold temperatures have caused a 20% annual decline in harvests over three years, devastating an industry that once supported 5,000 farmers and generated \$1.1 million annually. In response, many are shifting to alternative crops, with avocados thriving in the warmer climate. Pear, cherry, and apple trees are also at risk, though

apples show promise due to their resilience and improved farming techniques.

Avocado

Mexico's avocado industry faces uncertainty as a potential 25% U.S. tariff on imports could drive up prices. This extends to all Mexican fruits and vegetables, which make up a significant share of the U.S. supply. While the Mexican government is in talks to resolve the issue, no solution has been reached.

In the Canary Islands, Storm Dorothea devastated up to 48% of avocado production on December 15, shortening the season and limiting exports despite strong European demand, particularly from Switzerland. The islands, which typically export only 15-20% of their crop, are also pursuing Protected Geographical Indication (PGI) status for "Aguacate de Canarias" to certify its quality and distinguish it in the European market.

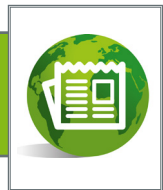
Kenya's avocado season began on February 14 with green-skinned varieties, followed by Hass. Climate disruptions have delayed the Hass peak by a month, shifting it from March to April. Despite this, quality remains high, and demand from Europe, the Middle East, and the Far East is strong. To address climate challenges and the Red Sea crisis, Kenyan growers are expanding avocado acreage from 30,000 to 34,000 hectares and adopting technologies to improve quality and delay ripening.

Mango

Mango farmers in Cambodia, particularly in Oddar Meanchey province, face rising pest threats, including mealybugs, thrips, flower webworms, and mango gall midge. An FAO study warns that these pests could disrupt flowering in February, while soil moisture deficits may slow growth. Although most mango trees are in the vegetative stage, some off-season varieties are already flowering, with harvests expected in March. Farmers are advised to manage flowering carefully and consider pruning to optimize yields for a higher-priced peak harvest later in the year.

Melons

Morocco's watermelon production is shrinking due to drought and government restrictions, with key regions like Zagora and Taroudant seeing reduced acreage



and bans in Errachidia and Tinghir. Some producers have shifted cultivation to Mauritania, but early-season exports face weak European demand due to cold weather. The decline in domestic production and increased reliance on foreign supply chains heighten the risk of food fraud, emphasising the need for stricter oversight.

Senegal's melon and watermelon production is down due to temperature fluctuations affecting fruit setting and yields. Early-season fruits will be smaller, though quality is expected to improve later. Reduced acreage has further limited output.

In Central America, heavy rainfall has lowered watermelon supply, creating challenges in meeting high European demand, especially with Ramadan approaching.

Bananas

Peruvian fresh banana exports had a difficult start in 2025, with January shipments down 14% in volume and 17% in value. The decline was driven by lower output and a 3% price drop per kilogram. Competition with Ecuador remains tough, as Ecuador is unaffected by the *Fusarium Tropical Race 4* pest, which has restricted Peruvian banana production since 2021. The Netherlands was Peru's top banana importer, followed by the U.S., Belgium, Panama, and Italy.

Ecuador's banana exports have been hit by the Red Sea logistics crisis, causing higher transport costs and supply chain disruptions. Rerouting shipments via southern Africa initially raised freight rates by \$3,000 per container, increasing risks of food fraud, such as mislabeling or mixing lower-grade fruit to meet commitments. Stricter agrochemical regulations in the EU and Asia also challenge Ecuadorian growers, with non-compliance potentially leading to fraudulent pesticide declarations.

In Australia, flooding in North Queensland has caused a banana shortage, driving up prices and raising concerns over counterfeit or mislabelled imports being sold as premium Australian-grown produce.

Exotics

Zespri is ramping up efforts to combat food fraud after counterfeit 'Zhouzhi'

kiwifruit, mimicking its branding, was found in Indonesian supermarkets. The fraudulent label, originating from China, has appeared in multiple markets, including China itself.

Meanwhile, Guangdong, China, is facing a historic lychee shortage in 2024, with yields down 50% due to extreme weather. An unusually hot winter in 2023, followed by heavy rainfall and storms, severely affected flowering and fruiting in the province, which produces over half of China's lychees.

Tomatoes & Peppers

The World Processing Tomato Council (WPTC) forecasts a sharp 11.5% drop in global processing tomato production for 2025. Major declines in California (-7%) and China (-42%) raise concerns about food fraud, including mislabeling, adulteration, and counterfeit products in the processed tomato market.

As European tomato production struggles, Uzbekistan is emerging as an alternative supplier. With an ideal climate for cultivation, it produces high-quality varieties like Pink Paradise, currently exported to Russia. Amid shifting global dynamics, Uzbekistan aims to enter European markets, supported by government initiatives despite water and energy challenges.

In Morocco, an eight-week cold and cloudy spell has affected tomato and pepper availability, but improving weather is expected to accelerate ripening ahead of increased Ramadan demand. Meanwhile, low UK light levels have delayed summer tomato and pepper crops by 1–2 weeks, though they may recover if conditions improve.

Cucumber

Kultive has strengthened its position as France's top cucumber producer by acquiring Marchal Greenhouses, a key player in the Grand-Est region. Completed in December 2024, the acquisition adds 11.5 hectares of greenhouses, boosting Kultive's projected sales to 30,000 tons in 2025. The company aims to preserve the regional identity of its products under the 'Lorraine production' label. This season is set for a strong start, with early arrivals of French cucumbers meeting demand, especially as Spanish supply remains limited.

Lettuce

The growing demand for Canadian organic lettuce amid U.S. tariffs raises concerns about food fraud, as some producers may mislabel imports as Canadian-grown. Greenbelt Organic Greens has seen a 30% sales surge, particularly for its Ontario-branded mixes, highlighting the need for strict origin labelling. To meet demand, Greenbelt has expanded organic soil-based production, but scaling up increases risks of misrepresentation. As the company re-enters the microgreens market with broccoli, arugula (rocket), and pea seedlings, maintaining authenticity in organic certification will be crucial to preserving consumer trust.

Potatoes

Incorrect harvest forecasts disrupted Germany's potato market, creating confusion and financial strain on producers. Overestimated yields, possibly due to neglecting the organic sector, led to an unclear market, though stored domestic potatoes remain stable.

In Brazil, excessive rainfall in early 2025 severely impacted potato production, delaying harvests and increasing disease risks, raising concerns about food fraud.

Bangladesh's record-high potato cultivation has caused an oversupply, forcing farmers to sell below production costs. Poor storage infrastructure and rising input costs further strain profitability.

In the U.S., inflation and climate change are driving up potato chip prices, with lower yields in key states like Idaho and Pennsylvania increasing reliance on alternative sources. This raises food fraud risks, including mislabelling and counterfeit ingredients.

Chicory

An oversupply of chicory roots has led to falling prices, with cold storage at capacity and the summer harvest posing further risks to quality and pricing. While chicory is increasingly seen as a luxury item internationally, year-round cultivation in Belgium, the Netherlands, France, and Germany protects it from import competition. Grower-trader collaboration remains crucial for market stability.

Asparagus

The Dutch white asparagus season has begun with limited initial supply, offering



only AAA and AA grades in moderate quantities. Green asparagus will be available in the coming weeks.

Mushrooms

A wild mushroom shortage in Northern California and Oregon, caused by unseasonably cold weather, has driven prices up fourfold and raised concerns about food fraud. Limited availability of Black Trumpets, Yellowfoot Chanterelles, and Hedgehog mushrooms has led to increased imports from Portugal and Spain, heightening risks of fraudulent labeling. To offset fresh shortages, Ponderosa is offering frozen and dried wild mushrooms, increasing the potential for misidentified or lower-quality products entering the market.

Ginger

The Peruvian ginger industry faces declining yields and quality issues due to diseases like *Erwinia* and *Ralstonia*. Concerns grow over deforestation linked to ginger farming.

In Nigeria, ginger farmers struggle with fungal infections, rising costs, and a lack of disease-resistant seeds. Despite a 6 billion Naira intervention in 2024, production costs have soared, making Nigerian ginger uncompetitive.

Garlic

Egypt has significantly increased its garlic exports to Italy up 84% from the previous year. Exports now extend until November, boosting Egypt's market share from under 3% in 2022 to over 6% in 2024, surpassing Slovenia and Argentina.

Coconut

Sri Lanka's coconut production has fallen from 3.35 billion nuts in 2022 to 2.68 billion in 2024, failing to meet domestic and export demand. With 15% of coconut palms past their economic lifespan, productivity has declined. Critics argue the crisis could have been mitigated with better planning, grower support, and access to quality seedlings. Revitalizing the industry requires government financial backing, improved fertilisation, and solutions for drought, pests, and wildlife damage.

Sunflower seeds

The EU Commission lowered its 2024 sunflower seed production forecast to 8 million tonnes, the smallest harvest since 2015 and an 18% drop from 2023.

Weather-related declines hit Germany (-25% to 127,000 tonnes) and Romania (-38% to 1.2 million tonnes). Hungary became the EU's top producer with 1.7 million tonnes (-13%), followed by France, also at 1.7 million tonnes (-18%).

Spices

In India's Khammam district, a black thrips infestation is damaging up to 50% of chilli crops, causing leaf curling, flower drops, and malformed fruits. Farmers face financial strain due to pesticide failures and falling prices. The pest emerged after the 2024 cotton harvest, and researchers are investigating the outbreak.

Nuts

Australia's 2025 almond crop is estimated at 155,531 tons, down 5% from initial forecasts due to September frost damage. Prices are at a five-year high, and dry conditions are supporting high-quality yields.

In Kenya, MACNUT supports the ban on raw macadamia exports, countering NUTAK's concerns. The ban aims to protect local processors, prevent underreported exports, and combat food fraud, ensuring fair farmer compensation and sustainability.

Wheat

France's soft wheat crops remain near last year's four-year low due to heavy winter rainfall, delaying plantings and stunting growth. With only 73% rated good or excellent, concerns over another weak harvest persist, potentially reducing exports by 30%. Winter barley quality has declined, while spring barley sowings lag behind the five-year average.

In Russia, wheat production may fall to 80.1 million tons in 2025, the lowest in three years, as farmers shift to more profitable crops. Rising costs and low prices increase food fraud risks, with potential mislabelling or adulteration in global wheat markets, making transparency and certification crucial.

Soya bean

The spring planting campaign in the Northern Hemisphere is gaining attention, with farmers adjusting crop choices based on weather and market conditions. Oilseed areas, especially soya beans, have expanded due to their price competitiveness with cereals, growing 3% annually over the past five years

compared to maize's 1% growth.

In the U.S., the USDA Agriculture Outlook Forum will release the first crop forecasts. With the soy-to-maize price ratio at a four-year low, farmers may favor maize, potentially impacting global feed grain prices.

In the UK, rising feed wheat futures could face pressure if higher U.S. maize plantings increase global supply.

Rapeseed

The EU Commission has lowered its 2024 rapeseed harvest forecast to 17.2 million tonnes, increasing the need for imports to meet the expected processing demand of 23 million tonnes. Germany, processing 10 million tonnes annually, is a key importer.

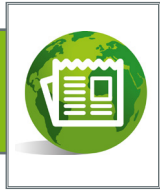
Ukraine remains the EU's top rapeseed supplier, accounting for 63% of imports, while Australia and Canada are gaining market share. By mid-January 2025, Australia had shipped 875,000 tonnes to the EU (up 19% year-on-year), and Canadian imports tripled to 144,000 tonnes, though EU restrictions limit their use in food production due to GM concerns. Most imports are directed toward biofuel production, with supply from Serbia and Moldova declining significantly.

Corn

Climate change is expected to increase insect pressure on crops, particularly the corn flea beetle, a major pest in the U.S. Warmer winters will allow larger beetle populations to thrive, expanding their range and increasing damage. The beetle also spreads Stewart's Wilt, a disease that reduces corn productivity. By mid-century, pest-related crop losses in the Corn Belt are projected to worsen, posing challenges for pest management and potentially affecting corn quality and authenticity.

Corn prices have shown signs of recovery in early 2025 following a difficult 2024, driven by tighter-than-expected supply, rising ethanol production, and increased exports. The USDA reported lower-than-expected corn carryover, contributing to the price rally. However, concerns over excessive producer selling and speculative trading suggest the recovery may be fragile.

To support smaller traders, the CME



Group is launching micro corn contracts (500 bushels, one-tenth of a standard contract). These contracts will lower capital requirements, provide better risk management options, and allow retail traders to participate with reduced margin costs.

Coffee

Arabica coffee prices hit a record high in February, driven by concerns over Brazil's coffee crop. Prolonged dry conditions in key growing regions have led to downward revisions in Brazil's 2025/26 crop estimates, with the 2024 harvest also revised lower. Reduced Brazilian coffee exports in 2024, alongside a drought-driven decline in Vietnam's robusta production, have fueled global supply fears.

Despite these concerns, rising global coffee inventories and a 5.8% increase in 2023/24 production, as reported by the International Coffee Organisation, may apply downward pressure on prices. However, long-term crop damage and potential supply deficits continue to support higher prices.

Cocoa

Cocoa prices are climbing as drought and harsh Harmattan winds reduce production in West Africa, particularly in Ivory Coast and Ghana. Although exports initially rose, shipments have slowed, causing global stockpiles to shrink, with U.S. port inventories at a 21-year low.

Tea

Assam's tea production has declined due to unpredictable weather, including heatwaves and floods during peak harvesting. India's overall tea production in 2024 dropped by 7.8%

Wine

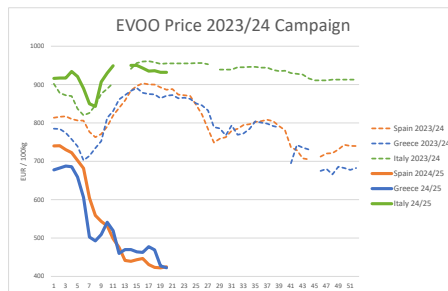
South Australia's wine industry has begun its earliest vintage on record due to a dry year, heatwaves, and frost. Harvesting started up to a month earlier than usual, with regions like the Riverland experiencing the earliest start in decades. While yields are lower due to frost damage and water shortages, winemakers are optimistic about the 2025 vintage, citing good fruit quality. Increased irrigation has been necessary to manage dry conditions, but overall, the early vintage presents opportunities for a strong wine year despite the challenges.

Vegetable oils

Malaysian palm oil futures rose driven by concerns over a 13-15% decline in production due to heavy rains and floods. However, limited demand from key importing countries prevented further price increases. Despite production challenges, weak buying interest may keep prices stable until more data emerges. The weakening Malaysian ringgit has also made palm oil more affordable for foreign buyers, potentially influencing future trade dynamics.

Olives & Olive Oils

Exports of Turkish olive oil and table olives have surged in the first two months of the season, positioning Turkey as the world's largest producer of table olives and the second-largest olive oil producer. However, this rapid growth raises concerns about food fraud and authenticity, particularly regarding mislabelling and adulteration. With significant export increases to Iraq, Germany, and the U.S., strict quality controls are essential to prevent counterfeiting. Meanwhile, declining EU imports suggest increased self-sufficiency.



Honey

Turkey, the world's second-largest honey producer, is grappling with widespread honey adulteration, threatening industry integrity and global reputation. Despite producing 115,000 tons annually, counterfeit honey mixed with sugar syrup is prevalent. Recent raids uncovered large quantities of fraudulent honey, with authorities identifying 43 producers involved in violations.

In California, record bee losses have intensified concerns about food fraud in honey production and pollination services. Hive theft has surged, with stolen colonies being rented for pollination or used for fraudulent honey production. With fewer bees, the risk of adulterated honey—mixed with syrups or falsely labeled—has increased. Beekeepers and authorities are

using tracking measures like air tags and hive markings, but enforcement remains a challenge.

Protein

African Swine Fever (ASF)

In Malaysia's Selangor state, approximately 76,000 pigs across 56 farms have tested positive for African Swine Fever (ASF). To control the outbreak, 1,868 pigs have already been euthanised, with the remaining 74,000 pigs set for disposal by March. The virus, initially detected in Sabah, has since spread to other states, including Perak and Penang, raising concerns over the impact on Malaysia's pork industry and biosecurity measures.

Avian Influenza (H5N1 AI)

Seven cats in Portland, Oregon, have tested positive for bird flu since December 2024, with most cases linked to contaminated raw chicken pet food from Wild Coast Raw. Two infected cats were euthanised, and authorities are increasing testing to monitor the disease's spread.

The U.S. government is shifting its response to avian influenza, moving towards vaccination and stronger biosecurity measures rather than culling infected poultry. A vaccine for avian influenza in chickens has been conditionally approved by the USDA. However, there are concerns about potential negative impact of vaccination on the export market for U.S. poultry products.

In Northern Ireland, The Department of Agriculture, Environment and Rural Affairs (DAERA) is investigating a suspected case of Avian Influenza at a commercial poultry farm near Pomeroy, Co Tyrone. Preliminary tests indicate highly pathogenic avian influenza (HPAI). This follows a recent confirmed case in Dungannon, Co Tyrone, highlighting the importance of strict biosecurity measures.

Peste des Petits Ruminants (PPR)

Following reports in last month's newsletter, the Dover Port Health Authority has issued an urgent notice prohibiting the import of certain sheep and goat commodities from Hungary into Great Britain (England, Scotland, and Wales) due to an outbreak of peste des petits ruminants. The ban applies to live animals, germplasm, raw milk and its products (including colostrum), untreated wool and



hair, as well as fresh or chilled untreated skins and hides.

Blue-tongue virus (BTV-3)

The 2025 "Battle Bluetongue" campaign in the UK urges farmers in England and Wales to consult vets about vaccinating against Bluetongue serotype 3 (BTV-3). With no treatment available, vaccination and movement restrictions are the best defenses. Led by the AHDB and RH&W, the campaign provides resources to help vets and farmers develop farm-specific prevention plans.

Foot and Mouth Disease

Extra checks at UK Port Health on imports from Germany are causing delays due to the ongoing ban on pigs, sheep, and cattle following a confirmed foot and mouth disease case. As a key supplier of sausages and processed pig meat to the UK, heightened vigilance is essential to prevent illegal imports.

Dairy

UK wholesale butter prices fell 4% this month, but tight stocks keep buyers focused on short-term needs, anticipating further declines by spring. Meanwhile, milk powder surpluses persist due to weak exports.

Beef

GB beef prices remain strong at 625p/kg in February 2025, up from 497p/kg last year. With GB and US prices double those of Brazil, the risk of substitution remains high.

Lamb & Goat

GB lamb prices have stabilised, now 4% higher than last year but still below the EU reference price. With falling EU production and steady demand, UK sheep meat exports could help fill the gap.

Chicken & Turkey

EU broiler prices have remained stable at up 7% from last year but slightly down from the previous month. In January, US prices surpassed EU levels at 283.61 eurocents/kg, while Brazilian prices remain much lower at 133.97 eurocents/kg. EU broiler production topped 900,000 tonnes in December 2024, achieving 108% self-sufficiency in poultry meat.

Egg Layer

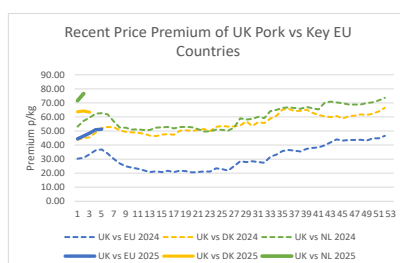
EU egg prices have declined in 2025 after peaking in December but remain 2% higher than last year. Production rose by

0.7% in 2023, led by France, Germany, Spain, Italy, and Poland. In 2024, EU egg exports increased by 11%, with the UK as the top importer, while imports surged 27%, mainly from Ukraine.

Pig Meat

Dover Port Authority warns that weak border controls and resource shortages leave the UK vulnerable to illegal imports. Pork from Romania, where ASF remains prevalent, and Germany, currently under an import ban for foot and mouth disease, are key concerns.

UK pork prices remain at a premium to EU origins, but currently imports are down.



Salmon

Mowi, the Norwegian salmon-farming company, is acquiring a 46% stake in Nova Sea, increasing its ownership to 95%. The deal, set to close in late 2025, will be 30% in Mowi shares and 70% cash, funded through existing credit lines.

Shrimp

Argentina's Chubut coastal shrimp fishery is set to receive MSC certification after a decade-long improvement process. Producing 60,000–90,000 metric tons annually (40% of the national total), the fishery has met sustainability standards through a fishery improvement program. Certification will allow shrimp from 32 vessels to carry the MSC blue label, with potential expansion to others in the future.

Fishmeal, Fishoil

Global fishmeal production rose 26% in 2024, driven by Peru's strong anchoveta season, which met 95% of its 2.51 million metric ton quota. This rebound followed a 23% drop in 2023 due to El Niño. Fish oil output grew 12%, though declines in Chile and Europe limited gains, with smaller increases in the U.S. and Africa having minimal impact.

Animal Food

Pet-food RASFF Alerts & Recalls

Consumer Reports tested 58 major dog food brands, finding most met nutrient guidelines but with some variations. A few samples contained harmful bacteria, including listeria. Additionally, Sana Pet Products' chews were detained over suspected Salmonella, and Salmonella was detected in buffalo meal from India used in pet food.

General

Modern Slavery & Human Rights

CNN's investigative series The Great Illusion exposes labor abuses in India's shrimp-processing industry, particularly in Andhra Pradesh. Migrant women and girls endure 12-hour shifts without overtime, earning below the legal minimum wage. Restricted to one monthly outing, workers face exploitative conditions, with recruiters incentivised to keep them on-site.

Sustainability

Skytop Springs, a sustainable fish farm in New York, has joined the 100 Percent Great Lakes Fish Pledge, committing to full utilisation of its fish by 2025. Led by the Great Lakes St. Lawrence Governors & Premiers (GSGP), the initiative reduces waste, boosts rural economies, and creates new markets for fish by-products in cosmetics, medicine, and supplements. Inspired by Iceland's success, the movement is gaining global traction.

EU Legislation

Regulation (EU) 2025/179 mandates whole genome sequencing (WGS) for five key foodborne pathogens starting August 23, 2026. Member States must use WGS in outbreak investigations and share data with EFSA, aligning with the One Health approach to improve traceability by linking food and human isolates.

EU-Mercosur Trade Deal

After 25 years of negotiations, the EU and Mercosur have reached a historic trade deal, including tariff reductions, quotas, and dispute resolution mechanisms. The agreement awaits ratification but faces opposition from agricultural groups in France and Poland. For EU and UK impact details, see the FF Knowledge Base.



Tebuconazole

Canada's PMRA is proposing to lower the maximum residue limit (MRL) for tebuconazole on grapes from 5.0 ppm to 0.1 ppm due to health concerns. If approved, this would apply to all grapes, including imports. With Canada accounting for 30% of U.S. grape exports, U.S. exporters may need to adjust practices to maintain market access.

Panama Canal

U.S. Secretary of State Marco Rubio's visit to Panama aligns with President Trump's efforts to regain control over the Panama Canal, a crucial route handling 40% of U.S. container traffic, including key food exports. Concerns over China's growing influence in Panama's ports could impact global food trade and security if foreign control over the canal expands.

EUDR

Major coffee companies and industry groups are pushing back against the EU Deforestation Regulation (EUDR), which targets deforestation and human rights abuses. Initially approved in 2023, the EUDR's enforcement was delayed until 2025 due to industry lobbying. Coffee, a major driver of deforestation in Brazil, Vietnam, and Indonesia, ranks as the sixth-highest deforestation risk commodity. The sector also faces scrutiny over human rights violations, including child labour and extreme poverty. Critics argue the industry should focus on compliance rather than lobbying to weaken the regulation.

USA

On February 7, 2025, the U.S. restricted funding to South Africa over its Expropriation Act, which allows land seizures without compensation. This threatens South Africa's citrus exports and could lead to its removal from AGOA, jeopardising billions in trade and

thousands of jobs.

Meanwhile, on February 1, Donald Trump imposed tariffs under the IEEPA, citing the threat of illegal drugs. Canadian and Mexican goods face a 25% tariff (excluding Canadian energy), while Chinese goods face 10%. Similar to the 2018 trade war, these tariffs could disrupt food imports and exports, increasing risks of food fraud and authenticity issues.

Pakistan

Pakistan is experiencing a severe 70% winter rainfall deficit, endangering agricultural yields and driving up food prices. The drought is causing water shortages and harming key crops, with wheat production expected to drop by 30-35% and sugarcane by 50%. Citrus output has already fallen by 35%. Experts warn that climate change, poor government policies, and rapid urbanisation are exacerbating the crisis, posing long-term threats to the agricultural sector.

Weather

Record-breaking snowfall in Hirosaki City, Japan, has severely damaged apple orchards, threatening fruit quality and authenticity. Heavy, wet snow has caused widespread branch breakage and trunk splitting, especially in older orchards. Some growers report losses of up to 20% of trees, which could delay flower bud development and affect future harvests.

The current La Nina conditions are expected to move to ENSO neutral during March to May.

Norway seafood exports

Norway's seafood exports hit a record NOK 15.3 billion in January 2025, up 14% year-on-year, driven by higher salmon volumes and strong wild-caught species sales. The U.S. was the top market, importing a record amount of Norwegian

salmon and king crab, benefiting from Russia's seafood ban and its own fishery recovery. China ranked as the second-largest market.

Yellowfin Tuna

The Indian Ocean Tuna Commission (IOTC) has upgraded yellowfin tuna to a 'green' rating, declaring the stock healthy and free from overfishing. This marks a shift from nearly a decade of concerns over depletion. The reassessment is based on a 2021 model and a 2023 independent review. However, The Pew Charitable Trust warns that uncertainties remain, urging continued monitoring to ensure long-term sustainability.

Illegal Red Snapper and Tuna Enforcement Act

U.S. senators have introduced the Illegal Red Snapper and Tuna Enforcement Act to combat food fraud and illegal fishing. The bill directs NIST and NOAA to develop a chemical test kit to verify the origin of red snapper and tuna sold in the U.S. This aims to improve seafood transparency and tackle illegal fishing, which is often linked to drug smuggling and human trafficking.

Update on new EU antimicrobial requirements

The EU has published a list of non-EU countries that comply with its new antimicrobial use regulations for animal products. Several countries, including India, Indonesia, and Sri Lanka (key aquaculture exporters), have yet to submit the required guarantees to prevent trade disruptions by September 3, 2026. There are concerns that products from non-compliant countries may be fraudulently routed through approved nations. Enhanced profiling (SIRA) could help detect dilution or substitution fraud.

Exciting News: Knowledge Base Analytics Launches This Month!

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.
- **Visualise 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.



Knowledge Base



IN THE NEWS: February

Dairy

In India, the Food and Drug Control Administration (FDCA) seized 1,500 kg of adulterated paneer from Dwarkesh Dairy Products during a raid on February 4, 2025. Palm oil and industrial-grade acetic acid were being used in the paneer production. The Food Safety and Standards Authority of India (FSSAI) is ramping up efforts to combat food adulteration by conducting regular surveillance, inspections and random sampling of food products. To improve food testing access, especially in remote areas, FSSAI has introduced mobile testing labs called 'Food Safety on Wheels'.

A viral video by vlogger Nikhil Saini has allegedly exposed the presence of fake paneer in street food in India, highlighting concerns over its authenticity and safety. The video demonstrates a simple test to identify fake paneer: authentic paneer remains white when in contact with iodine solution; fake paneer turns black with iodine solution indicating the presence of illegal starch. Paneer is a staple of Indian cuisine and authentic paneer should only be made from milk. Fake paneer (also referred to as analogue or synthetic paneer) is often made using palm oil, starches and other ingredients and is legal, provided it is safe and clearly labelled as 'non-dairy' by the FSSAI.

Meat

Dover Port Health Authority reported unprecedented seizures of illegal meat during January 2025 with 25 tonnes having been seized. This represents triple the amount seized in January 2024. The DPHA is experiencing a funding shortage, stretched resources and is only able to provide 20% operational coverage. Therefore these seizures are thought to be 'the tip of the iceberg' with the UK facing a potential flood of undetected illegal meat imports.

Concerns have emerged after 600kg of illegal meat was seized at Northern Ireland's Larne Port, highlighting potential vulnerabilities in UK border controls. The meat, smuggled on the Stranraer ferry, travelled through multiple UK ports unchecked, raising fears over disease

risks. It was initially allowed entry at Dover or another port but was intercepted in Northern Ireland. Experts point out weaknesses in biosecurity, especially given recent disease outbreaks like foot-and-mouth in Europe. Criminal activity in smuggling illegal meat is also increasing, with networks distributing non-compliant products to shops, further stressing food safety and authenticity issues.

Fish

In Pakistan, The Punjab Food Safety Department conducted an inspection at Basti Adda Fish Market in Jalandhar to address food adulteration, focusing on the illegal use of formalin in fish to extend shelf life.

Biological Pest Control

The Andalusian Institute of Agricultural, Fisheries, Food and Organic Production Research (Ifapa) is conducting a study in Almeria to explore the role of reptiles in biological pest control in greenhouses. The research aims to assess how these reptiles contribute to pest management and ecosystem balance. This initiative is part of the larger 'Emerging and re-emerging pests in protected horticulture' project, which seeks to identify and control pests like the tomato moth and tobacco thrips using biological methods, ultimately promoting sustainable pest control and biodiversity preservation.

Mango twig dieback disease

Researchers from Australia's Northern Territory (NT) agriculture department have discovered that the cause of mango twig tip dieback, a disease affecting mango production in Darwin since 2017, is likely to be caused by two species of fungi, *Lasiodiplodia* and *Neofusicoccum*. While these fungi usually remain harmless under normal conditions, environmental stresses such as heat or water issues can trigger the disease. Although no cure has been found yet, this breakthrough is considered a key step in combating the disease. The discovery is seen as a long-awaited first step in addressing the issue that threatens the viability of mango orchards in the region.

Fertiliser

Military Police in Brazil recovered 80 tons of stolen fertiliser on February 7, 2025. The stolen fertiliser had been diverted to a company where it had been mixed with a substance known as 'ciligram'. The incident highlights concerns regarding the safety and integrity of agricultural products. Adulterated fertilisers could pose risks to food crops and food safety. The operation also highlights the rising costs of fertilisers which are critical and expensive inputs for agriculture.

Pollution

A study yet to be published by Switzerland's Federal Office for Food Safety and Veterinary Affairs (FSVO) found traces of car tyre pollution in vegetables grown and sold in Switzerland. The study found chemical additives used in tyre production in one third of the vegetables tested. Around one hundred samples of commonly consumed vegetables including lettuce, cabbage, spinach, onions, potatoes, carrots, tomatoes, peppers, courgettes and pumpkins. It is likely the pollutants are transported via water and soil to the plants. A study by the ETH Institute of Materials Science and Technology found tyres are responsible for around 90% of microplastic pollution.

Sesame seeds

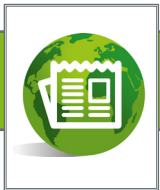
The Kano state government seized over 82 tonnes of adulterated sesame worth more than N180 million at the Dawanau International Grain Market. The seeds were to be exported to China but failed export checks having been found to contain low-quality brown sesame mixed with dust and small amounts of white sesame.

Oil

A Czech State Agricultural and Food Inspection Authority (SZPI) revealed nearly half of the olive oils samples tested failed to meet physical, chemical, sensory parameters and labelling standards. The inspections also showed an improvement in compliance compared to 2023, when 67% of samples failed.

FAO seeks experts and data on foodborne parasites

- The Food and Agriculture Organization (FAO) is seeking experts and data to inform an updated risk assessment on foodborne parasites, in preparation for upcoming expert consultations by the FAO/World Health Organization (WHO) Joint Expert Meeting on Microbiological Risk Assessment (JEMRA).
- The consultations, planned for May 2025, will focus on protozoal parasites and other parasites such as cestodes, nematodes and trematodes. The goal is to generate updated scientific advice on detection, prevention, inactivation and control of these parasites, particularly in relation to global health risks, prevalence and food safety practices. The FAO is also seeking input on current monitoring methods, including validated techniques for regulatory purposes and strategies for prevention and control, especially in low- and middle-income regions. Applications for experts are open until March 15, 2025. More information available in [here](#).



FOOD SAFETY: February

Country No of Alerts

France	102
United States	66
Turkey	37
Canada	27
Germany	25
Belgium	23
Poland	22
Netherlands	16
United Kingdom	16
China	15
India	13
Italy	13
Spain	13
Egypt	10
Mexico	9
Luxembourg	8
Denmark	7
Brazil	7
Russia	7
Czechia	7
Vietnam	6
Kenya	6
Pakistan	6
Serbia	6
Ukraine	5
Norway	5
Ireland	5
Senegal	4
Portugal	4
Nigeria	4
Austria	4
Finland	4
Hungary	4
Morocco	3
Colombia	3
United Arab Emirates	3
Iran	3
Australia	3
Sri Lanka	3
Bosnia and Herzegovina	3
Jersey	3
South Africa	2
Afghanistan	2
Peru	2
Greece	2
Taiwan	2
New Zealand	2
Israel	2
Switzerland	2
Cambodia	2
Estonia	1
Syria	1
Côte d'Ivoire	1
Ghana	1
Tunisia	1
Indonesia	1
Albania	1
Ecuador	1
Thailand	1
Uzbekistan	1
Bolivia	1
Madagascar	1
Lebanon	1
Jordan	1
Romania	1
Sweden	1
Armenia	1
Bangladesh	1
Rwanda	1
Lithuania	1
Slovenia	1
Bulgaria	1
Total	570

SUMMARY



There were **500 Red**, **62 Amber** and **8 Green** for a total of **570 safety alerts and product recalls*** in February.



The majority of alerts were for bacterial pathogens and pesticides (27.9 % and 17.4 % respectively). Allergens were third with 14.4 %.



159 Bacterial pathogen alerts (50% Salmonella, 31 % Listeria): E.coli accounted for 11 % of which 61 % were STEC.



99 Pesticide alerts (19 % Chlorpyrifos, 5% propiconazole and ethylene oxide, lambda-cyhalotrin 4%

Top 3 alerts by commodity

- 1. Ingredients:** Nuts & seeds, herbs & spices, sauces & condiments
- 2. Produce:** Vegetables, fruit and dried fruit
- 3. Protein:** Chicken, sausage, beef

Top 3 number of alerts by county of origin

- 1. France:** Cheese, sausage, molluscs
- 2. USA:** Snacking, nuts & seeds, vegetables
- 3. Turkey:** Nuts & seeds, dried fruit, salad

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

Follow us on Social Media



Food Forensics Ltd



@food_forensics

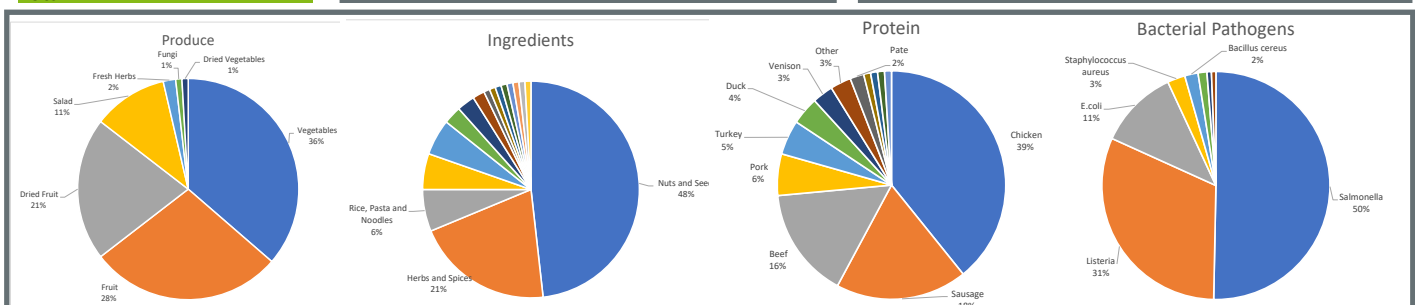
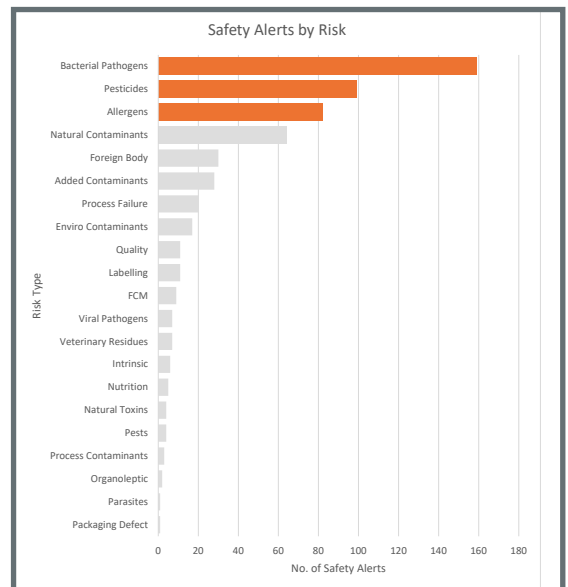
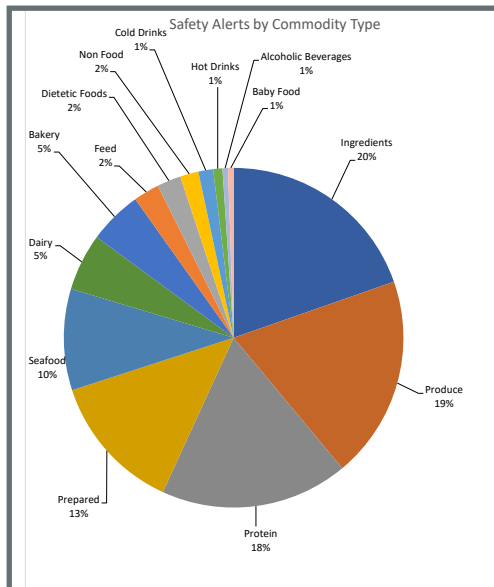
Contact us

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

+44 (0)1603 274456

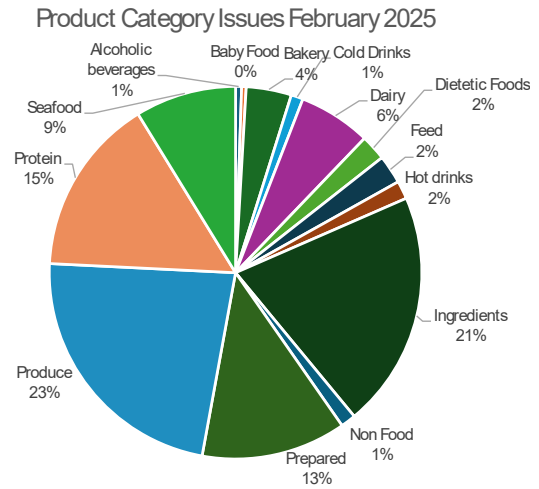
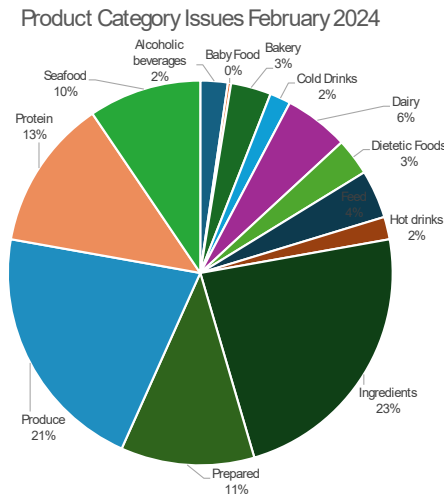
info@foodforensics.co.uk

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

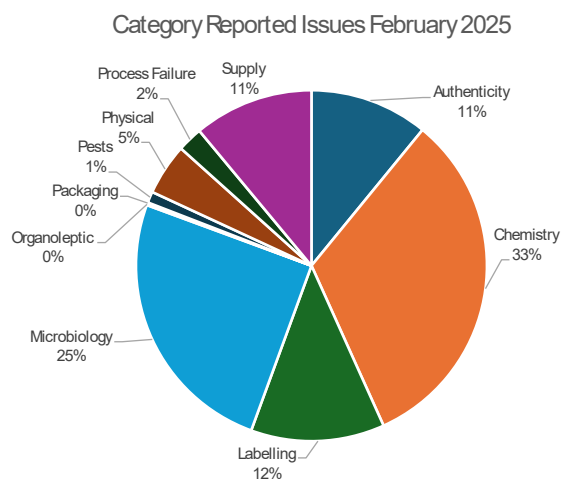
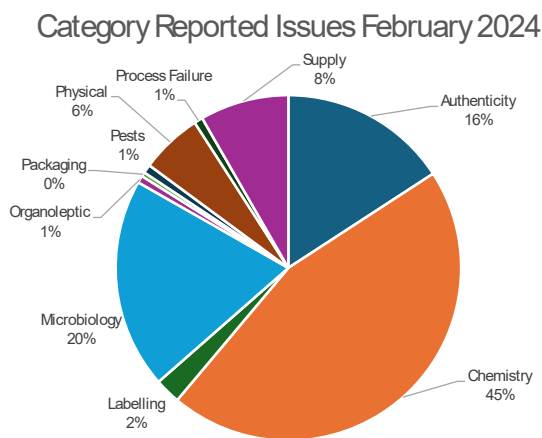




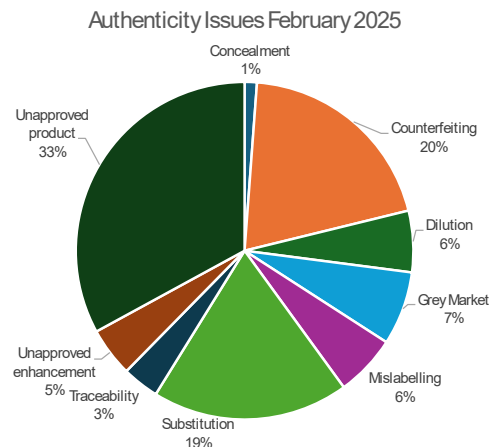
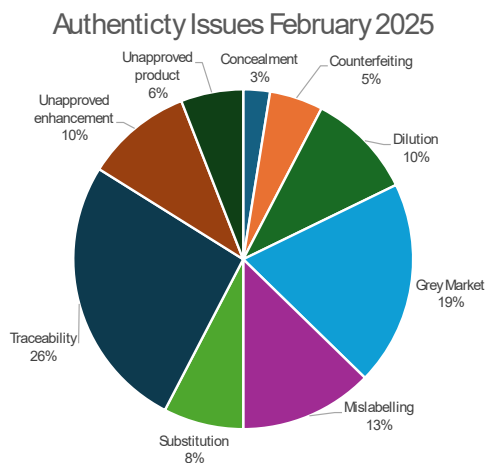
Knowledge Base Trends



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



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



A significant increase in counterfeiting in February 2025, compared to the same time last year. This has largely offset the reduction in grey market reported issues. Reported traceability issues decreased but unapproved products 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