Food Forensics Risk Newsletter

August 2025

HIGHLIGHTS

- Lemon supply tight due to smaller harvests in Europe and China.
- UK potato production under strain following prolonged dry period.
- UK National Food Crime Unit issues an amber alert after discovering adulterated saffron on the UK market.
- Poor Brazil nut harvest in Amazon regions raises fears of supply and adulteration issues.
- Increasing risk of adulteration in the coconut oil market due to tight supply and rising prices.
- Earliest start to UK harvest in 19 years driven by long dry spells in spring and recent hot weather.
- African Swine Fever cases in Germany continue in region adjacent to highest pig-producing state of North Rhine-Westphalia.

Produce

Citrus

Brazil's 2024/25 orange crop ended in June 2025 with the lowest juice export volume since 1997 (down 22.7% year-on-year) but with record-high revenue of USD 3.48 billion due to surging prices. Limited production, especially of high-quality fruit, reduced exportable supply, raising international prices but also limiting global consumption. A recovery in shipments is expected in 2025/26 if production improves and demand stabilises. However, uncertainties remain around consumer demand and the potential impact of new U.S. tariffs on Brazilian juice exports.

Florida's 2024/25 citrus season ended with the lowest yield since 1919/20. Orange production fell 33%, grapefruit 27% and tangerines and tangelos 11%, largely due to citrus greening and hurricane damage. In response, nearly $140 million has been allocated by the state to support growers through research, replanting and industry recovery.

Severe storms, hail and wind in mid-July damaged crops in Castell and Valencia (Spain), with losses to citrus crops. Other affected crops include vegetables, melons, watermelons, avocados, olives and almonds. Further losses are expected next season due to tree defoliation.

Lemon supply is tight globally due to smaller harvests in Europe and China. Early demand is attracting South African lemons to Europe, amid frost damage in Argentina and Uruguay. Prices are expected to rise, with possible shortages and bottlenecks from September when Turkey and Spain begin their seasons.

Top Fruit

British Apples & Pears Limited (BAPL) 2025 Orchard Census and Storage Report warns that UK apple and pear production could decline sharply without urgent investment. Although total orchard area has remained stable since 2016, planting has slowed, with just 145 hectares of new apple orchards planned over the next three years - a 32% drop from recent averages. No new plantings of pears are planned for 2026 or 2027 due to low profitability. Many orchards are aging and without new planting, orchard numbers could halve by 2037. BAPL is calling on supermarkets to provide long-term commitments to support grower investment and ensure future supply.

The 2025 Polish apple season is progressing well despite spring frosts potentially reducing the national crop by 10 - 15%, mainly affecting early varieties like Red Jonaprince and Gala. Later varieties such as Golden Delicious and Idared are expected to yield well.

French pear production in 2025 is forecast to decline by 7% from 2024's strong harvest but remain 8% above the five-year average, supported by increased production area. Adverse weather and pest issues are causing sharper declines in southern regions. Other major European producers are anticipating higher volumes following a weak 2024 season.

Soft Fruit

Spain's 2025 fig harvest began a week early in Alicante due to high temperatures accelerating ripening. Initial supply is limited, but demand is strong as these regions are the first to harvest and Turkish figs will not arrive until mid-August. Volumes are expected to match last year, though the lack of rain and persistent heat are resulting in smaller and sometimes overly soft fruit.

Persistent wet weather has caused widespread berry spoilage and grey mould in Estonia's strawberry harvest, reducing available volumes and pushing prices up. Growers report severe losses and challenges with pest control and a lack of effective plant protection products.

Serbia's raspberry production is in decline due to extreme weather, including early-year droughts, April frosts and a 48-day dry spell during harvest. Yields have dropped sharply, with 2025 output expected at just 10,000 - 15,000 tons. This is a stark contrast to Serbia's former status as a top global berry exporter. Without strategic support, the future of raspberry farming in western Serbia is uncertain.

South Africa's Lowveld region is facing rising *E. coli* levels in local irrigation rivers, primarily caused by failing sewage systems and growing informal settlements lacking sanitation. Farmers, especially those growing high-risk export crops like

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blueberries, citrus and vegetables, are facing increased water purification costs and the risk of international market bans.

The UK blackcurrant harvest has started two weeks early and for the first time in Herefordshire and Gloucestershire rather than Kent and East Anglia, due to shifting growing patterns and the success of new climate-resilient varieties.

Stone Fruits

British cherries are expected to be more plentiful, larger, sweeter and juicier this summer due to a warm spring with extended sunshine and daylight hours. UK growers are reporting high early-season volumes, allowing the entire summer demand to be met with domestic produce.

Cherry growers in the USA are facing significant labour shortages as fears of immigration enforcement deter undocumented workers. The H-2A visa program offers a legal route for seasonal labour, but high costs related to housing and transport deter many smaller growers. In California, cherry yields are down due to unseasonably warm winter temperatures which disrupted tree dormancy and cut production by up to 50%. Meanwhile, trade tensions with China have cost U.S. agriculture an estimated $2 billion in lost cherry exports, with shipments to China down 55% in early 2025.

Melon

The peak of Greece's watermelon season in June saw exports up 34.6% from the same period last year. Strong demand was driven by high temperatures across Europe and a shortage of stone fruits. In July, watermelon availability in Greece is set to decline sharply, with only 20 - 30% of growing areas still in production. Increased competition from Hungary, Romania and Italy is expected to pressure Greek exports, particularly due to high transport costs.

Grapes

The seedless grape harvest in Spain's region of Murcia began nearly two weeks later than usual due to unusually high June temperatures, which delayed ripening. Despite the delay, producers expect a strong season with good volumes and quality, supported by favourable weather earlier in the year and growing consumer demand. Spanish supply does not typically peak until late July.

Bananas

Ecuador's banana and plantain sector is on alert due to new outbreaks of moko disease caused by the bacterium *Ralstonia solanacearum* which leads to wilting, internal rot and can severely impact banana production.

India's banana production has faced unseasonal May rains and strong winds causing a drop in yield, black spots and Sigatoka disease. Yelakki bananas remain in high domestic demand for their cultural and nutritional value. Cavendish exports suffered due to shipping delays caused by the Iran-Israel conflict causing spoilage losses in transit. India has begun exporting to Russia and is attracting interest from European countries.

Mango

Pakistan's mango exports are under scrutiny due to alleged violations of international phytosanitary protocols, affecting trade with key markets like Iran, the EU and Australia. Complaints to government bodies claim some Hot Water Treatment (HWT) plants are bypassing mandatory treatment processes, with phytosanitary certificates issued for untreated mangoes.

Peru's mango production for the 2025/2026 season is forecast to be significantly down on last season. The decline is mainly attributed to bi-annual bearing and delays in flowering.

Exotics

Pineapple supply from Costa Rica is improving after tight availability earlier in the year due to weather and logistics challenges. Alternative varieties such as Baby Green Gold Elephante from Ghana and Baby South African pineapples helped fill the gap. Specialty pineapples, including Pinkglow and Rubyglow, are attracting new consumers who prefer less acidic fruit. Producers are increasingly sending pineapples for juice and frozen products due to global orange juice shortages and fluctuating international prices.

Lime growers in Mexico are seeing continued small fruit sizes due to prolonged drought, but recent rains could improve quality in the coming weeks. It is anticipated that prices may stay low into early August, when heat could again affect lime quality and shelf life, especially for the retail market. The European market for Brazilian Tahiti limes has rebounded sharply after a weak first half of 2025, when prices fell below production costs. Summer demand and reduced supply boosted prices in July.

Papaya production in Brazil has faced challenges due to early-year rains and mid-year climate shifts. Cold fronts in June led to smaller fruits and delayed ripening.

Salad Crops

Cucumber prices have surged sharply driven by strong demand from ongoing fine weather. Reduced production caused by recent crop changes and plants needing recovery after heavy output during sunny periods is also contributing. While there is no shortage, supply is slightly lower than in recent weeks, supporting higher prices. Other greenhouse vegetables like aubergines, yellow peppers and tomatoes are performing well.

The pepper season in Spain's Murcia region reports harvest volumes up 20% compared to previous years. This surplus is due to earlier rainfall delaying spring harvests and causing a production imbalance. Since June, the delayed volumes have come to market all at once, resulting in a price drop to around €0.60 per kg below growers break-even point. The oversupply is also due to large volumes of low-priced Dutch peppers flooding European markets, further depressing prices. Concerns are rising that due to the high production volumes in summer, the Netherlands may face a production gap earlier than usual, potentially between September and October rather than in November.

Potatoes

In the UK, after a prolonged dry spell the outlook for UK potato crops in 2025 is mixed. Irrigated crops are performing well, with healthy canopies and root systems, while unirrigated crops are showing signs of stress, with smaller canopies, nutrient uptake issues and potential yield losses. Magnesium deficiency, often mistaken for alternaria, has been identified as a concern. Aphid pressure has been unusually high, especially in drought-stressed crops, threatening yields.

Germany's potato and vegetable harvests are under growing threat from the reed glass-winged cicada (*Hyalesthes obsoletus*), which is accelerating the spread of Stolbur disease (a bacterial infection caused by *Candidatus Phytoplasma solani*). First found in southern Germany, the pest has expanded into northern regions including Lower Saxony and Saxony-Anhalt, endangering not just potatoes, but also sugar beet, onions, carrots, celery, cabbage, rhubarb and peppers.

France's ware potato production area is projected to rise by 10.3% in 2025. Final production will depend heavily on summer weather, with further assessments to follow in the coming weeks.

Butternut Squash

Butternut squash acreage in the Iberian Peninsula has dropped by 18% this year due to heavy rains in February and March, especially affecting Portugal and the Spanish regions of Seville and Valencia. Production is only expected to fall by about 10% due to strong early yields. Spain and Portugal produce around 250 million kilos annually, exporting the majority to the UK and northern Europe.

Ginger & Garlic

Spanish garlic has returned to the market, with good quality despite challenges from late rains and heat, which led to smaller bulb sizes and lower net yields. Prices have remained stable, unlike in previous years when seasonal transitions brought sharp drops. Demand is strong, partly due to reduced Spanish supply caused by stricter sorting requirements.

Chinese garlic is expected to arrive by late July or early August, with source prices slightly down but overall selling prices steady. Rising freight and import costs remain a concern.

Fresh German garlic is gaining ground, with rising local supply and strong quality. Egypt, Argentina and the Netherlands also remain sources of garlic imports.

Spices

The UK National Food Crime Unit has issued an amber alert after discovering adulterated saffron on the UK market. Tests found synthetic colours such as Tartrazine (E102), Carmoisine (E122) and Ponceau 4R (E124) illegally added to enhance appearance and suggest higher quality. Some saffron also failed to meet its declared grade due to low colouring strength (crocin levels). Businesses are urged to use reputable suppliers, verify traceability and consider product testing, especially if prices seem unusually low.

A recent study investigating 104 cinnamon samples across 11 EU countries uncovered fraud and safety issues in commercially available cinnamon. 66.3% of samples failed to meet quality standards, violated EU food safety laws, showed signs of fraud or posed health risks. Some products labelled as premium Ceylon cinnamon were lower-grade Cassia, which contains high levels of coumarin - a compound known to be toxic to the liver. 9.6% of samples exceeded EU lead limits and nearly one-fifth had elevated chromium levels, which although unregulated in the EU, remain a concern. Several products were found to be adulterated with non-cinnamon plant materials such as rice, onion, fenugreek and white mustard, indicating either accidental contamination or intentional fraud.

Nuts

Brazil nut harvests in the Amazon regions of Bolivia, Brazil and Peru have plummeted by up to 80% in 2025, with some communities reporting no yield at all. The severe shortage is linked to extreme droughts caused by recent El Nino events, which disrupted the trees' long flowering and fruiting cycle. This is the worst decline since a similar collapse in 2017. Prices have surged nearly fourfold, raising concerns about long-term market instability if buyers drop Brazil nuts from nut mixes and the damage to the essential income to thousands of Amazonian families. With rising prices and competition for remaining stocks intensifying, the risk of adulteration and fraud has increased, particularly in processed or bulk products where authenticity is harder to verify.

Ukraine's walnut exports have slowed considerably following new government export restrictions implemented on December 1, 2024. Typically, about 25% of annual walnut exports occur from November to December, but only 1% was shipped during this period. Once the world's 4th largest shelled walnut exporter, Ukraine supplied key markets like France, Romania and the Netherlands, while in-shell walnuts went to countries including Iraq and Turkey. Walnuts make up 43% of Ukraine's nut orchards, but the sector now faces major challenges.

The Almond Board of Australia (ABA) has announced that the biosecurity response levy for almonds will increase from July 1, 2025, to help cover the industry's share of costs linked to the national response to the Varroa mite incursion.

Coconut

There are concerns over the increasing risk of adulteration in the coconut oil market due to rising prices, tightening supply and increasing demand. As of May 2025, coconut oil prices have seen a 74% increase from last year's average. The oils used for adulteration are often tasteless and odourless, allowing the strong aroma and flavour of coconut oil to dominate the blend. The global coconut oil market is under pressure as key producers including the Philippines and Indonesia face challenges including extreme weather, aging trees, slow replanting and logistical issues, all of which are limiting supply.

Dried Fruit

Turkish dried apricot producers have faced major challenges this season from spring frosts in April and heatwaves causing further damage. Potential shortages of dried apricots and price rises are a real risk with exporters turning to alternative origins such as Iran to fulfil contracts.

Cereals

The 2025/26 UK harvest has started earlier than in any year since 2006, driven by long dry spells in spring and recent hot weather, with winter barley already being cut in June. By 9 July, around 10% of the winter barley crop was harvested, ahead of both last year's 7% and the five-year average of 6%. While heavy rain on 5 and 6 July briefly slowed progress, harvest has resumed and continues unevenly across regions, with the eastern and south-eastern areas leading. Some early oilseed rape has been cut with variable yields, but no widespread progress reported yet. Challenges include lower straw volumes due to short crop height caused by dry conditions and the need for careful grain storage as high temperatures risk cooling costs or rejected loads. Early yield and quality data remain limited and may not reflect the whole country.

France's 2025 soft wheat crop is forecast to rise to 33.4 million metric tons, up 30% from last year's poor, rain-affected harvest, though still below the 2017 - 2023 average of 34.96 million tons. Higher yields helped offset a smaller cultivated area. Despite weather challenges, including hot June conditions, crop quality is strong and meets export standards.

In the US, crop conditions for wheat and maize remain strong. France expects a large wheat and barley harvest, though EU wheat exports are slow. Russia cut its wheat forecast due to drought but has removed its wheat export tax for the first time since 2021, enabling competitively priced grain to flood global markets and potentially increase Russian exports by 10 - 15%, pressuring prices worldwide. Expanding global supplies and Russia's export policy currently create downward pressure on wheat futures. Despite good supply, weather and trade tensions could impact prices ahead.

Coffee

Arabica and robusta coffee prices have declined after hitting record highs earlier this year, driven by forecasts of record global production over the next three years led by Brazil. Following a period of low harvests and soaring prices, the market is showing signs of stabilising, with arabica falling from $4.30 to $2.80 per pound and robusta from $2.75 to $1.73. While this is expected to ease costs for consumers, smallholder farmers and retailers are feeling the pressure of falling margins. New plantations in Brazil and rising Vietnamese output are expected to boost global supply. The USDA forecasts Brazil will produce 65 million bags and Vietnam 31 million bags in 2025/26, potentially ending current deficits and stabilising the industry, although a supply deficit in arabica is still feared.

Cocoa

Cocoa futures have climbed amid ongoing supply challenges, despite signs of recovery. Prices have more than doubled over the past two years, driven by adverse weather and crop disease in Ivory Coast and Ghana, which together produce over 60% of the world's cocoa. Although prices have eased slightly from December's record highs due to improving output and weaker demand, they remain historically elevated. Ivory Coast's cocoa exports rose 1.3% year-on-year by June 30, but January–June exports fell 10% compared to the previous year. The sustained high cost of cocoa continues to strain the chocolate industry: Hershey recently announced double-digit price increases on its products, while Lindt saw first-half earnings miss expectations following a sharp 15.8% price hike that slowed sales.

Tea

Kenya, the world's top black tea exporter, is experiencing a severe drought that has slashed tea production by nearly 20% due to high temperatures and delayed rains. The Tea Board of Kenya projects a 2025 output of 580 million kg, down from 594 million in 2024, with tea export revenue also dropping by 20% in Q1 2025. As supply tightens, tea prices have begun to rise both domestically and internationally. However, the reduced availability and growing demand have also heightened the risk of adulteration in the market, raising food safety concerns.

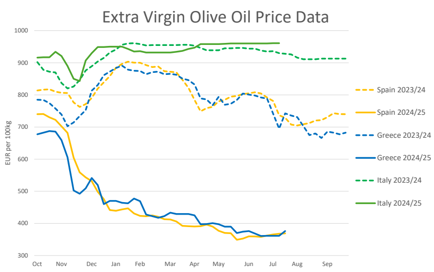
As reported in the May newsletter, global demand for matcha tea is causing supply issues with shortages expected to continue. The potential for fraudulent practices such as the use of colourings to mimic the distinctive green matcha colour could increase along with substitution with cheaper, more available teas.

Honey and Syrups

Ukraine's spring honey harvest in 2025 is reported to be one of the worst in years. Drought in 2024 left soil dry and groundwater low, while late spring frosts destroyed blossoms, especially acacia. Winter losses of bee colonies were high, especially for outdoor hives, worsened by mite infestations and pesticide exposure. With little buckwheat sown and only sunflower remaining (a low-priced honey plant) beekeepers fear further losses. Unstable summer weather adds to concerns and Ukrainian beekeeping has already suffered significant economic damage, mirroring challenges across Eastern Europe.

Olives & Olive Oils

As the 2025/26 crop year approaches, Spanish extra virgin olive oil now sits at €3.36/kg, with virgin and lampante also falling sharply. Andalusia's Cooperativas Agro-Alimentarias is calling for the activation of the EU's market withdrawal mechanism to stabilise prices and protect vulnerable producers, particularly those using dryland farming. With high stocks and uncertainty around the next harvest, concerns remain that production may surpass 1.6 million tons, pushing prices down further and threatening the profitability of many producers. In contrast to the decline of Spanish and Greek EVOO prices, the price of Italian EVOO has maintained a steady high, increasing the risk of adulteration and substitution.



Protein

African Swine Fever (ASF)

Since Germany's first report ASF last month, the disease has been detected in 39 wild boar in the state of Hesse which is adjacent to the highest pig-producing state in Germany - North Rhine-Westphalia. Four outbreaks of ASF in domestic pigs have also been reported in the same area of Hesse.

Avian Influenza (HPAI H5N1)

Between 28 and 31 July 2025, multiple outbreaks of highly pathogenic avian influenza (H5N1) were confirmed in England. Cases were reported in poultry near Dulverton and Minehead (Somerset), Tiverton (Devon), and Attleborough (Norfolk), as well as in captive birds near Yeovil (Somerset). Protection and surveillance zones have been established around affected sites and all poultry on infected premises are being culled.

The EU Commission will provide €14 million to Poland to compensate farmers affected by the 193 avian flu outbreaks between August 2021 and August 2023. The outbreaks led to significant losses in eggs, poultry meat and live animals due to control and movement restrictions. The support will cover 50% of Poland's expenses and must be paid to eligible farmers by 28 February 2026.

Blue-tongue virus (BTV-3)

Bluetongue continues its presence in the UK with two confirmed cases in sheep (Oxfordshire & Herefordshire) and three in cattle in July (Herefordshire & Norfolk).

Foot and Mouth Disease

The UK government have produced a policy paper (published 24th July 2025) detailing how it would manage suspect cases and an outbreak of foot and mouth disease in Great Britain. In South Africa, where FMD outbreaks are currently a major concern, there is demand for the procurement of vaccines to help contain the spread.

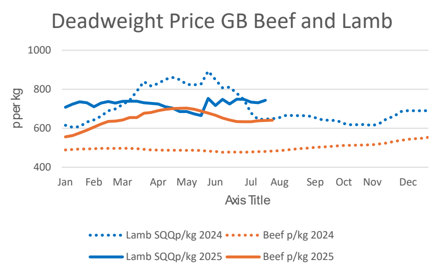
Dairy

The July 2025 GB Dairy Market Report showed milk production rose by 5% in the second quarter of the year, supported by strong farmgate prices, favourable milk-to-feed ratios and dry spring conditions. Annual production for 2025/26 is forecast at a record 12.83 billion litres, up 3.1% year-on-year. Organic milk output increased by 12.6% in Q2, offering UK producers export opportunities, especially as EU organic supply remains tight. However, the UK milking herd continues to shrink (down 0.9% on the year) with falling youngstock numbers raising concerns about future supply. The number of dairy farms has declined by 2.6%, leaving 7,040 producers, but average output per farm has grown to 1.77 million litres.

In the first quarter of 2025, UK milk deliveries showed 2.1% year-on-year increase. This growth has supported higher production of milk powders but led to a decline in cheese and butter output during the period. UK cheese production fell by 2%, but was offset by a 10% rise in imports. Most imports came from the EU, with a notable increase from New Zealand following a new trade deal. Exports, declined by 6% due to the relatively high price of British cheddar compared to global alternatives. As a result, overall cheese stocks rose by 6%. UK butter supplies remain tight. Production dropped by 3% while exports increased by 24%, driven by demand in Europe amid supply shortages and import restrictions in Germany. UK milk powder production increased by 6%, supported by strong milk supply, with imports rising 20% and exports climbing 14%. Strong demand from Asia, Oceania, MENA and Latin America helped counterbalance reduced exports to the EU.

Lamb & Goat

UK lamb production rose 3% month-on-month and 9% year-on-year in June, driven by stronger slaughter numbers and the arrival of lighter and leaner new season lambs. Despite this, cull ewe slaughter remains down due to a shrinking national flock and a later lambing season. Auction reports note earlier marketing of lighter lambs amid good prices, with limited grass growth also influencing weights.



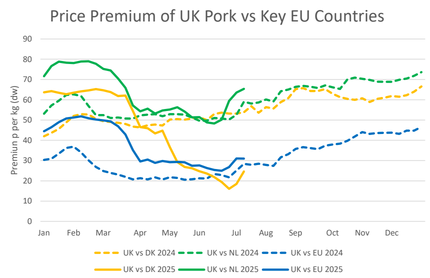
Beef

UK beef production remains low, with June output down 8% from May and 5% compared to June 2024, leading to a 4% year-to-date decline. Tight cattle supplies are reflected in reduced prime cattle slaughter and lower carcass weights, influenced by factors like forage conditions and a higher share of dairy-origin cattle.

UK Cow prices have hit record highs during 2025, driven by tight supply. Prices remain significantly above previous years, peaking in May at 541p/kg, nearly 40% higher than in January. Although prices have eased slightly since, they remain elevated. Cow slaughter (Jan to May) is down 5% year-on-year, with both dairy and suckler cow kills declining. Dairy cow slaughter fell 9%, likely due to stronger milk prices encouraging retention and challenges in sourcing replacement heifers. Suckler cow slaughter dropped 7%, reflecting long-term issues such as reduced government support and poor profitability.

Pig Meat

GB pig prices rose modestly in Q2 2025, with the EU-spec SPP averaging 207.55p/kg, up 2.79p/kg since April. The increase was supported by steady domestic demand, strong exports, especially to China and recovering EU prices. The price differential between UK and Danish, Netherlands & EU pork has seen a sharp increase during July, heightening the risk of substitution of UK pork for EU pork.



Chicken & Turkey

EU poultry meat imports rose by 13.7% in Q1 2025, reaching 254,756 tonnes, driven by sharp increases from Brazil (+30.1%) and China (+71.8%). UK imports to the EU also rose (+9.5%), while Ukraine's fell (-5.5%). Exports from the EU remained stable, up just 0.8%, with strong growth to Ghana (+45.4%) and the DRC (+8.9%), but declines to Vietnam (-16.3%) and Ukraine (-2.6%). Average EU broiler prices stayed high at 295.05/100 € per kg, above Brazil (€253.59) and the US (€114.96).

In May 2025, UK broiler chick placings rose 1.8% to 96.9 million, boosting poultry meat production by 1.9% to 163.9 thousand tonnes, despite a slight drop in broiler slaughterings. The turkey sector continued to decline, with poult placings down 13% and meat production falling 23%. Layer chick placings also dropped by 7.1%. Boiling fowl slaughterings rose 11%, while broiler egg sets increased 2.4%, and layer egg sets rose 3.2%, with turkey egg sets unchanged.

Egg Layer

EU egg imports surged by 52.1% in Q1 2025 compared to the same period in 2024. EU exports grew by 5.4%, with the UK remaining the top destination importing 13.3% more than last year. Prices for Class A eggs in the EU increased 30.4% year-on-year. In 2024, barn systems dominated EU egg production (39.5%), followed by enriched cages (38%), free-range (15.8%), and organic (6.7%), with Germany and France leading in barn and free-range systems respectively.

The UK laying flock is expected to reach a record high this summer, potentially exceeding 45 million birds between July and October, driven by strong pullet placements earlier in the year.

Cod & Haddock

Marine scientists have issued warnings about the declining cod stock in the Barents Sea, advising a significant quota cut to 21% below the current agreed quota and 14% lower than last year's advice. Contrary to this advice, Russian fishery scientists at VNIRO have proposed a 2026 Barents Sea cod quota of 315,033 metric tons, an increase compared to 2025. For Northeast Arctic haddock, the outlook is more positive with a 2026 quota increase of 18% from the agreed quota and 43% higher than the 2025 recommendation thanks to growing stock.

Salmon

Russia's 2025 salmon catch is gaining pace but is expected to reach historic lows. Scientists predict a total catch of about half of 2023's 609,000 MT due mainly to the pink salmon's two-year cycle. Russia is enhancing monitoring using drones, hydroacoustic tools and spawning surveys and has released over 1 billion salmon fry since June.

Anchovy

After a good start to the anchovy season in Peru, fishing has slowed with an increase in juvenile fish and some anchovies beginning to spawn in rising sea temperatures. Small-scale fishing bans have been announced.

Animal Food

Pet-food RASFF Alerts & Recalls

A Ghent University study has raised concerns over the nutritional quality and labelling accuracy of insect-based pet foods in Europe. Of 29 products tested, 76% did not match declared values, and only 10% met European guidelines. Many lacked essential nutrients and had incorrect calcium-to-phosphorus ratios. Genetic tests also revealed undeclared animal DNA in 25% of hypoallergenic products, posing allergy risks. While insect-based pet foods show potential, the study highlights the need for stricter quality control and further research to ensure safety and nutritional adequacy.

On June 18, 2025, the FDA warned Answers Pet Food (Lystn LLC) after an inspection linked it to dog illnesses. The facility tested positive for Salmonella and Listeria, with genetic matches between product and environmental samples. The FDA cited failures in hygiene, preventive controls, and supplier verification.

General

Environmental

China has begun constructing the world's largest hydropower dam, the Motuo Hydropower Station, on the Yarlung Tsangpo river in Tibet. While Beijing claims it will support local development and ecological protection, the project has sparked alarm in India and Bangladesh, which rely on the river downstream. Experts warn China could control water flow to these countries, risking floods or shortages. Despite government promises, the project raises major environmental and geopolitical concerns.

Climate change

A new report warns that the UK's fresh food supply is at serious risk unless retailers and importers act to address climate change. With the UK importing nearly half of its vegetables and over 80% of its fruit, rising global temperatures and extreme weather threaten food security. The report, by Aethr Associates and the Fresh Produce Consortium, shows that most imports come from 10 countries where temperatures and water stress are set to rise sharply by 2050. This could lead to failed harvests, higher prices and supply shortages.

National Food Strategy

The UK Government has launched a new National Food Strategy for England, aiming to create a more resilient, sustainable food system in response to climate change, nature loss and environmental risks. Replacing the previous strategy, it addresses past criticisms by setting ten goals that link agriculture, trade, health and the environment.

Sustainability

Mexico, the world's top avocado producer, launched the 'Route to Sustainability' in April 2025 to boost environmental and social standards in its avocado export sector, aligning with new government regulations on deforestation and labour rights. The initiative targets water conservation, biodiversity, emissions cuts, and zero deforestation by 2035.

Conservation

A Reuters investigation revealed that many conservation projects in Brazil's Amazon rainforest intended to generate carbon credits and combat deforestation are entangled with individuals and companies previously fined for illegal logging and environmental violations. In some cases, illegal deforestation occurred within the areas registered for carbon conservation. These projects, certified by registries like Verra and Cercarbono, are part of a global voluntary carbon market. Though designed to offset emissions by preserving forests, critics argue they may be enabling greenwashing by reducing deforestation in one area while supporting it elsewhere.

Fairtrade

Turkey has been officially approved as a Fairtrade producer country, allowing it to supply certified raw materials, such as hazelnuts, under Fairtrade standards. Turkey's inclusion expands Fairtrade's sourcing scope in Western Asia. The Fairtrade Network of Asia and Pacific Producers (NAPP) will support Turkish producers, who must undergo certification through Flocert and comply with Fairtrade's social, economic and environmental standards.

EU Deforestation Regulation (EUDR)

On July 9, 2025, the European Parliament adopted a motion rejecting Implementing Regulation (EU) 2025/1093, which sets the method for classifying countries by deforestation risk under the European Deforestation Regulation (EUDR). Though non-binding, the vote signals mounting political opposition. Despite this, the regulation remains legally in force and companies must continue following the risk classification in their due diligence.

Animal Welfare

Switzerland has introduced new animal welfare labelling rules for food products of animal origin. The labels must indicate if animals were subjected to painful procedures without anaesthesia or stunning. The law covers practices such as castration, dehorning, tail docking, teeth clipping, beak clipping and force-feeding (such as geese for foie gras). It affects both local and imported products, with a two-year transition period for compliance.

Workers' rights

China's growing dependence on Southeast Asian labour for its distant-water fishing fleet has led to allegations of abuse by recruitment agencies, particularly wage theft. Workers, hired via intermediaries rather than directly by Chinese firms, have limited ability to assert their rights. Similar labour rights concerns have also been raised by Indonesian fishers on Taiwanese vessels.

Tariffs and Trade

India's seafood industry is set for significant export growth following the signing of the India-UK Comprehensive Economic and Trade Agreement (CETA) on 24 July, which removes import tariffs on 99 percent of Indian marine products entering the UK. This deal is expected to boost India's seafood exports to the UK by 70% in the coming years. Key products benefiting include shrimp, frozen fish and value-added seafood items. The UK-India free trade agreement (FTA) also offers a key opportunity for the export of UK seafood, including Scottish salmon. Finalised in May 2025 and set to take effect in 2026, the deal is expected to boost bilateral trade by £25.5 billion a year.

The potential introduction of a 50% tariff on Brazilian fresh fruit imports by the US, starting August 1, 2025, has caused widespread concern in Brazil's fresh produce sector. Key export segments like mangoes and grapes face immediate risks, leading to suspended contracts and a shift to spot market sales amid shipment delays and cancellations. Previously optimistic export forecasts have turned uncertain due to expected declines in US demand and the risk of oversupply in other markets. The tariff threat may redirect exports to the EU or domestic markets, straining those channels and impacting prices further.

Pesticides - Kenya

The Kenyan government has immediately withdrawn 77 pesticide products from the market after they were found to contain harmful active ingredients. Additionally, the use of 202 products has been restricted, while 151 others remain banned pending ongoing reviews expected to conclude by December. Importers are now required to ensure products are registered in their country of origin and pesticides banned in major markets like the EU, USA, Australia and Canada cannot be registered or imported until the review is complete.

Echinacea supplements

The US Botanical Adulterants Prevention Program (BAPP) has released a bulletin highlighting ongoing issues with adulteration and mislabelling of echinacea supplements. While most products contain echinacea, some include undeclared species, wrong plant parts, or adulterants like *Cistanche deserticola*, a protected species under CITES regulations.

IN THE NEWS: July

General

Seventeen people in China, including the head of a local hospital and 10 government officials, are under investigation after 247 children at a kindergarten were found with high levels of lead in their blood. Staff at the kindergarten allegedly added paint powder to food to make it look more appealing. Authorities also found that the hospital had falsified blood test results to under report lead levels. One child had lead levels 38 times the normal amount.

Dairy

Authorities in Italy uncovered a major food fraud involving over three million litres of pasteurised milk imported from Malta but falsely labelled and sold as Italian, often marked as Sicilian. Shipment documents were altered to hide the milk's true origin and pasteurisation, falsely declaring it as raw Italian milk. Many Italian dairies unknowingly used the Maltese milk to produce cheeses and other dairy products marketed as locally made, violating food origin laws and misleading consumers.

Seafood

Danish seafood-processing company Espersen has confirmed it will close its processing facility in Grimsby, UK, following a strategic review prompted by declining production volumes and reduced demand. The company cited high prices for Norwegian Atlantic cod and sanctions on Russian raw materials as contributing factors.

Fruit

A complaint has been filed against Azura (who operate large greenhouses in Western Sahara) with Spain's Ministry of Consumer Affairs over alleged mislabelling of cherry tomatoes grown in Western Sahara but sold as Moroccan in Carrefour stores. The EU Court has ruled that produce from Western Sahara must be labelled as such, not as Moroccan, to avoid misleading consumers.

The Bergerac Criminal Court has sentenced the manager of Fruits Rouges du Périgord to a suspended prison term and €50,000 fine for relabelling over 400 tons of imported red fruit as French between 2020 and 2021. The mislabelled products were distributed across major French supermarket chains. The deception represented about 5% of France's annual soft fruit production.

A recent inspection by the Taipei Department of Health found that 25% of fresh fruits and vegetables in local markets failed safety checks, mainly due to excessive pesticide residues.

Rice

In Indonesia, four rice producers have been accused of mislabelling lower-grade rice as premium. The companies involved are Wilmar Group, PT Food Station Tjipinang Jaya, PT Belitang Panen Raya and PT Sentosa Utama Lestari/Japfa Group. Authorities allege they mixed high-quality rice with inferior varieties and sold it under false labels.

Wines and spirits

Adulterated toddy has resulted in seven fatalities in India. The toddy, often given to children to help them sleep, was laced with the sedative alprazolam.

Food Standards Scotland (FSS) has again warned consumers to stay alert after counterfeit 35cl bottles of Glen's vodka containing harmful isopropyl alcohol were discovered (25.07.2025). The fake vodka, which tastes and smells unusually strong, can cause symptoms like vomiting, dizziness, and in severe cases, coma or death. The agency proeviously warned of counterfeit Glen's vodka in August 2024.

Confectionery

The UK FSA issued an urgent recall of the Noesis Schokolade Love of Dubai chocolate bar due to undeclared peanuts, posing a serious risk to those with peanut allergies. The recall is part of a wider concern over imported Dubai chocolates lacking proper allergen and ingredient labelling.

Illegal pesticides

It has been reported that Greek farmers are increasingly using illegal pesticides smuggled from countries like Bulgaria and Turkey due to high costs of legal alternatives. These banned chemicals, though cheaper and often seen as more effective, pose serious health and environmental risks. The trade is highly organised, with limited enforcement due to under-resourcing.

Worker strikes

As reported in the July newsletter, the pay strikes during June and July at the Encirc site in Avonmouth which bottles and packages wine for the major supermarkets, have the potential to cause supply shortages until an agreement is reached.

Workers at KP snacks are voting on potential strike action over pay. If approved, striking could begin in September with possible disruptions to major brands including Hula Hoops, Pom-Bear and Discos.

Biosecurity

Dead Japanese beetles (*Popillia japonica*) have been found in Belgium. These invasive pests, which feed on over 400 plant species, pose serious threats to agriculture, horticulture and ecosystems. The beetles were discovered in a warehouse receiving goods from northern Italy, a known infested area. Though only dead specimens were found, surveillance has been increased. The beetles are already established in Italy, Switzerland, and the Azores, and regularly intercepted in other EU countries.

Organics

The European Food Safety Authority (EFSA) has released a report examining 21 unauthorised chemical substances frequently found in organic plant and apiculture products. These substances, which include glyphosate, fosetyl-Al, and cypermethrin, are not permitted in organic farming but are allowed in conventional agriculture, biocides or veterinary medicines.

Food Safety July

Country	No of Alerts
France	136
United States	36
Germany	35
India	25
Poland	25
Italy	25
Canada	23
Spain	23
Belgium	23
China	21
United Kingdom	21
Turkey	15
Czechia	14
Netherlands	12
Egypt	10
Norway	9
Ecuador	9
Denmark	9
Argentina	8
Pakistan	8
Luxembourg	8
Nigeria	7
Ukraine	7
Australia	6
Ireland	6
Switzerland	5
Austria	5
Vietnam	5
Albania	5
Uzbekistan	5
Bulgaria	4
Morocco	4
Romania	4
Finland	4
Bangladesh	3
Kenya	3
Sri Lanka	3
Indonesia	3
Syria	3
Sweden	3
Hong Kong	3
Japan	3
Afghanistan	2
Brazil	2
Sudan	2
Malaysia	2
Israel	2
Chile	2
South Africa	2
New Zealand	2
Iran	2
Greece	2
Taiwan	2
Colombia	2
Uganda	2
Hungary	2
Estonia	2
Peru	2
Russia	2
Lithuania	1
Iran	1
Portugal	1
Latvia	1
Liechtenstein	1
Serbia	1
Cambodia	1
Singapore	1
Niger	1
Slovenia	1
Madagascar	1
Azerbaijan	1
Mexico	1
South Korea	1
Algeria	1
Bosnia and Herzegovina	1
Iceland	1
Iran	1
Cyprus	1
Belarus	1
Jersey	1
Total	**641**

SUMMARY

- There were 623 Red, 14 Amber and 4 Green totalling **641 safety alerts and product recalls*** in May
- The majority of alerts were for bacterial pathogens and pesticides (28.1% and 13.4% respectively). Allergens were third with 10.8%.
- 180 bacterial pathogen alerts (48% Salmonella, 39% Listeria): E.coli accounted for 6% of which 55% were STEC.
- 69 Allergen alerts (14% undeclared milk, 14% undeclared sulphites and 13% undeclared wheat)

Top 3 alerts by commodity

1. Ingredients: Nuts & seeds, herbs, spices & rice, pasta & noodles
2. Produce: Fruit, vegetables and dried fruit
3. Prepared: Chicken, pork, beef.

Top 3 number of alerts by county of origin

1. France: Pork, herbs & spices, fish.
2. USA: Nuts & seeds, sandwiches and salads.
3. Germany: Fish, sweets & desserts.

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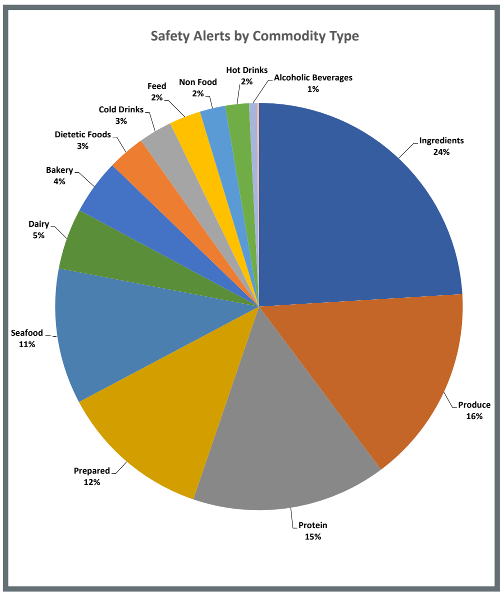
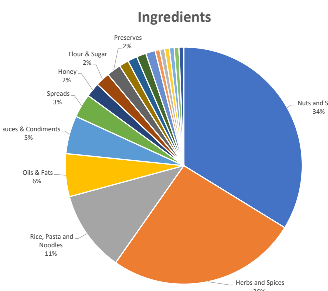
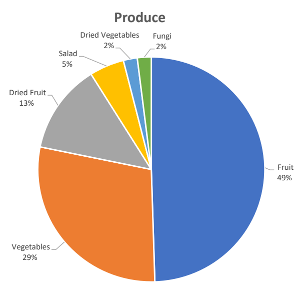
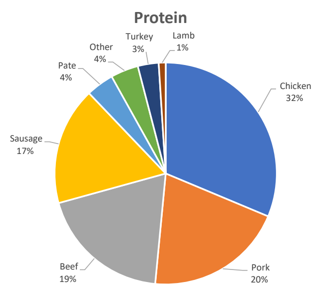
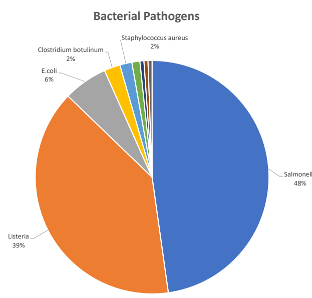
*Safety alerts & product recalls compiled from RASFF, FDA, AFSCA,CFIA, Rappel Consommateur, potraviny na pranyr, SFA, CFS, MPI, FSAI & Food Standards AU



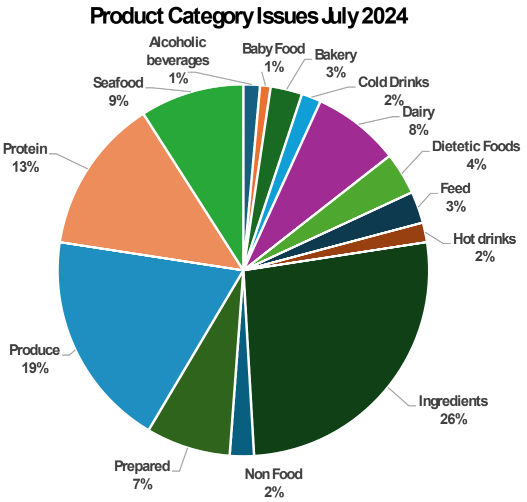


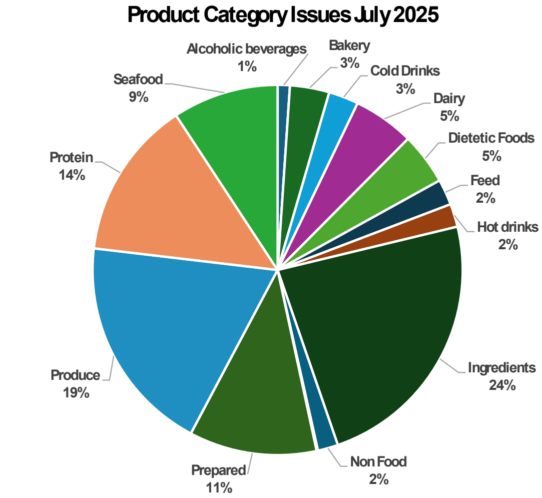




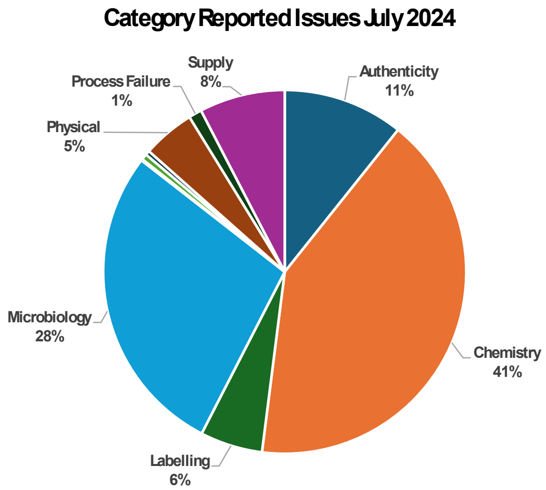


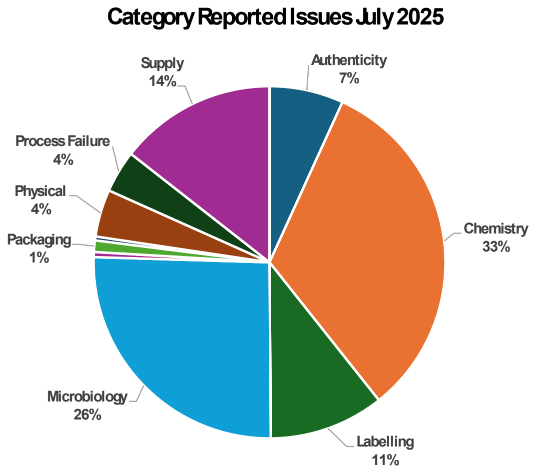
Knowledge Base Trends



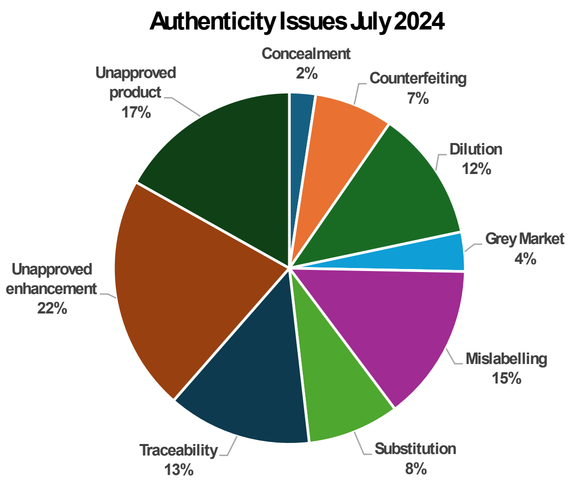


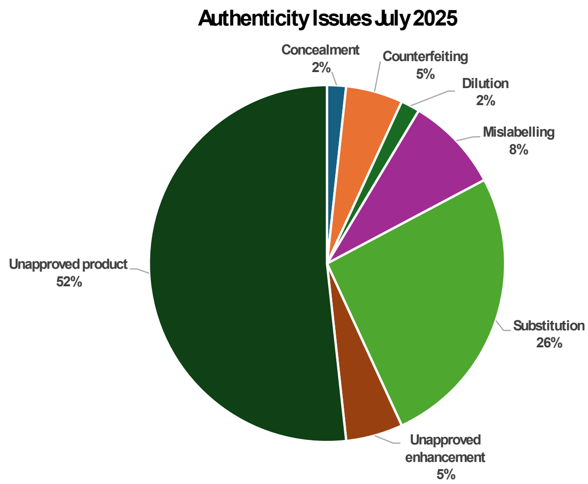
July 2025 has resulted in a similar product category profile to 2024. A slight increase in the proportion of issues reported in in-dairy, prepared and dietetic foods.





July 2025 has seen an increase in issues related to labelling, supply and process failure, but a large decrease in reported chemistry issues.





The distribution of authenticity issues shows considerable differences between July 2024 and July 2025. Reports of unapproved product increased from 17% in July 2024 to 52% in July 2025 and substitution from 8% in July 2024 to 26% in July 2025.

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