



Food Forensics Risk Newsletter

January 2026



HIGHLIGHTS

-  Storm Emilia disrupts exports from Morocco and causes potential phytosanitary issues with tomatoes.
-  Shortage of Turkish dried apricots prompts buyers to investigate alternative sources such as Georgia and Uzbekistan.
-  Reaction of honey suppliers to the EU Breakfast Directive and origin labelling requirements is proving interesting.
-  China increases its presence in the olive oil market.
-  African swine fever hits Spain's pork sector.
-  Sheep and goat pox threatens Greek feta supplies.
-  Norwegian salmon prices drop sharply as Scottish salmon prices increase.

Produce

Citrus

Mexican lime supply has tightened due to poor quality fruit as a result of recent rains and the end of the older crop, with approximately 50% of fruit failing US export standards. Most fruit currently comes from Veracruz, but quality issues persist across growing regions. The new crop is delayed after rain disrupted blooming, leading to low volumes expected until late February, with better supply anticipated in March if weather is favourable.

The 2025-2026 orange crop forecast for Sao Paulo and West-Southwest Minas Gerais has been revised down 3.9% from the September estimate and 6.3% below May's projection. The decline is due to smaller fruit size and increased premature fruit drop. By mid-November, 65% of the crop was harvested, with most early varieties nearly complete. Rainfall deficits (20% below average overall) and strong winds contributed to fruit loss. Further updates are expected in February and April 2026.

Top Fruit

Turkish pomegranate production in 2025 is estimated to be 35% lower than last year and up to 50% down compared to 2023, mainly due to cold weather in spring, high summer temperatures and water shortages affecting trees and fruit development. Similar challenges have

impacted other major producers including Italy, Greece and Spain, affecting yields and quality.

Hungary's 2025 apple harvest is expected to drop below 160,000 tonnes - approximately half of last year's low output and the smallest on record. Only 60,000 to 80,000 tonnes will be suitable for fresh consumption, with the rest for processing.

Soft Fruit

The International Blueberry Industry Association highlights Southeast Asia, the Middle East, and especially India as key short-term growth markets for berries. China is expanding to near year-round berry production with genetic advances helping berries adapt to warmer climates. Peru remains the world's largest blueberry exporter.

Stone Fruits

The Chilean cherry season is underway with lower volume forecasts and earlier harvests and shipments. Initial projections of 131 million boxes have been revised down to 115-120 million, compared to 126 million last season. Factors causing the decline include frost, aggressive pruning after a high-yield year, pricing challenges, and orchard fatigue.

A severe hail and rainstorm in Argentina's western Valle Medio has caused major damage to the cherry harvest. With up to 40mm of rain followed by sunshine, widespread fruit cracking occurred, leaving large volumes unmarketable.

The season was already down 25%, and producers now estimate losses could reach 50%, with around 25% of fruit still unharvested. The damage may also impact next season's production due to plant damage.

Bananas

Costa Rica's banana production is expected to drop by 10-15% in 2025 due to poor weather and pest-related diseases linked to heavy rainfall during the first half of the year. Despite lower volumes, international prices have risen, though the challenge remains regarding how much consumers and supermarkets are willing to pay for the fruit. The sector's stability depends on productivity, cost management and securing reliable contracts with importers, amid rising production costs.

Ecuador has confirmed the presence of the Fusarium Wilt Tropical Race 4 (TR4) fungus on a banana farm in El Oro province and declared a six-month phytosanitary emergency. The case, detected on a seven-hectare farm near the Peruvian border, triggered long-prepared containment protocols. As the world's largest banana exporter, Ecuador has invested over US\$34m in prevention efforts to limit the spread of the disease and protect exports.

Exotics

The Peruvian mango sector is experiencing a tough season marked by lower fruit sweetness than required by

key buyers and social unrest in producing regions. Initial high price expectations proved unsustainable, leading to a growers' strike in late November halting harvesting. Mango sweetness levels are below the standards required for the US and Korea, limiting market options mainly to Europe, where demand is weak and prices low. Supply is down 30-40% from last year, with irregular volumes complicating logistics.

Flooding across key agricultural regions in Vietnam is damaging orchards and raising concerns about future fruit supply. Pineapples are among the worst affected, with other fruits such as mangoes and stone fruit also impacted through delayed growth and potential permanent losses in young plantings.

Salad Crops

Storm Emilia has caused severe flooding in Morocco since December 13. Authorities issued widespread alerts, and agricultural exports faced a three-day suspension due to halted maritime shipments to Europe. The key export region, Souss Massa, is not directly flooded but is experiencing cold, humid weather that is delaying crop development and causing phytosanitary issues, especially in tomatoes and raising concerns of upcoming shortages.

The reduction in imports of puree into Italy from China suggest Italian supply is likely to become tight as demand for Italian origin pressures supplies as the season progresses.

Edible flowers and pollen

A recent study by Rey Juan Carlos University highlighted food safety concerns linked to the growing consumption of edible flowers, particularly focusing on toxic pyrrolizidine (PA) and tropane alkaloids (TA). These flowers, used fresh or in products like teas, supplements and honey, may also carry pesticide residues, heavy metals, pathogens and physical contaminants. While most heavy metal levels are below regulatory limits, microbiological risks exist due to raw consumption. Although EU regulations cover herbal infusions and supplements, fresh flowers remain mostly unregulated, with some samples showing high alkaloid levels. Pollen can also accumulate these toxins.

Potatoes

Defra has declared the Colorado beetle, a major potato pest first found in Kent in 2023, eradicated from the UK after two years with no new sightings. The beetle,

which damages potatoes and related crops, posed a significant economic threat but no risk to human health.

World Potato Markets estimates the 2025 UK potato crop at 4.9 million tonnes raising concerns about potential overproduction and storage, a problem also seen in other European countries. UK potato prices have dropped with the new crop but remain higher than on the continent. The NFU Potato Policy Group Chair emphasised the need for growers to match production with market demand amid increasing weather variability.

Brassica

Egyptian cauliflower and broccoli exports to the UK have surged for the fourth consecutive season, reaching a record 879 tons and over US\$3 million in value in 2024/25 (2.3 times more than the previous season). This marks a nearly 626% average annual growth since regular exports began in 2022/23. Peak shipments occur in winter, with January 2025 alone matching almost the entire previous season's volume. While Spain remains the UK's largest supplier (70-80%) of brassicas, its and France's shipments fell slightly in 2024/25, allowing alternative exporters like Egypt, Poland, Germany, Italy and Portugal to increase their market share.

Avocado

The Moroccan avocado season has started with low harvests and cautious growers disappointed by falling prices. Exporters face a saturated European market with strong competition from Peru, Chile and Colombia, pushing prices down. As a result, many Moroccan growers are delaying harvesting, waiting for a potential price rise in January, though future prices remain uncertain amid fierce competition.

Garlic

In Europe, Italy's garlic market is stable, while Spain struggles with reduced output and higher costs, causing buyers to shift toward more consistent, often cheaper sources like China. In Africa and the Mediterranean, supply is expanding, especially in Egypt and South Africa, though informal trade and weather uncertainties pose challenges. Overall, the season is marked by high global availability, fierce competition and shifting sourcing strategies.

Spices

Indian cardamom exporters are seeing an opportunity to capitalise on a significant crop failure in Guatemala which is

expected to cause production to fall to around 17,000 tonnes from a usual 40,000–50,000 tonnes. The scarcity of Guatemalan cardamom increases the risk of substitution or adulteration with contaminants to 'stretch' supplies.

Nuts

Turkey, the world's top hazelnut supplier, is facing a significant production drop in 2025 due to spring frosts. This shortage has caused prices for premium hazelnuts to more than double, reaching around \$18/kg in October. The poor quality in part of the crop has driven prices higher for top grades, impacting the global market as Turkey supplies nearly two-thirds of the world's hazelnuts. Some suppliers have resorted to mixing new and old stocks, a banned practice. Economic pressures in Turkey led to some sales at improved prices by late November, but prices remain historically high.

Chile's hazelnut harvest is strong in 2025, with production around 120,000 tons, benefiting from good yields and support from Ferrero. The US, Georgia, Italy and Azerbaijan also saw production increases, helping manufacturers diversify supply and slightly ease prices.

Truffles

Repeated droughts have caused a significant decline in truffle production in France's Périgord region, with quantities dropping sharply in recent years. Growers are adapting by investing in irrigation and rainwater recovery systems to maintain production. Meanwhile, truffle cultivation is expanding northward to regions such as Saumur, where warmer temperatures and moisture-retaining soils offer better conditions.

Dried Fruit

Spring frosts in Turkey during April 2025 caused severe damage to the apricot crop, driving up global dried apricot and forcing buyers to seek alternative suppliers. Georgia, which has benefited from good weather, growing processing capacity and a rising interest in dried fruit production, has seen demand for its dried apricots and other products such as plums, figs, persimmons, blueberries and fruit leather surge, with prices more than doubling since May. Meanwhile, Uzbekistan has entered the Danish market for the first time, shipping dried fruits under a contract with a major importer.

Egyptian exports of Medjool dates to Turkey stopped before the end of the year after the annual 5,000-tonne export quota

was reached early, causing difficulties in preparing for Ramadan, which starts in February. Turkish importers have turned to other suppliers like Palestine and Jordan to build stocks for Ramadan.

Rice

Japan's average retail price of rice reached a new record high of ¥4,335 per 5 kg in early December according to agriculture ministry data. Additional surveys of supermarkets and retail stores also showed price increases, reflecting a broader rise in rice prices across Japan.

Cereals

Defra's 2025 UK crop production estimates show lower yields for most cereals compared to 2024, except for winter barley. Wheat production is up 7.3% to 12 million tonnes, driven by a 9.1% larger area despite a 1.7% yield drop to 7.2 t/ha. Barley output has fallen 10% to 6.4 million tonnes, with spring barley production down 16% and yield down 5.4%, while winter barley sees a 1.2% production rise and 7.2% yield increase. Oat production has dropped 2.3% to 963,000 tonnes due to a 10% yield decline despite an 8.8% larger area.

The USDA projects record global wheat production of 837.8 million tonnes for 2025/26, outpacing consumption growth and putting downward pressure on wheat markets. UK feed wheat futures hit a contract low of £170.10/t. Sterling's recent rise against the dollar, following a US interest rate cut, added further market pressure.

Tight supply of regenerative wheat for bread flour moves supply and demand out of kilter.

Oilseeds

Oilseed markets, including Paris rapeseed futures, have gained support from Germany's approval of the EU's RED III renewable energy directive, boosting biodiesel demand. The US market also saw momentum from new soybean sales, including shipments to China.

UK Oilseed rape production has risen 7% to 893,000 tonnes, as a 30% yield increase offsets an 18% smaller area.

Pulses

Roasted chickpeas snacks, or chana, adulterated with a synthetic yellow dye typically used in textile and paper manufacturing and not intended for human consumption were identified in India during food safety checks. The incident

has raised concerns regarding food safety and adulteration in the Indian snack market.

Coffee

Brazil's coffee supply, which has driven prices to record highs this year due to drought and tariffs, is expected to recover strongly in 2026/27. Recent above-average precipitation in key growing regions and higher Brazilian production forecasts have reinforced expectations of ample supply and eased prices. Arabica output is forecast to rise by 24% to around 47 million bags, boosted by the biennial crop cycle and higher farmer investment, while robusta production may decline slightly. Vietnam's robusta supply is also set to grow, supporting global availability.

The easing of US tariffs on Brazilian coffee should help normalise trade flows. Despite tighter stocks and elevated prices this year, improved supply next season is likely to increase inventories and put downward pressure on prices. However, weather remains a key risk causing ongoing uncertainty.

Cocoa

Cocoa prices have followed a downward trend due to expectations of improved West African yields from favourable weather in Ivory Coast and Ghana. Ivory Coast farmers report good tree blooming and pod development, with recent cocoa arrivals at ports slightly up year-on-year, indicating ample supply. Mondelez noted the current cocoa pod count is 7% above the five-year average, supporting a positive harvest outlook.

The EU's one-year delay of its deforestation regulation (EUDR) has helped cocoa imports to flow freely, easing supply concerns. However, weak global demand weighs heavily, with disappointing chocolate sales reported in the US and falling cocoa grindings in Asia and Europe.

Tea

Cyclone Ditwah caused devastating damage across Sri Lanka in late November, particularly in the central tea-growing hills, with landslides and floods burying homes, roads and plantations. The Sri Lankan tea industry has estimated a 30–35% drop in tea crop yields due to weather damage and reduced worker availability.

Wine

Australia's wine supply-demand imbalance has worsened as 2024-25 production exceeded sales, causing national stock

levels to rise by 5%, according to Wine Australia's 2025 report. Production reached 1.13 billion litres, up 9% from 2024 but still below the 10-year average, while sales remained steady at 1.08 billion litres. Export sales grew slightly, but challenging global conditions (especially reduced demand from China) and declining domestic consumption have compounded the issue. The national stock-to-sales ratio increased to 1.9, 15% above the 10-year average, mainly due to higher inventories of still white wine.

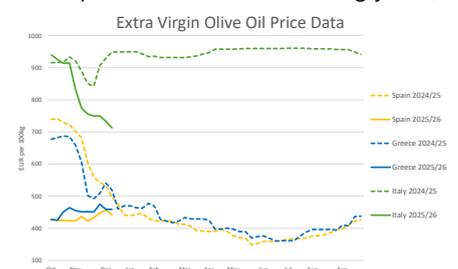
Honey and Syrups

The new EU Breakfast Directive, which is set to take effect on 14 June 2026, could bring significant change to the European honey market. The Directive will require honey producers to disclose the full country of origin for every component in honey blends on the front label, along with the exact percentages from each country. This ends the common practice of labelling such as 'Blend of EU and non-EU honeys' which has often concealed cheaper, imported honeys and complicated transparency.

It is notable that Europe's largest honey packer (Langnese) has started selling rice syrup. It raises questions about whether this shift to syrup is simply a coincidence or a strategic move to prepare for the new transparency rules, which may disrupt the traditional blended honey market. This development could also signal a broader market transition, where producers move away from complex, hard-to-verify honey blends toward syrups that offer simpler labelling and supply chains. Over the next 18 months, the industry's response will reveal which companies are ready to embrace transparency and which might pivot away from honey altogether. Stricter regulations aimed at protecting product integrity and consumer trust could drive shifts in consumer products and supply chain strategies.

Olives & Olive Oils

China's olive oil production was reported to be a record 12,200 metric tons in the 2024/25 crop year, marking nearly a fivefold increase over the past decade. Industry experts believe China's olive oil output could double in coming years,



driven by expanding acreage, improving yields, and government backing focused on underdeveloped regions.

Italian EVOO price has seen a drop but remains approximately €46/100kg above its 5-year average. Greek and Spanish prices have seen a slight increase but remain below last year's levels and their 5-year average prices.

Protein

African Swine Fever (ASF)

Spanish authorities are considering a large-scale wild boar control programme in Catalonia after African Swine Fever (ASF) was detected in wild boar near Barcelona. No pig farms have been infected, though pigs from the affected area are being slaughtered for domestic sale due to export bans. The Catalan government is studying measures to halve the wild boar population, estimated at up to 180,000, alongside enhanced surveillance and biosecurity beyond traditional hunting. The outbreak is hitting the Spain's pork sector hard: Catalonia accounts for 40% of Spain's pork processing, pig prices have fallen sharply. Spain is the EU's leading pork producer, accounting for approximately 25% of the bloc's output.

Avian Influenza (HPAI H5N1)

The UK's total confirmed cases this season are up to 79 (up from 58 last month). Most cases are in England (64), with additional infections in Wales (7), Northern Ireland (4) and Scotland (4). Mandatory housing measures remain in place across England, and disease control zones and culling are underway to limit spread, driven largely by wild bird transmission. A variant linked to mammal infections has emerged in the US, it has not been detected in the UK.

Blue-tongue virus (BTV-3)

Northern Ireland confirmed its first case of bluetongue virus (BTV-3) this month. The virus was identified in two cows near Bangor, leading to the establishment of a 20km temporary control zone covering parts of eastern Northern Ireland. There have been 264 cases of bluetongue in GB in the 2025 season (since July 2025).

Lumpy Skin Disease

The French government has launched a large-scale vaccination campaign to protect 750,000 cattle in south western France against an outbreak of Lumpy Skin Disease in neighbouring Catalonia in October. The government aimed to vaccinate all 1,000 farms in the Ariège

department by the end of December 2025. This effort faces significant challenges, not only due to the scale and logistics involved but also because of growing tensions between veterinarians, who are responsible for both vaccinating healthy cattle and culling infected animals, and farmers, many of whom oppose the systematic culling approach.

Sheep and Goat Pox

Greece's feta cheese industry is facing a potential shortage due to an outbreak of sheep and goat pox (SGPP). Since August 2024, approximately 420,000 animals (5% of the national herd) have been culled. Vaccinated animals and their products face export bans. Milk production has so far remained stable as many culled animals were not dairy producers, but if the outbreak worsens, shortages of raw materials for protected designation of origin (PDO) products like feta could be disrupted. The region of Thessaly, a major cheese-producing area, has lost 160,000 animals, representing a €500 million loss and a third of its agricultural income.

Dairy

GB milk production for the 2025/26 season is forecast to reach a record 13.05 billion litres, up 4.9% from the previous year, driven by strong yields and favourable economics. Deliveries from April to November are 5.5% higher than last year, supported by cheaper feed, drought-driven increased feeding and mild weather extending grass growth. However, milk prices have recently fallen, and further declines are expected due to oversupply in both domestic and global markets. While some farmers on retail-aligned or organic contracts are less affected, overall margins are tightening amid rising costs for energy, fertiliser, labour and borrowing. High milk fat and protein levels may partially offset price drops.

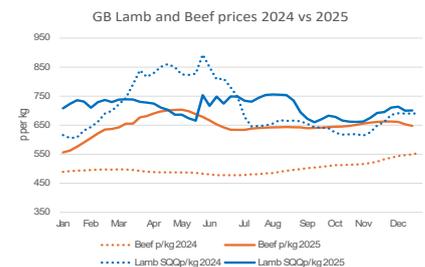
The latest Global Dairy Trade (GDT) auction showed a sharp 4.3% average price drop, marking the largest single decline since September and the eighth consecutive fall. Butter prices led the slide, falling 12.4% to US\$5,169/tonne, worsening an already weak market. Anhydrous milk fat (AMF) also fell 9.8%. Powdered milk prices declined modestly, with whole milk powder down 2.4% and skim milk powder 1.6%. Cheddar was the only product to rise, gaining 7.2%, but with limited trade. Overall, rising global milk supplies and stock levels are putting significant downward pressure on dairy prices.

Lamb & Goat

In the week ending 13 December 2025, the new season GB deadweight price fell 14p to 700p/kg, with slaughter numbers rising significantly. Weaker demand for lamb, evidenced by a 7% drop in retail purchases, is limiting price growth compared to 2024. Higher store lamb prices may pressure finished lamb prices in spring, posing a margin risk for producers.

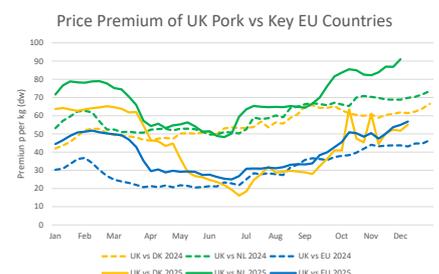
Beef

For the week ending 13 December, the all-prime average cattle price in Great Britain fell by 7p to 651p/kg, with prime cattle slaughter estimated at 32,000 head, down 5% from the same week in 2024. Prices declined across all cattle categories, marking the second consecutive week of drops after months of steady growth, likely due to easing demand post-Christmas kills. Cow prices also dropped 12p to 495p/kg, with cow slaughter increasing slightly. Beef price inflation is slowing, suggesting consumers are adjusting to higher prices, which may help support holiday sales.



Pig Meat

UK clean pig slaughterings fell 1.4% year on year in November to 867,000 head, but pigmeat production rose 1.2% to 83,000 tonnes due to higher carcass weights. Average weights reached 92.5kg, well above November 2024 levels, reflecting an autumn growth spurt, processing disruptions and pigs backing up on farms. AHDB expects record average carcass weights for 2025, raising concerns about managing supply during the traditional New Year demand lull.



Chicken & Turkey

In October, UK poultry meat production rose to 181,100 tonnes, exceeding both monthly and year-on-year levels. This increase was driven by higher broiler throughput and heavier slaughter weights, with broiler numbers at 99 million (up 4 million from September) and average liveweight rising from 2.3kg to 2.4kg compared to last year. Broiling fowl throughput dipped slightly to 2.7 million birds but remained 19% above last year, despite lighter weights (1.9kg vs. 2.4kg). Turkey slaughtering fell 21% to 500,000 birds. Broiler chick placements rose slightly by 0.3% to 99 million, while commercial layer chick placements increased to 3.7 million. Broiler breeder chick placements dropped significantly.

Egg Layer

UK farmgate egg prices averaged 148 pence per dozen in Q3 2025, up 1.8% year-on-year. Egg production reached 268 million dozen, a 1.9% increase from the previous quarter and 5.1% higher than last year.

EU egg prices have risen steadily through autumn reaching an average of 293.44 eurocents by late November (21% higher than the same period last year). US egg prices have also recovered, currently exceeding EU prices at around 3.126 euros per kg. Meanwhile, egg prices in Brazil and India remain much lower, at about 1.21 and 1.00 euro per kg, respectively.

Halibut

The 2025 Pacific halibut fishing season ended with commercial landings down 16% from last year, representing 80% of the allowable catch. Total landing across all sectors dropped 12%, marking the lowest in 100 years. Significant declines were seen across Alaska and West Coast regions, especially in western areas such as the Bering Sea.

Salmon

Norwegian salmon spot prices have dropped sharply due to oversupply and weaker demand. Meanwhile, Scottish salmon prices are rising, supported by tighter supply and strong export demand. This price gap raises concerns about potential food fraud, as cheaper Norwegian salmon might be substituted for higher-priced Scottish salmon.

Japan's processed salmon roe (ikura) production is set to fall to a record low in 2025, with Hokkaido chum roe output

estimated at just 440 tonnes. The sharp decline is tightening supplies and driving prices to unprecedented highs.

Cod

Norway, the EU and the UK have agreed on 2026 North Sea fish quotas, including keeping the cod fishery open despite ICES advising a zero catch for the southern cod sub-stock due to low biomass. They allowed a sustainable catch of 1,280 metric tons for the other cod sub-stocks, balancing conservation concerns with fishing industry interests.

Lobster

Canada's winter lobster season has started off poorly, with both low catch volumes and quality concerns. A combination of events, including weather challenges and earlier seasonal issues, has put the industry behind schedule and created difficulties for fishermen and suppliers early in the season.

Shrimp

Shrimp farming in Thailand and Indonesia has been heavily disrupted by severe flooding, causing operational challenges, reduced harvests and damage to farm infrastructure. Meanwhile, Ecuador's shrimp market faces falling farm-gate prices due to global oversupply, weaker demand and strong competition.

Fishmeal and fish oil

Global fishmeal production in 2025 is projected to reach 5.4 million tonnes, a 7% increase from 2024, while fish oil production is expected at 1.2 million tonnes, up 5%. These figures are based on data from key producing countries including Peru, Chile, Norway and others that account for about 40% of fishmeal and 50% of fish oil production. Concerns around the sustainability and environmental impact of fishmeal and fish oil remain, with efforts being made to develop alternatives such as algae-based oil and insect protein.

Animal Food

Pet-food RASFF Alerts & Recalls

Salmonella detected in Dog Chews from Poland; Happy Dog recalled Pure snack beef skin due to detection of Salmonella; Fromm Family Foods voluntarily recalled 300 cases of its Bonnihill Farms BeefiBowls Beef Recipe frozen dog food due to possible plastic contamination; Assorted dog snacks are recalled in France due to detection of Salmonella;

Excessive number of Enterobacteriaceae in pet food from Poland and India. Gold Star Distribution recalls pet food products due to rodent and avian contamination.

General

Environmental

Norwegian research by SINTEF has found that nylon aquaculture nets release five times more microplastics than nets made from other materials such as UHMWPE and HDPE. Aquaculture farms are becoming increasingly criticised for marine microplastic pollution due to heavy use of plastic gear, especially nets, ropes and coatings. Nylon nets, particularly when coated, are a significant concern. Traditional high-pressure cleaning accelerates microplastic release, but newer gentler methods like cavitation cleaning and brush grooming show promise in reducing degradation.

Climate

UK farmers growing wheat, barley, oats and oilseed rape face an estimated £828 million revenue loss from the 2025 harvest due to record heat and drought. The 2025 harvest is projected to generate £3.37 billion, a 19.7% decline from the decade average. Unlike 2024, when high global commodity prices cushioned losses, 2025 prices are near historical averages, meaning reduced volumes directly reduce income. This shortfall threatens UK food manufacturers relying on local ingredients, especially given strong consumer demand for British-sourced products. The ongoing climate-driven production challenges raise concerns about the reliability of UK-grown supplies, pushing manufacturers to consider more diverse and possibly imported sourcing conflicting with sustainability goals and food security priorities.

Illegal, unreported, and unregulated (IUU fishing)

From 8 January 2026, UK seafood exporters will be required to submit significantly expanded processing and catch information through the Fish Export Service (FES) when shipping products to the EU. The move is designed to align UK exports with tighter EU rules on illegal, unreported and unregulated (IUU) fishing that take effect two days later.

Sustainability

The Co-op will require all UK produce to be LEAF certified by January 2027 to strengthen supply chain resilience.

The rollout throughout 2026 follows consultation with its grower group, The Fresh Produce Forum, which will help oversee the process. LEAF certification promotes sustainable farming practices focused on soil health, biodiversity, and water protection. The move complements existing certifications such as Red Tractor.

EU Deforestation Regulation (EUDR)

The European Council has adopted a targeted revision of the EU deforestation-free products regulation (EUDR) to simplify its implementation and better prepare operators, traders, and authorities. The revision delays the regulation's application for all operators until December 30, 2026, with an additional six-month extension for micro and small operators. It also reduces administrative burdens by excluding certain printed products with low deforestation risk. Additionally, the European Commission is required to review the regulation's impact and administrative burden by April 2026 and may propose further legislative changes. The revision maintains the regulation's core goal of preventing deforestation linked to products in the EU market.

Animal welfare

A new policy paper 'Animal welfare strategy for England' has been published outlining the government's priorities and actions to improve welfare across farmed animals, pets and companion animals, and wild and kept wild animals. It sets out an ambitious, holistic programme focused on measures with the greatest impact, to be delivered in partnership with industry, enforcement bodies and animal welfare organisations.

A Lincolnshire turkey breeder supplying premium birds to luxury retailers has been suspended from the Red Tractor assurance scheme after undercover footage showed serious biosecurity and animal welfare breaches. Hockenhull Turkeys, which supplies farms linked to retailers such as Harrods is being investigated by Red Tractor and the Animal and Plant Health Agency.

Aquaculture

A Guardian investigation has raised serious concerns about Chile's salmon industry, the world's second-largest producer and top US supplier. It highlights dangerous labour conditions with 83 worker deaths from 2013 to 2025 (far higher than Norway's three deaths in 34 years) and weak government oversight of remote sites. The report also exposes heavy antibiotic use (351 tonnes in

2024) compared to Norway's minimal use, alongside environmental damage affecting wild species, freshwater pollution and indigenous sites. The findings may increase scrutiny of Chilean salmon industry labour and environmental standards in key markets like the US, EU and Asia.

Norwegian salmon and cod farms are facing a number of disease challenges. An outbreak of francisellosis, a severe bacterial disease in Atlantic cod, has been confirmed at an Ode cod farm. Meanwhile, infectious salmon anaemia (ISA) has been detected at a Mowi salmon farm in Flatanger. Both outbreaks have led to movement restrictions on fish and equipment to prevent further spread. Sea lice numbers are also rising sharply in northern Norway, raising concern for both farmed and wild salmon.

Cell-cultivated products

The UK's Food Standards Agency (FSA) and Food Standards Scotland (FSS) have published the first safety guidance for cell-cultivated products (CCPs), commonly known as lab-grown meat. This guidance confirms that CCPs are defined as products of animal origin, meaning that businesses must apply existing food safety regulations during the production process. The guidance outlines procedures for assessing allergenic risks and nutritional quality as part of the approval process for all cell-cultivated products.

Greece

Farmers in Greece continue nationwide protests over issues such as subsidy payments, guaranteed prices, tax relief on fuel and inputs, compensation for losses, and pension increases.

France

The FDSEA of La Manche has warned of an 'unprecedented crisis' for the region's vegetable growers. After a difficult summer, winter vegetable prices, especially for leeks and cabbages, have collapsed and no longer cover production costs. A surplus of early potatoes, combined with leftover stocks, caused prices to fall drastically, leading to losses and crop destruction. Good weather has increased winter vegetable yields, but weak consumer demand (affected by economic uncertainty and mild temperatures) means unsold produce is piling up.

Pesticides

A high-profile report by The Pesticide Action Network UK (PAN) highlights that a quarter of vegetables and three-quarters

of fruit tested contain multiple pesticides, including many linked to cancer and hormone disruption. While government monitoring found most samples within legal limits, PAN argues these limits do not consider cumulative effects or other chemical exposures, calling for stricter assessments. Nearly 30% of pesticides detected are not approved for UK farming but enter through imports. Tests by PAN reveal grapes as the supermarket fruit most contaminated with pesticides, with one sample containing residues of at least 16 different pesticides. Around 90% of grape samples had multiple pesticide residues, including harmful "forever chemicals" such as PFAS. Grapefruit, limes, bananas, sweet peppers, melons and chilli peppers also showed high levels of multiple pesticide residues.

"Forever Chemicals"

The Irish Food Safety Authority (FSAI) is considering testing food for trifluoroacetic acid (TFA), a toxic "forever chemical" found in high levels in some breakfast cereals and bread. TFA is part of the persistent PFAS group, which accumulates in the environment and food chain. While the European Food Safety Authority (EFSA) is setting safety limits for TFA, some critics argue these limits are too high.

Substrates

Europe's substrate market is tightening due to shrinking availability of the key materials peat and coco fibre (coir), with no significant recovery expected until at least April or May 2026. Growers face challenges in switching to alternative substrates, potentially leading to decreased yields. Demand for the volcanic mineral perlite has surged 50% over the last four years, outpacing supply amid the ongoing peat and coco fibre shortages.

Codex Alimentarius

The Food Hygiene Committee (CCFH55) of the Codex Alimentarius has decided to conduct a risk assessment on *Clostridium botulinum* and update its scientific advice on *Cronobacter* and Salmonella. This follows the recall by ByHeart of infant formula which has been linked to at least 39 cases of infant botulism across 18 states. Despite a recall, ByHeart products remain available in some stores worldwide and online, raising concerns especially outside the US where the only infant botulism treatment, Botulism Immune Globulin, is difficult to access. The situation has prompted calls from authorities and IBFAN for a global recall, stronger regulations, mandatory infection reporting and alignment with WHO guidelines.

IN THE NEWS: December

Eggs

Imported eggs are being investigated as the likely source of a UK salmonella outbreak that sickened 123 people between May and October 2025. The UK Health Security Agency identified a single strain of *Salmonella enteritidis* using genome sequencing, prompting a joint investigation with the Food Standards Agency. Several food businesses linked to the same distributor of imported eggs have been identified, with hygiene advice issued and further egg testing under way. Most cases were in England, particularly London, the East of England and the South East. Authorities say the outbreak is unlikely to be linked to international travel and that efforts to trace the source are continuing.

Seafood

Norwegian police are investigating Bergen-based salmon trader North Tandem over alleged illegal export practices, including document forgery, misuse of major salmon brands, false labelling and breaches of food and export regulations. The probe follows NRK reports that downgraded production fish may have been exported as ordinary salmon, allegedly using forged labels and certificates linked to other processors.

Meat

The UK Food Standards Agency's National Food Crime Unit, working with the Metropolitan Police, seized 38 kg of frozen bushmeat, including critically endangered pangolins, cane rats and porcupines, in Deptford, London. The bushmeat poses risks of carrying dangerous diseases and contaminants. Pangolins, being critically endangered, are protected by an international ban on commercial trade.

Fruit

Colombian farmers at San Martín farm in Guayatá grew the world's largest mango, officially recognized by Guinness World Records. The mango weighed 4.25 kg, surpassing the previous record of 3.435 kg from the Philippines. It measured 61.5 cm in circumference and 23 cm in height.

Dubai-style chocolate

The Food Standards Agency (FSA) has issued a precautionary warning for people with allergies to avoid Dubai-style chocolate until further notice due to potentially undeclared allergens. The FSA is reviewing product samples. Buyers are advised to purchase Dubai-style chocolate only from trusted sources.

Cocoa products

Nestlé has stopped describing Toffee

Crisp and Blue Riband as 'milk chocolate' after recipe changes reduced the cocoa content below UK legal thresholds. The bars are now labelled as 'encased' or 'covered' in a 'milk chocolate flavour coating' reflecting the increased use of vegetable oils such as palm and shea. Other products, including Penguin, Club bars, white chocolate digestives and mini rolls, have also moved to 'chocolate flavoured' labelling.

A Dhaka court jailed a supplier of Nestlé KitKat chocolate, for selling substandard products that failed government tests. The tested KitKat milk chocolate contained only 9.12% milk solids and 1.16% milk fat, both below the Bangladesh Standard Testing Institute (BSTI) minimums, suggesting adulteration and possible substitution with vegetable fats. Nestlé Bangladesh disputes the case.

Oils

Adulterated palm oil has become a serious public health threat in Lagos where the staple cooking ingredient is increasingly being mixed with harmful substances such as industrial dyes including Sudan and azo dyes, water and other contaminants to increase profits.

Portuguese authorities (ASAE) seized 2,425 litres of counterfeit olive oil labelled as extra virgin in the Porto area and an additional 14,920 litres with labelling irregularities. The operation also confiscated 1,217 fake labels used to misrepresent cooking oil as olive oil. This crackdown aims to combat food fraud amid rising olive oil prices. ASAE warned consumers to be cautious of unusually low prices and to carefully check product labels.

Italian authorities have seized over 14,000 litres of untraced extra virgin olive oil in Puglia. The seized oil lacked legal documentation and was possibly imported from Greece but sold as Italian. In addition to fraud, there have been armed thefts of olive oil shipments, increasing insurance and logistics costs for producers and transporters.

E.coli (STEC) O145

The UK Health Security Agency (UKHSA) has published a report on the UK's largest Shiga toxin-producing *E. coli* (STEC) O145 outbreak, which affected 293

people between May and November 2024. Nearly half of those infected were hospitalised, 11 developed serious complications and 2 deaths occurred. The outbreak was traced to pre-packaged sandwiches containing UK-grown Apollo lettuce from three manufacturers, who voluntarily recalled the products. The investigation involved whole genome sequencing and close cooperation between national and local authorities.

Supply chain theft

A \$400,000 shipment of lobster destined for Costco stores in the US was stolen in transit by a driver impersonating a legitimate carrier using fraudulent emails and burner phones. The shipment, picked up in Taunton, Massachusetts, never reached its destination.

Research

A new study by the Connecticut Agricultural Experiment Station found that adding iron-fortified hemp biochar to PFAS-contaminated soil can significantly reduce the transfer into food crops. The findings suggest iron-fortified biochar could be a practical soil management tool to lower dietary PFAS exposure from contaminated farmland, though further field studies are needed.



Food Safety December

Country No of Alerts

France	115
Canada	52
United States	48
Turkey	41
Belgium	41
Poland	30
United Kingdom	30
Germany	22
Italy	21
India	18
China	17
Spain	17
Netherlands	16
Ireland	15
Croatia	13
Czechia	11
Greece	11
Hungary	7
Norway	7
Ukraine	7
Thailand	6
Sudan	6
Georgia	6
Romania	6
Luxembourg	6
Vietnam	6
Egypt	5
Israel	5
Nigeria	5
Austria	5
Finland	5
Sweden	5
Russia	4
Brazil	4
Australia	4
Argentina	4
Denmark	3
Iceland	3
Morocco	3
Colombia	3
United Arab Emirates	3
Indonesia	3
Uzbekistan	3
Moldova	2
Slovakia	2
Pakistan	2
New Zealand	2
Bolivia	2
Mexico	2
Uruguay	2
Syria	2
Lithuania	2
Sri Lanka	2
Ecuador	2
Portugal	2
Singapore	2
Iran	2
Kazakhstan	2
Kenya	2
Chile	2
Rwanda	1
Cameroon	1
Kosovo	1
Slovenia	1
Belarus	1
Ghana	1
Serbia	1
Bangladesh	1
Philippines	1
Peru	1
Albania	1
Switzerland	1
Uganda	1
North Macedonia	1
Costa Rica	1
Dominican Republic	1
Algeria	1
Japan	1
Afghanistan	1
Paraguay	1

SUMMARY

- There were **648 Red**, **42 Amber** and **6 Green** totalling **696 safety alerts and product recalls*** in December.
- The majority of alerts were for bacterial pathogens and natural contaminants (30.7% and 1% respectively). Pesticides were third with 11.4%.
- 214 Bacterial pathogen alerts (60% Salmonella, 28% Listeria); E.coli accounted for 6 % of which 50% were STEC.
- 80 Natural contaminant alerts (46% Aflatoxin, 31% Ochratoxin and 5% Ergot).

Top 3 alerts by commodity

- Ingredients:** Nuts & seeds, herbs, spices & rice, sauces & condiments
- Protein:** Chicken, pork, beef
- Produce:** Fruit, dried fruit, vegetables

Top 3 number of alerts by county of origin

- France:** Fish, pork, sausage.
- Canada:** Nuts & seeds, chicken, ready meals.
- USA:** Supplements, nuts and seeds, ready meals.

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

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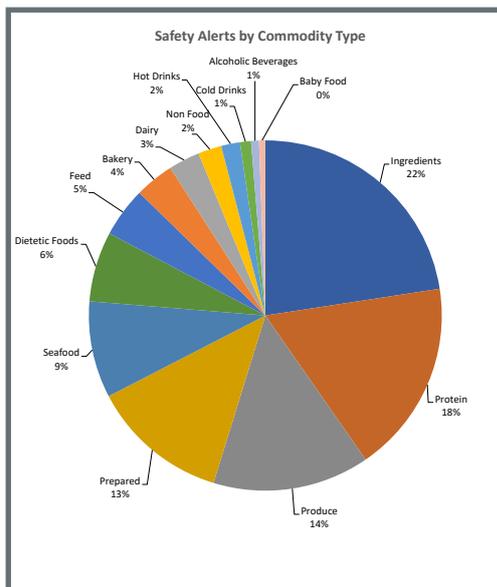
Contact us

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

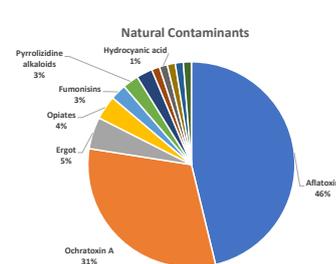
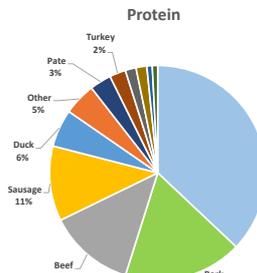
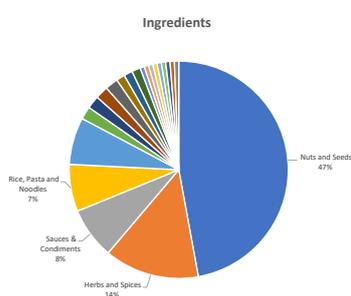
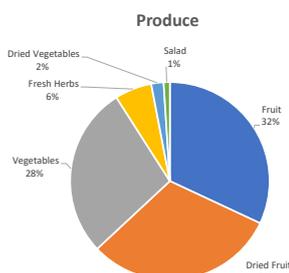
+44 (0)1603 274456

info@foodforensics.co.uk

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

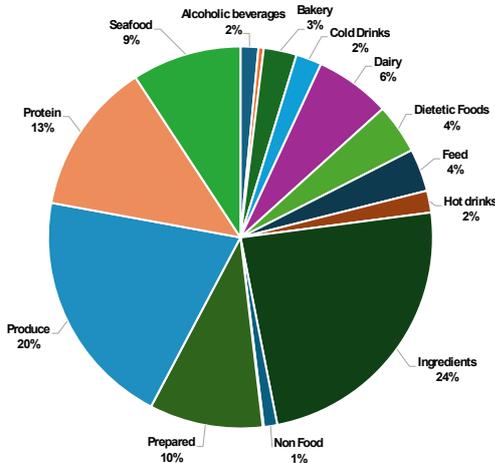


Total 696

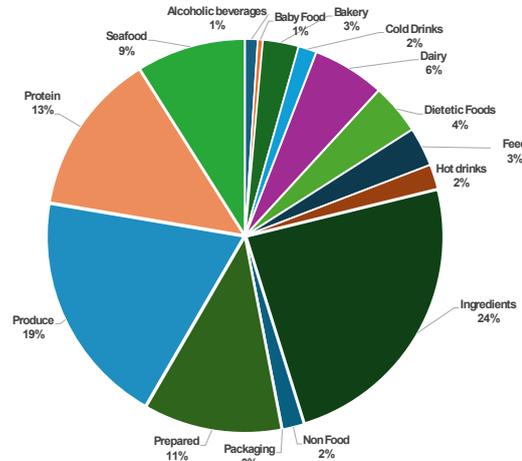


Knowledge Base Trends

Product Category Issues 2024

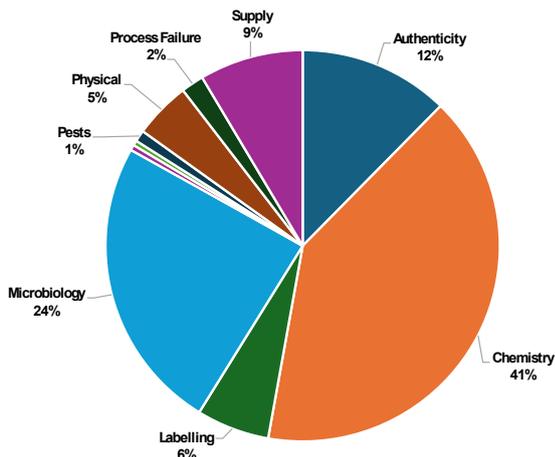


Product Category Issues 2025

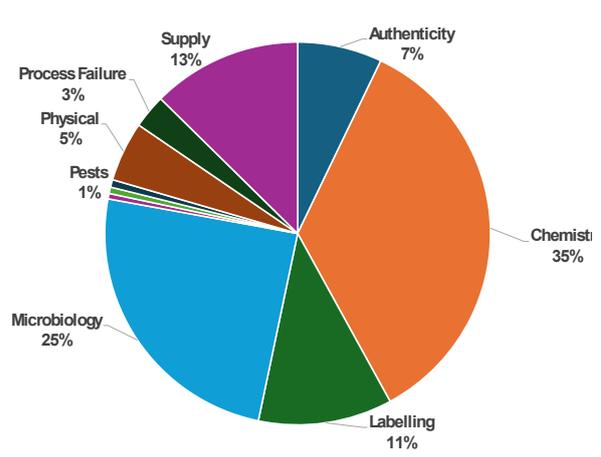


Across categories the pattern was very similar in 2025 to 2024.

Category Reported Issues 2024

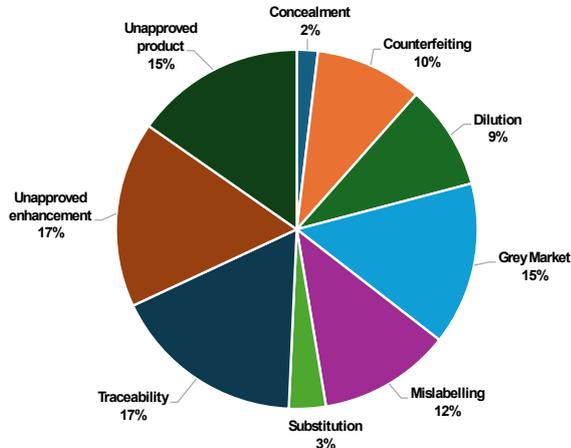


Category Reported Issues 2025

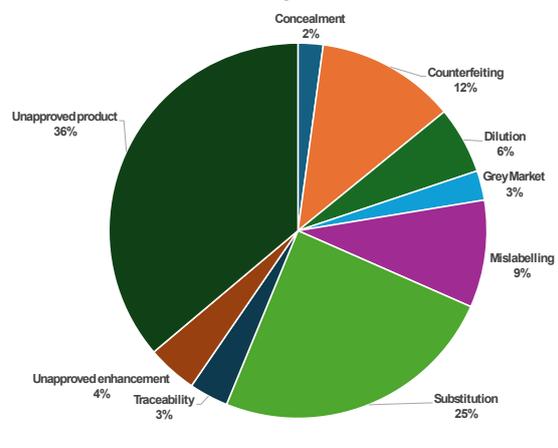


The category pattern saw a reduction in issues logged as authenticity with an increase in those linked to labelling and supply during 2025. Labelling were primarily linked to incorrect labelling of allergens, where as supply was weather related availability.

Authenticity Issues 2024



Authenticity Issues 2025



During 2025 the number of authenticity issues classed as substitution increased compared to the previous year, those linked to traceability reduced. There was a significant increase in issues linked to unapproved products - many linked to dietetic foods.

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

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