Food Forensics Risk Newsletter

December 2025

HIGHLIGHTS

- Shortage of Moroccan tomatoes expected to impact Europe by February 2026.
- China faces a large surplus of tomato paste following forced labour and mislabelling concerns.
- Avian influenza (H5N1) cases continue to grow across the UK with mandatory housing orders in force for England and Wales, even for 'free-range' birds.
- Spread of sheep and goat pox in Greece threatens supplies of feta cheese.
- US set to ban Irish imports of farmed salmon from 1 January 2026 following failure to meet equivalence to US legislation requirements.
- Animal welfare in aquaculture industry in the spotlight after Mowi Scotland loses Royal Warrant.
- 48th session of the Codex Alimentarius Commission brings new guidance including first ever standard for fresh dates.

Produce

Citrus

The Egyptian Export Authority Council has set December 15, 2025, as the official start date for the orange export season which is later than last year's December 1 start. The delay aims to ensure better fruit colouring, improve quality control and stabilise prices by preventing early exports of under-coloured oranges.

Spain is entering the 2025/26 citrus season with its smallest crop in 16 years but with good quality fruit. Production is also down in key competing countries such as Turkey and Morocco. Early clementine volumes are limited due to spring weather issues. Oranges, mandarins and lemons are all forecast to see notable production declines, while grapefruit is the only category expected to increase.

A nine-day strike by agricultural workers in Adana, Turkey's key citrus region, halted mandarin harvesting and caused orchard prices to collapse. With fruit left unpicked, quality deteriorated, disrupting exports to Europe and Russia and pushing more damaged fruit into the domestic market. Harvesting, which should have finished by late October, extended into mid-November.

In Brazil, exporters began the 2025/26 orange juice season optimistically, aided by the removal of US tariffs on Brazilian juice and higher orange production in Sao Paulo. However, weaker-than-expected demand from Europe between July and October has kept exports low.

Mexican lime supply remains steady but recent rains are causing quality issues, especially for larger sizes. These larger limes face shorter shelf life, lighter colour and other defects, making them cheaper than smaller, better-quality sizes which are in lower supply and priced higher. Rain has also delayed harvesting.

Top Fruit

Turkey's apple sector is facing a sharply reduced harvest, with production down about 40-70% after severe frost hit Central Anatolia earlier this year. The shortfall has made it difficult to meet domestic demand, prompting the government to halt all apple exports despite strong interest from markets such as India and Europe. The shortage has pushed prices to nearly double last season's levels.

The World Apple and Pear Association (WAPA) revised its 2025/26 European production forecast, now estimating around 11 million tons of apples and over 1.8 million tons of pears - moderate increases from August but still below full potential. Improved late-summer weather boosted fruit size and colouring, with notable production rises in Poland, Germany, Belgium, the Netherlands and France. Pear output increased in some countries but declined slightly in Italy. Despite a tough spring, better conditions led to higher yields overall.

Soft Fruit

Global blueberry demand continues to grow strongly, led by North America and Europe, according to RaboResearch's Blueberry Update 2025. US per capita consumption now exceeds 1.3 kg a year, while EU demand remains firm despite volatile prices and uneven supply. China has become a major producer and exporter, and demand is rising in emerging Asian markets such as India and Thailand. Peru remains the largest supplier, with Morocco expanding rapidly and poised to overtake Chile and Canada. However, water, land and labour constraints could limit Morocco's growth. In the EU, rising costs and regulations are curbing production.

The Spanish Ministry of Agriculture, Fisheries and Food has authorised the limited use of 100% garlic extract-based nematicides for strawberry cultivation in Huelva until February 2026. This exceptional approval addresses nematode and fungal issues in the region's strawberry fields.

Stone Fruits

South African nectarine exports are expected to rise 18% in the 2025/26 season, driving overall stonefruit export growth of 6%. Plums and peaches will see modest increases (3%), while apricot exports are forecast to decline slightly (3%). The growth in nectarines is supported by favourable weather and increased planting of higher-yielding varieties, with nectarine hectares up 26% over five years.

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Banana & Plantain

Ecuador's plantain industry is facing a major production drop of 30-35% due to bacterial moko disease. This has sharply reduced plantain exports and driven prices to record highs. While higher prices benefit producers temporarily, there are concerns about demand falling in key markets such as the US.

Exotics

This year's Peruvian mango season is expected to see a 15% drop in production due to irregular flowering, following last year's record exports of around 280 million kilos. Despite lower yields, fruit quality and size may support higher prices. While most mangoes are exported fresh, there is a push to develop processed products to reduce waste and boost local jobs.

Salad Crops

From November 2025, the use of the pesticide Movento to control aphids is banned in the EU. Without effective alternatives, growers report heavy crop losses particularly for lettuces. Research into resistant varieties and biological controls is ongoing, but solutions remain limited. Processors are adapting with improved washing techniques, but fresh market acceptance of aphids is uncertain. Agricultural groups have urged the emergency approval of spirotetramat to protect food security and give time for new solutions. The situation also threatens other crops including cabbage and pears.

Early-season vegetable production in Morocco's Souss Massa region is down sharply after summer weather damage left growers short of resilient plants and effective crop-protection tools. Producers report declining volumes of peppers and tomatoes, with bell pepper prices hitting record highs and tomato prices rising with limited exports. Moroccan growers expect shortages to reach both European markets by February, driving prices higher. Recent flooding in Dakhla is adding pressure by reducing availability of tomato varieties that typically fill gaps during shortages.

The Spanish pepper crop is facing increased damage from the pest *Thrips parvispinus*, first detected in 2020. This season's impact is worse than last year, reducing the proportion of first-class peppers from typically around 85-88% to an expected 60%. Almeria's Technical Commission is proposing a biological shutdown of greenhouses to combat the spread of *Thrips parvispinus*. The shutdown would involve a complete pause in production lasting at least 20 days, with greenhouses cleared of crops and debris. Proposed shutdown dates would vary by area from May to July.

UK glasshouse growers warn that a 94% rise in electricity network charges from April 2026 could cause widespread business failures and higher food prices. The British Tomato Growers' Association and the Cucumber and Pepper Growers' Association highlight that their sector's exclusion from the Energy Intensive Industries (EII) exemption scheme is a major issue. Despite a potential 90% discount, rising energy costs remain financially unsustainable and warn that failure to act risks reduced domestic production, business closures and increased reliance on imports.

Potatoes

The UK potato market is shifting its attention to quality as the 2025/26 season advances and stocks remain high. Prices had been falling through much of the year due to heavy contracting and limited free-buy trade, but quality problems, especially bruising in Maris Piper, are now emerging and pushing prices up slightly. Some quality concerns are also being reported in white packing potatoes, though high availability has kept prices stable.

Onions

At the 2025 Euronion congress in the Netherlands, European and international onion growers reported strong global yields but raised concerns over rising disease pressures, especially fusarium, mildew and thrips, and the loss of crop protection products due to stricter regulations, notably Denmark's PFAS ban. Key issues include increasing fusarium in fields and storage, limited pesticide options, and climate-related stresses impacting yields differently across regions.

Ginger & Garlic

Egypt has sharply increased its garlic exports to Spain in 2025, sending over 3,000 tons in the first eight months - five times more than last year and 50% above the past decade's total. This surge comes as Spain, Europe's top garlic producer, faces reduced cultivation due to drought, labour shortages and rising costs, leading to a 30% drop in production. The lower price of Egyptian garlic makes substitution a risk.

Shandong's ginger crop benefited from stable weather and balanced summer rainfall, leading to healthy growth and an expected 20% yield increase compared to 2024. However, prolonged rain near harvest caused persistently wet soils, reducing starch content and making ginger more fragile and less suitable for long-term storage, increasing the risk of decay and mould.

Tomato paste

China faces a large surplus of tomato paste after exports to Italy dropped by around 76%, triggered by forced labour concerns in Xinjiang and a scandal over misleading Italian labelling. This has left China with 600,000-700,000 tonnes of unsold paste, forcing a halving of planned 2025 processing volumes. Xinjiang, a major low-cost production hub linked to forced labour allegations, saw its exports banned by the US in 2021. Italian producers see the decline in Chinese imports as a win for domestic farmers. However, with a surplus of Chinese tomato paste, substitution and mislabelling continue to be real risks.

Herbs and spices

At it's 48th session in November 2025, the FAO-WHO Codex Alimentarius Commission made a landmark decision with global impact on the spice industry by adopting new maximum levels (MLs) for lead in spices and dried culinary herbs. Global limits were set at 2.5 mg/kg for lead in spices, including dried bark e.g., cinnamon, and 2.0 mg/kg for lead in dried culinary herbs. These limits will be incorporated into the General Standard for Contaminants and Toxins in Food and Feed (CXS 193-1995).

Nuts

Kashmir has produced a record almond harvest this season, but the strong output is tempered by concerns over long-term sustainability with orchards being converted for commercial development. Meanwhile, California's almond acreage declined for the fourth year in a row in 2025, falling to 1.51 million acres, down from 1.53 million in 2024.

Portugal's almond production is expected to decline significantly in 2025 due to rain and cold weather during the critical flowering and pollination period in March-April, with estimated losses averaging around 50% and ranging from 25% to 75%. Walnut production is expected to be stable to good. Portugal is the second-largest almond producer in Europe.

Nut production in Spain is expected to rebound strongly in the 2025/2026 season after two years of decline due to frost and drought. Almond in-shell production could see a 24% increase

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from last season and 8% above the five-year average. Hazelnut and pistachio production forecasts also show significant growth. Almonds represent 90% of Spain's nut export value.

The walnut harvest in Greece is showing a 40% increase over last season. Quality is reported to have improved, with a higher kernel-to-shell ratio (40 to 43%) and better nut size.

The International Nut and Dried Fruit Council's 2025/26 hazelnut forecast shows a sharp drop in Turkey's output, down 36% due to spring frosts and droughts. Turkey provides approximately 70% of the world's hazelnut supply. Italy's production is also expected to fall 25% amid bad weather and pest issues. In contrast, Chile and the US anticipate significant increases, with Chile's crop doubling to 120,700 tons and US output rising 19% to 106,000 tons. The tight supply has triggered uncertainty across confectionery industries, prompting major buyers to explore alternative origins including Chile and the US, while warning of potential shortages in products such as hazelnut spreads.

Georgia's hazelnut industry faces a serious threat from tortoise beetles and hazelnut blight, which has already destroyed approximately 10% of orchards and could affect up to 30% next year. The disease, spreading rapidly in Samegrelo and Guria regions, requires costly treatments that many farmers cannot afford.

Oregon is set for a strong hazelnut harvest this year, with output expected to reach a record 20% higher than last year. Expanded plantings of newer disease-resistant varieties have driven growth, though recent mutations of Eastern Filbert Blight are beginning to challenge that resistance. Oregon now competes with Chile as the world's second-largest producer after Turkey.

Coconut

In early November, Typhoon Fung Wong severely disrupted the Philippine coconut industry, hitting key producing areas. Coconut farms suffered fallen trees, logistical breakdowns, infrastructure damage and extended power outages, compounding earlier typhoon impacts.

Cereals

The International Grains Council raised its 2025/26 global wheat production forecast to 830 million tonnes, up from last year's 799 million. UK wheat imports for July-September were above the 10-year average but below last year's levels, reflecting a steadier start to the season. The AHDB forecasts total UK wheat imports for 2025/26 at 2.2 million tonnes, down nearly 870,000 tonnes from 2024/25, as a larger domestic crop reduces reliance on imports.

UK maize imports in September rose 52% from August, driven by record Brazilian harvests, but are 30% lower year-on-year for July-September. Feed demand is strong, with a 9.9% increase in maize use in compound feed July-September, potentially supporting imports later, especially in the poultry sector.

Corn prices in China have hit their highest level in over two months as buyers compete for high-quality grain after heavy rain damage. Recent extreme rainfall in northern provinces, which produce over 30% of China's corn, has disrupted harvesting and raised concerns about output despite forecasts of a record crop.

Coffee

Global coffee markets are feeling the influence of tight inventories, shifting tariffs and rising production forecasts. Since mid-November, arabica futures have traded at near lows of $4 per pound after the US removed a 40% tariff on Brazilian agricultural goods, excluding instant coffee. Brazil supplies about a third of US demand. Favourable weather forecasts with heavy rainfall in Brazil's coffee regions support crop development and weigh on prices.

Vietnam's robusta exports have risen 13%, with production expected to grow 6–10%, adding downward pressure on prices. However, heavy rains have delayed harvesting in Dak Lak, Vietnam's largest coffee-growing province, threatening crop damage and reduced output in the world's top robusta producer.

Cocoa

Cocoa futures dropped to around $4,900 per tonne, their lowest since January 2024, driven by improved supply from West Africa and expectations of a larger global surplus. Ivory Coast cocoa arrivals have exceeded 100,000 tons weekly for three weeks, supported by favourable weather and strong carryover stocks. The EU's delayed deforestation regulations and a US executive order exempting cocoa from reciprocal tariffs have also contributed to the price decline.

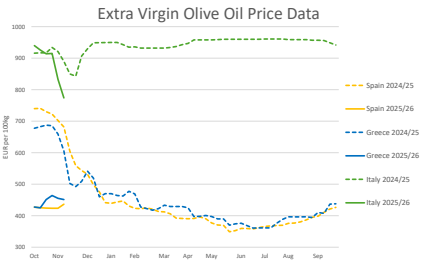
Tea

The change in US tariffs on tea imports has disrupted the flow of tea into the US market (2nd largest tea importing country in the world after Pakistan), causing uncertainty and financial strain for producers and growers in key tea-growing countries. Tea, historically linked to American trade disputes like the Boston Tea Party, has long been mostly tariff-free until recent years. In July 2025, tariffs averaged over 12% on tea imports. Despite a recent announcement in November by President Trump to reduce tariffs on tea imports, the impact of tariffs has been damaging to both tea producers and importers.

Olives & Olive Oils

Global olive oil production is expected to fall by nearly 10% in the 2025/26 season (USDA production forecast). The decline reflects the olive tree's natural alternate-bearing cycle, compounded by ongoing climate pressures such as drought and erratic weather. Spain remains the key driver of global supply, while Italy is set for only modest improvement as producers continue to face disease impacts and weather volatility. Although output will be lower, the more stable market suggests prices will stay firm but avoid the extreme spikes seen during previous shortages.

The prices of both Spanish and Greek EVOO continues to track below their 5-year average, whilst despite the fall in Italian EVOO price it still remains 141.2 €/100g above its 5-year average. The price differential continues to make substitution a risk.



Protein

African Swine Fever (ASF)

Cases of ASF continue to arise with the most recent outbreaks occuring in the largest pig-breeding region of South Korea and Lagos. In the UK, MPs have warned that the threat from illegal meat imports puts UK food and farming at risk.

Swine Dysentery

Data from the GB Pig Surveillance Dashboard shows confirmed cases of the bacterial disease swine dysentery increased from eight in 2021 to 54 in 2024, with further cases reported in 2025, including one in Scotland. AHDB and industry specialists are urging producers to tighten biosecurity measures.

Sheep and Goat Pox

A fast-spreading outbreak of sheep and goat pox is devastating Greek farms and threatening supplies of the country's feta cheese. Over 1,700 cases have been recorded since the disease first appeared in 2024. In total, more than 417,000 animals have been culled—about 4–5% of the national herd. A full movement ban would halt milk deliveries to dairies.

Lumpy Skin Disease (LSD)

Following the confirmation of LSD on a breeding farm in Catalonia in early October, a program of culling and vaccination was carried out to contain the outbreak.

Avian Influenza (HPAI H5N1)

The UK's total confirmed cases this season are up to 58 (up from 36 last month). Most cases are in England (46), with additional infections in Wales (7), Northern Ireland (4) and Scotland (1) reporting its first case on 12 November. 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.

Dairy

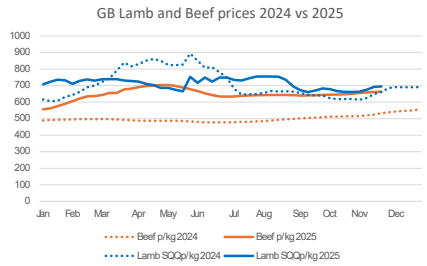
UK milk production is up 6% year-on-year, driven by strong margins from high milk prices and low feed costs. Similar growth is seen globally, especially in the EU and US.

In the US, expanded processing capacity, particularly in cheese, has spurred herd growth, pushing milk output up 3.2% in August. However, oversupply is depressing commodity prices, as domestic and export demand remain flat.

Globally, milk production is outpacing demand, leading to rising inventories and falling prices. While lower retail prices may eventually boost consumption, near-term outlooks suggest continued market pressure through 2026.

Beef

UK beef imports slipped 1% year-on-year to 223,000 tonnes in the first nine months of 2025, as lower volumes from Ireland were offset by sharp increases from Australia, New Zealand and Brazil. Overall, global beef supply is tight, supporting strong prices, though short-term risks from trade disruptions persist. GB beef prices are currently approximately 130p/kg



higher than the same period last year. The differential between GB beef and lamb prices currently stands at approximately 32p/kg.

Lamb & Goat

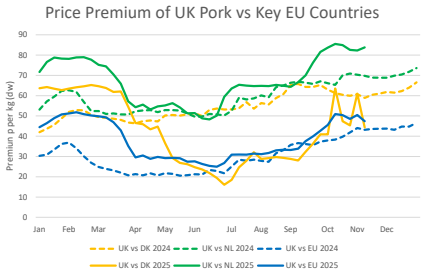
UK lamb exports grew 15% in the first nine months of 2025, reaching 68,300 tonnes, supported by strong fresh lamb demand in France, Belgium and the Netherlands, as well as rising offal exports to markets such as Côte d'Ivoire. This export growth has helped support domestic prices despite somewhat limited UK supplies.

UK lamb imports rose 7% to 65,100 tonnes, driven mainly by a nearly 40% increase in Australian shipments due to expanded tariff-free access and diversion from Asian markets. Imports from New Zealand remained steady, while Irish imports fell 12% due to tighter production and price pressures. Frozen sheep meat dominates imports, particularly from New Zealand and Australia, while fresh imports declined.

Pig Meat

The AHDB Q3 pork production summary for GB indoor and outdoor breeding herds showed average net pig margins in the UK nearly doubled to £13 per head in Q3 2025, driven by a sharp fall in production costs - mainly feed costs which fell to their lowest level since 2020. Pig prices rose slightly in Q3, with the SPP averaging 207p/kg, supporting margins of £13.27 per head, up from £7 in Q2. The sector has now seen positive margins in nine of the past ten quarters, following heavy losses in 2021-22. However, the SPP has declined by 4p since late September, likely reducing margins in Q4 for producers.

AHDB has lowered its 2025 UK pigmeat production forecast to 968,000 tonnes, (1.5% increase from 2024) down from an earlier prediction of 988,000 tonnes. This revision follows a 2.4% decline in production during Q3 due to lower slaughter numbers and lighter carcass weights caused by a hot, dry summer. AHDB expects modest growth in Q4 production driven by heavier carcasses, though slaughter numbers are forecast to remain flat due to processing disruptions and seasonal demand.



Chicken & Turkey

UK poultry meat production rose nearly 3% in September, reaching around 178,000 tonnes. Broiler slaughterings edged up 0.7% to 95.9 million birds, while broiling fowl numbers increased sharply. Broiler chick placings grew 8.8% and layer chick placings rose 8.7%, reflecting steady demand. In contrast, turkey poult placings and slaughterings both fell by about 10% ahead of the Christmas season.

UK poultry meat production has continued to grow in 2025 despite challenges from the switch to a lower broiler stocking density of 30kg/sq m. In the first 10 months, output rose 1.2% to 1.74 million tonnes, recovering from a slight decline in Q1. Broiler production increased by 1% to 1.56 million tonnes, with chick placements up 1.1% over the past year. After a dip in chick numbers from March to June, levels stabilised, with total chicks in the last three months matching last year at 293 million. Turkey placements remained steady in October but down 11.7% over the past year.

Egg Layer

UK egg production hit a new record in Q3, reaching 268 million dozen eggs - a 6.3% increase year-on-year and the seventh consecutive quarter of growth. Shell eggs rose by 11.4 million dozen to 241 million, while processed eggs increased by 1.6 million dozen to 27 million. Year-to-date production is up 4.6%, with a 9.6% rise over two years. All production systems grew except colony eggs, which fell 12% to 45.9 million dozen, now just 17.3% of packing station throughput. Free-range eggs (excluding organic) rose 9% to 188.3 million dozen, making up 70.7% of throughput. Organic eggs increased 12%

to 10.1 million dozen, and barn eggs grew 32% to 21.9 million dozen.

EU egg prices have risen sharply this autumn, up 6.7% in the past month and up 25% higher year-on-year. The UK remains the biggest buyer of EU eggs, taking 90,000 tonnes in the first seven months of 2025, while EU egg imports, mainly from Ukraine, also increased.

Broiler prices in the EU have stayed stable at around 300 euro-cents/kg, about 7% higher than last year. In comparison, US broiler prices have dropped to roughly 204 euro-cents/kg, while Brazilian prices remain lower still at around 132 euro-cents/kg.

Cod and Pollock

Seafood Europe's EU Seafood Supply Synopsis 2025 Report warns that the EU processing sector is facing growing pressure due to reduced availability of wild-caught whitefish, especially cod and Alaskan pollock. Supplies have tightened due to lower quotas and reduced imports from Russia, while demand remains high. EU processors are increasingly relying on other seafood sources to fill the gap making substitution a risk, including farmed whitefish and rising imports of species such as shrimp from Ecuador.

Salmon

Irish farmed salmon exports to the US will stop on 1 January 2026 after US authorities ruled that Ireland's Wildlife Act does not meet required equivalence with American legislation. The decision, issued by NOAA Fisheries, also blocks exports of Irish farmed spiny lobster. From the same date, shipments of related seafood products must carry a Certificate of Admissibility confirming they do not contain these items. Other Irish seafood exports remain unaffected, but the SFPA has advised exporters to prepare for the new rules.

Anchovy

Peru's Ministry of Production has raised the total allowable catch (TAC) for the North-Central anchovy zone to 1.63 million metric tons, up from a provisional 500,000 MT set earlier in November. This increase follows a scientific report from the Peruvian Marine Institute (IMARPE) and reflects improved stock assessments after previous reductions from earlier TACs of 3 million MT and 2.51 million MT in 2024. Peru's anchovy fishery remains the world's largest, making this adjustment significant for the global fishmeal and fish oil markets.

Morocco has announced its first-ever temporary fishing ban on small pelagic species, introducing a biological rest period to help protect these fish stocks. This marks a significant step in sustainable fisheries management for the country. The ban affects fishing vessels operating in Essaouira and aims to allow fish populations to recover. Further details on the duration and enforcement of the ban are expected.

Fishmeal

Fishmeal shortages are expected by 2028, prompting calls from aquaculture and feed industry stakeholders to boost insect-based feed production. They urge regions like the EU to ease regulatory barriers and follow Asia's lead, where insect feeds, particularly those using black soldier fly larvae, are rapidly expanding. This shift aims to support the projected 12 million metric ton growth in farmed species like salmon and marine finfish by 2033, ensuring sustainable feed supplies for the industry.

Animal Food

Pet-food RASFF Alerts & Recalls

The Canadian government has recalled certain Puppy Love and Puppy World raw pet treats due to possible *Salmonella Oranienburg* contamination, which can cause illness and cross-contamination risks. The recall affects various bag sizes of beef, chicken, and lamb lung treats sold nationwide. Between February and October 2025, 12,630 units were sold, with six reported illnesses linked to these products. Initially, no common supplier was identified and no recall was issued, until now. The investigation continues.

RASFF alerts - Salmonella in Pig Ears Dog Treats From Poland; metal in duck meat cubes from the Netherlands; bones in cat food from the Czech Republic.

General

Environmental

Juvenile Atlantic salmon numbers in the River Frome have fallen to their lowest level in more than 20 years, deepening concerns the species could vanish from UK rivers within decades. Scientists warn the decline mirrors a wider collapse in wild salmon, whose UK populations have dropped approximately 80% in 40 years. Researchers link the decline to worsening freshwater conditions, including algal blooms driven by nutrient pollution, and fine sediment from eroding banks and farmland smothering salmon eggs.

A major escape of around 75,000 farmed salmon from Mowi's site in Upper Loch Linnhe during Storm Amy has prompted serious concern from the Highland Council's Lochaber Committee. Councillors warned the incident could harm already-endangered wild salmon through genetic mixing, disease or sea-lice spread and competition in nearby river systems. There is longstanding criticism of weak regulation, poor transparency and the lack of meaningful penalties in Scottish aquaculture.

Climate

A new UN dataset warns climate change will sharply reduce global agricultural productivity by the end of the century, threatening food security and hitting poorer countries hardest. Over 90% of 176 countries studied are expected to see declining yields in staple crops like maize, rice, wheat and soy, even with adaptation efforts. Low-income regions in sub-Saharan Africa and parts of Asia are particularly vulnerable due to reliance on rainfall and limited resources. Major exporters, including large wheat and soy producers, could face up to 40% yield declines under severe warming, risking global food market volatility.

The National Drought Group has warned that drought conditions across England are likely to continue into 2026, despite recent rainfall. Following the driest spring in 132 years and the hottest summer on record, reservoirs remain critically low, averaging 63% full compared to the usual 76%, with some in the south below 30%. The Met Office says England needs 482mm of rain by March to recover, but only two months this year have met that level.

Conservation

A young humpback whale found entangled in crab fishing gear was euthanised on November 16 near Yachats, Oregon, reigniting concerns about the impact of the state's Dungeness crab fishery on endangered marine species. This incident underscores ongoing challenges in balancing commercial fishing activities with the protection of vulnerable marine wildlife.

A study involving DNA barcoding of shark-based pet treats in Thailand revealed that most shark cartilage and whole-dried shark products sold as pet snacks come from species listed on the IUCN Red List and CITES Appendix II, indicating conservation concerns and regulated

trade. Most products lacked clear species labelling, origin or catch information, highlighting weak supply chain traceability.

Amazon Soy Moratorium

The Amazon Soy Moratorium, a ban since 2008 on selling soy grown on recently deforested land, has helped reduce deforestation and is supported by major UK food companies and environmental groups. However, Brazilian farmers and some politicians are pushing to overturn the ban, arguing it restricts agricultural growth and is anti-competitive. Critics warn that lifting the moratorium would trigger widespread deforestation, threatening the Amazon's fragile ecosystem, which is already nearing a tipping point due to ongoing forest loss and climate change. The ban has been credited with historically lowering deforestation rates, although recent years have seen increases under past administrations.

EU Deforestation Regulation (EUDR)

EU governments have agreed a negotiating mandate to revise the deforestation-free products regulation (EUDR), opening talks with the European Parliament on simplifying the rules and delaying their application. The Council supports a one-year postponement to 30 December 2026 for large companies, with small and micro businesses given until June 2027, citing ongoing concerns over IT-system readiness and administrative burdens. The upcoming negotiations will determine whether the EUDR proceeds next year in simplified form or is pushed back further, amid wider global attention on deforestation with COP30.

Animal welfare

Cranswick has launched a plan to improve animal welfare across its pig farming operations following a veterinary review triggered by undercover footage showing unacceptable practices at some of its farms. The plan includes standardising farm procedures, enhancing staff training, increasing AI-enabled CCTV monitoring, creating welfare officer roles within a new Welfare Hub, integrating welfare improvements into the company's ESG programme, and investing in farm upgrades over three years.

Aquaculture

Mowi has lost its Royal Warrant after 35 years, following animal welfare concerns at one of its salmon farms in Skye. Undercover footage showing alleged mistreatment of fish led to the RSPCA suspending the site and sparked wider criticism from environmental groups. The decision comes amid broader scrutiny of Mowi's operations, including recent large-scale fish escapes during storms. The move underscores growing pressure on the aquaculture sector to meet higher welfare and transparency standards.

Tesco has halted supplies from a Bakkafrost Scotland salmon farm after undercover footage alleged fish with severe sea-lice infestations were left in a pen that should have been emptied. Animal Equality UK claimed this breached welfare and legal rules. RSPCA Assured is conducting its own investigation.

Chile has introduced a bill to ban octopus farming, recognising octopuses as sentient and highly intelligent animals. If approved, it would make Chile the first country in Latin America to prohibit intensive octopus aquaculture. The proposal aligns with a growing international push against octopus farming, following similar bans and legislative efforts in places like Washington State and California.

Illegal, unreported and unregulated (IUU) seafood

According to a new report from the E.U.'s IUU Fishing Coalition, the European Union is failing to stop illegal, unreported, and unregulated (IUU) seafood from entering its market. Despite having some of the world's strongest anti-IUU rules, the coalition says weak and inconsistent border checks continue to let illicit products slip through.

Human trafficking

Over 100 minors were rescued from a mushroom-processing facility in Raipur (India), following intervention by the National Human Rights Commission (NHRC) and a complaint by the Association for Voluntary Action. Many children, mostly tribal minors from several states, were found working long hours (12-15 hours daily) in hazardous conditions involving chemical exposure, bonded labour, and below minimum wages. They were housed in cramped spaces with restricted movement. The NHRC urged greater accountability of factory management and better enforcement.

Worker's Rights

Banana workers in Costa Rica received compensation after a complaint filed by Oxfam Germany and the trade union SITRAP under Germany's Supply Chain Law, citing low wages, pesticide spraying and union discrimination at an Aldi supplier. Following the complaint, Aldi engaged with the union and supplier, investigated the issues, and facilitated negotiations, resulting in payments to affected workers. Oxfam Germany has also criticised other retailers including Rewe and Edeka for not acting on similar incidents and has filed complaints against them.

UK Biosecurity

The UK government has been criticised for a lack of urgency in tackling illegal meat imports after rejecting or only partially accepting most recommendations from a parliamentary report warning of an "illegal meat crisis". The Environment, Food and Rural Affairs (EFRA) Committee had accused ministers of "sleepwalking" into a potential food safety disaster and urged stronger border controls, more resources at the Port of Dover and a coordinated strategy to curb smuggling. In its response, Defra acknowledged the risks but deferred several actions until after post-Brexit sanitary and phytosanitary (SPS) negotiations with the EU are completed possibly not before 2027. It rejected calls to create a dedicated taskforce or to immediately expand enforcement powers and funding for port health authorities, though it agreed to improve intelligence-sharing and take a strategic approach.

Codex

The 48th session of the Codex Alimentarius Commission (CAC48), held November 10-14 2025 in Rome, adopted key revisions and new standards. Updates were made to the General Standard for Food Additives, including revoking and adding certain provisions, especially concerning colour additives. The Code of Practice for reducing aflatoxin contamination in peanuts was revised with new guidance on harvesting, feed use and roasting effects. Maximum lead levels were set at 2.5 mg/kg for cinnamon and 2.0 mg/kg for dried culinary herbs. New guidelines were adopted to help laboratories monitor the purity and stability of pesticide reference materials beyond expiry dates. CAC48 also introduced the first-ever international standard for fresh dates, aiming to ensure quality and safety while facilitating trade.

Fertilisers

Geopolitical tensions between China and Russia have triggered new export restrictions from China, causing a sharp rise in global fertiliser prices. This disruption in fertiliser supply chains is increasing costs for farmers worldwide and risks driving up food prices for consumers. With China and Russia dominating fertiliser exports, their actions heavily influence global food production costs.

IN THE NEWS: November

Seafood

The US Congress has banned Chinese seafood from school lunch programs addressing concerns about food safety and supply chain transparency. It has also created a new seafood liaison position within the USDA to support the domestic seafood industry.

Norway's Seafood Business industry group is calling for tougher action against illegal fish exports after an investigation revealed farmed fish not meeting export standards are being sold illegally. The group warns that document forgery and organised crime threaten confidence in the sector. Inspections are seen as too rare, penalties too light and the risk of being caught too low.

Scottish salmon has received official Protected Geographical Indication (PGI) status from the European Commission, following UK government approval. This designation means only salmon farmed in Scotland's coastal mainland, Western Isles, Orkney and Shetland can be labelled as "Scottish salmon" within the EU, preventing foreign salmon processed in Scotland from using the name.

Meat

A man was sentenced on 14 November 2025 following a joint investigation by the UK National Food Crime Unit (NFCU) and Redbridge Council. He received a 16-month prison sentence suspended for 18 months, 250 hours of community work and £3,000 in costs after pleading guilty to eight food safety offences related to the illegal slaughter and sale of "smokies".

'Free Range'

A recent change in UK law allows chickens, turkeys and other poultry to be sold as 'free range' even if they have spent their entire lives indoors. This shift, prompted by repeated bird flu outbreaks, means birds can be kept inside under government lockdowns without losing the free-range label, despite not having access to outdoor runs. Consumer bodies call this misleading, as many shoppers pay more expecting genuine outdoor access and are pushing for for clearer labelling. The current poultry housing measures in England and Wales are expected to last through winter, affecting most birds sold for Christmas.

Supplements

The FDA has expanded its safety alert on dietary supplements falsely sold as tejocote root or Brazil seed after finding they contain yellow oleander, a highly toxic plant. Yellow oleander can cause serious neurological, digestive and potentially life-threatening heart effects. More than 20 supplement brands are now implicated.

Fruit

Asda is facing a lawsuit from Nador Cott Protection SAS over its Tang Gold mandarin, which Nador Cott claims is an unauthorised derivative of their protected Nadorcott variety. Asda argues Tang Gold comes from W. Murcott, distinct from Nadorcott, but the court ruled Asda cannot claim this distinction. The case, set for trial on 24 November, will address plant breeders' rights and could impact intellectual property protection in the UK citrus industry.

Wines and spirits

A lawsuit has been filed by consumer-rights firm Hagens Berman accusing Costco of knowingly selling adulterated Kirkland Signature tequila containing significant non-agave sugars, despite labelling it as "100% Blue Agave". The suit targets several Kirkland tequila products and alleges consumer deception, unfair trade practices and violations of organised crime laws (RICO). It highlights that the regulatory body overseeing tequila standards, the Consejo Regulador Del Tequila (CRT), is a private group dominated by industry players, raising conflict of interest concerns.

Earthshot Prize

The High Seas Treaty has won the 2025 Earthshot Prize. Ratified in September 2025 and set to take effect in January 2026, the treaty aims to protect 30% of the world's oceans and safeguard marine biodiversity in areas beyond national borders. The High Seas Alliance is urging more countries to ratify the treaty so it becomes fully implemented and enforceable.

Higher Education

The University of Nottingham announced plans to close its agricultural, food science courses as part of a major restructuring. The proposal would shut the historic Sutton Bonington campus to new undergraduates from 2026/27, ending more than a century of agricultural and food teaching.

Freight crime

Criminal gangs are buying haulage firms using stolen identities to pose as legitimate truckers and steal large shipments. One Midlands transport company unknowingly subcontracted to a fake firm, which disappeared with £75,000 worth of goods. The gangs use sophisticated tactics, including fake number plates and false company registrations. Police and industry experts warn that freight crime is increasingly organised and sophisticated, causing significant losses and rising costs for businesses and consumers.

Gene editing and precision breeding

England has become the first European country to legalise the development of gene-edited and precision-bred plants through the Genetic Technology (Precision Breeding) Act 2023, effective from 13 November. The law aims to provide growers with crop varieties offering higher yields, improved disease resistance and greater climate resilience.

Food inflation

The UK's overall inflation rate fell to 3.6% in the year to October, marking the first drop in seven months. This decline was mainly driven by energy prices rising at a slower pace. Despite the easing of general inflation, food price inflation edged up to 4.9% in October, making food the largest driver of consumer price increases last month. On average, food prices are nearly 5% higher than in October 2024, continuing to place pressure on household budgets.

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Food Safety November

Country	No of Alerts
France	124
Canada	50
United States	38
Belgium	35
Turkey	31
China	31
Germany	29
Poland	29
Netherlands	24
United Kingdom	17
India	15
Spain	10
Australia	10
Italy	10
Denmark	9
Argentina	8
Ireland	7
Romania	7
Iceland	6
Czechia	6
Egypt	6
Vietnam	6
Brazil	5
Norway	5
Luxembourg	5
Finland	5
Ukraine	4
Jersey	4
Nigeria	4
Ecuador	4
Croatia	4
Switzerland	4
Pakistan	4
Israel	3
Sweden	3
Peru	3
Austria	3
Mexico	3
Lithuania	2
Morocco	2
Hong Kong	2
Greece	2
Sri Lanka	2
Iran	2
Bulgaria	2
Colombia	2
Kazakhstan	2
Sudan	2
Afghanistan	2
Azerbaijan	2
Guatemala	1
Belarus	1
Ethiopia	1
Serbia	1
New Zealand	1
Ghana	1
Moldova	1
Uruguay	1
Albania	1
Slovenia	1
Hungary	1
Nicaragua	1
Singapore	1
Russia	1
Lebanon	1
Bangladesh	1
Estonia	1
Latvia	1
Malaysia	1
Thailand	1
Myanmar	1
Syria	1
South Korea	1
Uganda	1
Indonesia	1
Taiwan	1
United Arab Emirates	1
Uzbekistan	1
Venezuela	1
Total	**624**

SUMMARY

There were 607 Red, 16 Amber and 1 Green totalling **624 safety alerts and product recalls*** in November.

The majority of alerts were for bacterial pathogens and added contaminants (29.5% and 11.7% respectively). Pesticides were third with 11.2%.

184 Bacterial pathogen alerts (43% Salmonella, 32% Listeria): E.coli accounted for 11% of which 62% were STEC.

88 Added contaminant alerts (69% novel foods, 11% artificial colours)

Top 3 alerts by commodity

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

Top 3 number of alerts by county of origin

1. France: Pork; cheese; fish.
2. Canada: Nuts & seeds; sauces & condiments; vegetables.
3. USA: Supplements; nuts & seeds; cheese.

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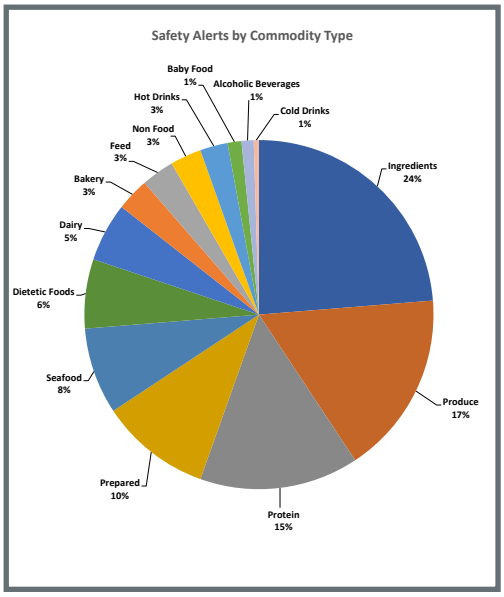
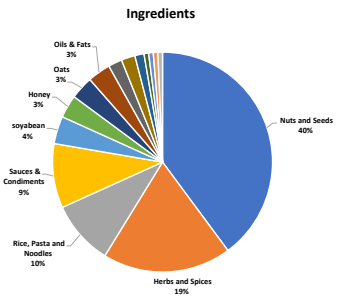
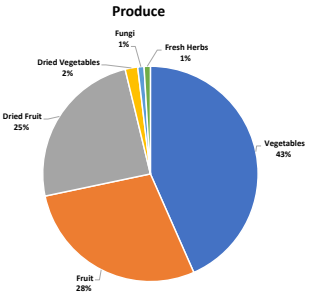
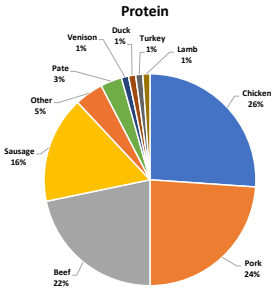
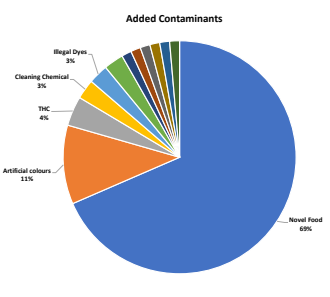
*Safety alerts & product recalls compiled from RASFF, FDA, AFSCA,CFIA, Rappel Consommateur, potraviny na pranyr, SFA, CFS, MPI, FSAI & Food Standards AU



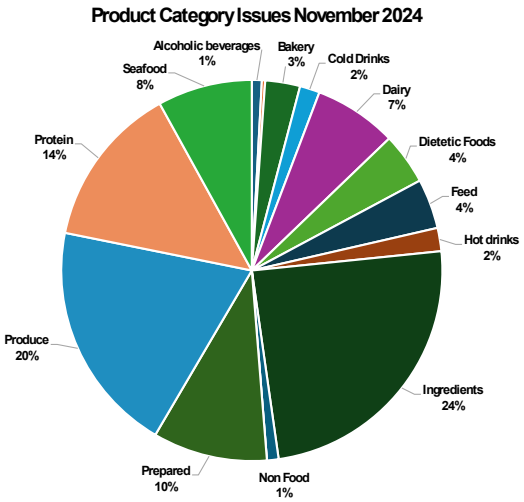


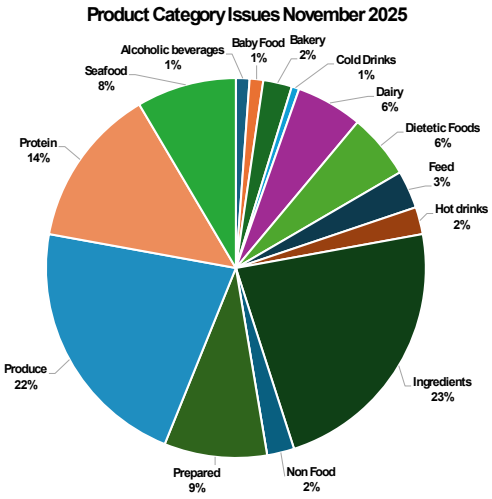




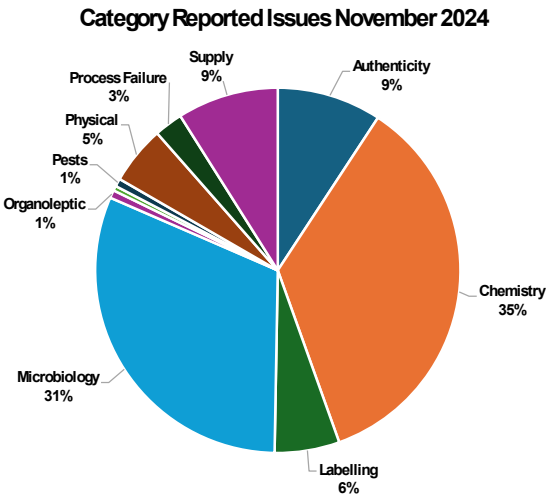


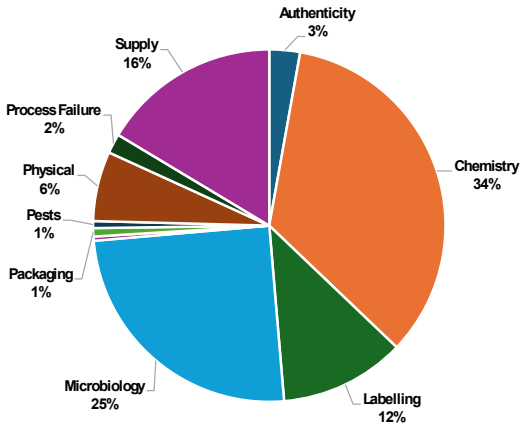
Knowledge Base Trends



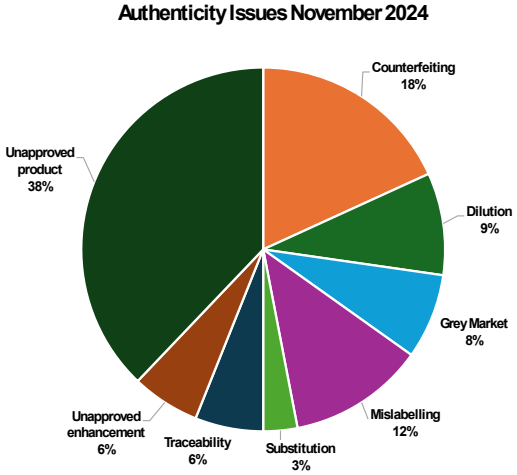


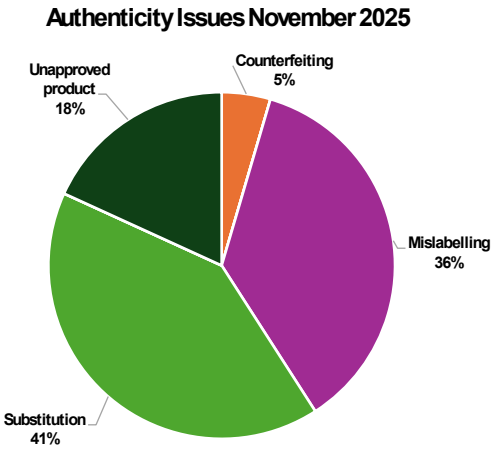
November 2025 has resulted in a similar product category profile to 2024. A slight increase in the proportion of issues reported in produce, dietetic foods and non-food.





November 2025 has seen an increase in issues related to labelling and supply, but a decrease in reported microbiology and authenticity issues.





The distribution of authenticy issues shows considerable differences between November 2024 and November 2025. Most notably, reports of substitution increased from 3% in November 2024 to 41% in November 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

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