



Food Forensics Risk Newsletter

February 2026



HIGHLIGHTS

- Recent severe weather across Spain, Turkey and Morocco has disrupted soft fruit and vegetable supplies.
- UK protected horticulture growers warn that sharp rises in electricity standing charges from 1 April will force higher prices or production cuts.
- Global processed tomato production in 2025 is estimated to have dropped 12%.
- Major crop failure in Guatemala has boosted Kerala's cardamom sector.
- Concerns over the quality and size of the upcoming Indian turmeric crop causes rise in prices and substitution risk.
- New French national order suspending import of certain plant products containing residues of five pesticides that are currently prohibited in the EU.

Produce

Citrus

Gale-force winds have severely disrupted the peak citrus harvesting period in one of Greece's main citrus-growing regions. Orchards across areas from Galatas to Messolonghi have suffered heavy damage, with more than half of the fruit reportedly knocked to the ground and widespread breakage of branches and whole trees. Further losses are expected as injured fruit remaining on trees may develop rot following the heavy rain.

The 2025/26 citrus season in southern Europe is facing difficulties due to extreme weather, higher pest pressure and changing market conditions, leading to lower yields in Spain, Italy and Greece. EU production of oranges, mandarins, and lemons is expected to decline, while grapefruit production may rise.

Florida's 2025-26 orange crop is forecasted at 12 million boxes, the lowest since 1930, down 2% from last year. The decline is due to shrinking groves caused by citrus greening disease and damage from Hurricane Milton. Although new treatments and a \$140 million industry budget aim to support recovery, new trees will take 3-5 years to produce fruit. Meanwhile, orange juice prices have fallen sharply as Brazil expects a rebound in its crop. Florida mainly supplies juice oranges, while California's fresh orange output is expected to rise slightly, keeping overall US production stable.

Top Fruit

As of January 12, 2025, European apple and pear stocks were higher compared to the previous year, despite stronger sales activity. Apple stocks increased by 11.6% year-on-year to 4.76 million tons. Key stock holders include Italy (1.53 million tons), Poland (1.21 million tons, +12.9%), France, Germany (+50.4%), Belgium (+34.2%), Austria (+84.7%), and the Czech Republic (+189.6%). Some countries like Spain, Switzerland and Denmark saw stable or slightly reduced stocks. Pear stocks rose 14.2% to 766,482 tons. Belgium (261,060 tons, +39.4%) and the Netherlands (249,886 tons, +14.1%) lead in stock volumes. Italy's pear stocks declined by 26.3%, while Poland, Spain (+40%), France and the UK (+52.8%) saw increases. Germany, Switzerland, and Denmark experienced decreases.

British apple and pear growers are expected to face a roughly 2% rise in production costs in 2026, driven by inflation in orchard management and post-harvest operations, according to British Apples & Pears. Growing and harvest costs are forecast to increase by nearly 3%, overheads by 3%, and storage, packing and marketing by around 2%. The trade body warns these increases will further squeeze already thin margins and cannot be absorbed by growers. BAPL is urging retailers to reflect higher costs in prices, commit to long-term supply partnerships, and prioritise British fruit to support investment and prevent further decline in the sector.

Soft Fruit

Strawberry yields in northern Morocco are suffering due to rain, cold and less sunshine resulting in about a one-third drop in production compared to last season. Quality issues, particularly mould, have led to extensive sorting before packing. Prices are slightly higher than last season. However, Morocco's strawberry industry faces a structural decline due to Egypt's market dominance. The cultivated area has shrunk from 3,700 hectares in 2022 to 2,300 hectares in 2025, partly because Moroccan strawberries are 10-15% more expensive than Egyptian ones.

Morocco's northern blueberry season has begun with a delayed start but positive prospects. While cold, dark weather reduced yields in Agadir, northern regions expect higher volumes thanks to expanded acreage and more mature plants. Harvests are about three weeks late, quality is mostly on target despite some brix and colour issues, and peak production is expected in April. Early volumes have been sold locally due to strong domestic prices, with exports to Europe set to increase as supply and demand rise.

This season, Egypt's strawberry acreage and production rose significantly, causing oversupply and a nearly 30% drop in early export prices. Prices later stabilised but remain pressured due to rising production costs driven by higher demand for land, labour, and inputs. Early harvesting in November led to quality issues and challenges with pesticide residue

compliance (MRL targets), with new growers needing time to adjust.

Raspberry supply in Spain and Portugal is lower than expected due to cold, wet weather causing limited availability and variable quality. Planting in Spain is reduced, and no significant increase is expected in Portugal, with some production shifting to Morocco, which also faces cold, rainy conditions and storms.

Stone Fruits

Chile remains the world's leading supplier of cherries to China, with the market absorbing around 90% of Chilean cherry exports and close to 40% of its total fruit shipments. The trade has grown rapidly under the Chile–China free trade agreement, with cherries becoming a key seasonal product during China's winter and Lunar New Year period. This season, however, cherry export volumes are down 12.1% year on year, reflecting an earlier harvest and shorter supply window.

Bananas

UK wholesale banana prices rose sharply in week 3 across several origins. Colombian saw the biggest increase, up 27% to £1.00/kg. Honduran prices increased 7% to £0.88/kg, and Guatemalan prices edged up 1% to £0.98/kg. Costa Rican prices remained stable at £0.91/kg. Overall, bananas from ACP countries averaged £0.95/kg, an 11% rise from the previous week, matching the overall average price increase for all origins.

Chiquita has harvested its first banana crop in Panama since resuming operations after last year's labour dispute, with the initial production supplying the domestic market and export shipments planned from February.

Pineapple

Adverse weather in Costa Rica has severely impacted pineapple production, causing significant crop losses in 2025 and continuing supply shortages into early 2026. Heavy rainfall, high temperatures and disease disrupted growth, flowering and pollination, lowering yields. Similar challenges affect other major producers like Ecuador and Panama, with production down 15-30% from normal levels. These disruptions have strained global pineapple markets where Costa Rica supplies about 90% of imports, leading to higher prices and reduced consumption. Pineapple juice stocks in Costa Rica are likely to remain low until the new crop starts in March. Elevated pineapple prices may reduce demand for pineapple juice, with bottlers

expected to favour alternatives such as orange and mango concentrates.

Mango

Peruvian mango production is facing instability as low market prices and high export volumes fuel unrest among growers. A recent strike in northern Peru was triggered by demands for higher farmgate prices that exporters say are unsustainable given falling prices in key markets like the US where heavy shipments are pushing prices down further. Ongoing rainfall is also raising disease risks and costs, adding pressure to an already fragile season.

Salad crops

Ongoing poor growing conditions, driven by prolonged adverse weather in Spain, Turkey and Morocco, continue to impact protected salad crops. Low temperatures and reduced light levels are affecting tomatoes, peppers and cucumbers, leading to lower quality, reduced shelf life and constrained availability. With key origins experiencing difficulties simultaneously, this is resulting in widespread shortages, price rises and ongoing supply challenges.

Most recently, Storm Kristin caused flooding of greenhouses in Almería, damage to soft fruit production in Huelva, and the waterlogging of fields in Murcia which is reducing lettuce quality and usable sizes. In Morocco, storms closed Tangier port, causing major transport delays and blocking exports.

UK protected horticulture growers warn that sharp rises in electricity standing charges from 1 April (up 60–80%, with further increases expected) will force higher prices or production cuts unless the government intervenes urgently. Glasshouse businesses could face up to £1m a year in extra costs, making price rises for tomatoes, cucumbers and peppers unavoidable.

Potatoes

Asia, led by China and India, is rapidly gaining French fries market share with prices up to 30% lower than traditional suppliers. This puts strong pressure on European producers, who face high energy and labour costs alongside record harvests, causing low potato prices and large stocks. The global frozen fries market is growing steadily (3-5% annually).

World potato production in 2025 is projected to reach a record 400 million tons, driven by strong output in major producing regions. In 2024, global

production rose 1% to 390.4 million tons, with a slight increase in harvested area and improved yields. Asia remains the top producer, accounting for over half of global output and area, while Europe and North America saw reductions in planted area. South America, Oceania, the Caribbean and Central America showed the strongest production growth. North America and Oceania led in yields, exceeding 40 tons per hectare. China remained the largest producer, followed by India and Ukraine, with notable production gains in Germany and France. Overall, yields have increased over the past decade despite a decline in global potato-growing area.

Tomatoes

Tomato prices in China surged sharply in late 2025 due to adverse weather and supply constraints during the main marketing period. Earlier in the year, favourable weather had depressed prices, causing reduced autumn plantings, but subsequent heavy rains and cold spells damaged crops and delayed harvests. Current supply mainly comes from northern greenhouses and southern provinces, with costs rising due to winter reliance on protected cultivation and long-distance transport. Prices have eased slightly since mid-January but are expected to remain firm until after the Spring Festival in mid-February, when demand typically declines.

Global processed tomato production in 2025 is estimated to have dropped 12%, mainly due to declines in China and the EU, while the US saw increased output. Despite lower production, high inventories from record harvests in previous years keep prices competitive. China's production fell sharply by 53% but leveraged strong inventories for export pricing. Spain faced heatwave-related losses, with a 22% production decline and rising tomato prices. Italy increased output by 7%, becoming the world's second-largest producer, but its exports weakened due to US tariffs and global competition. California led production growth with 10.65 million tonnes, boosting its export potential. Overall, high supply levels and fierce price competition, especially challenging for EU producers with high costs and regulations, are expected to continue shaping the market.

Carrots

UK carrot growers have faced extreme weather swings, with last summer's drought followed by heavy rainfall that waterlogged fields and delayed harvesting. Recent snow and freezing

temperatures have caused further disruption. Despite these challenges, overall yields are expected to be close to average, though variable by region. Supplies are likely to be tight but sufficient through to the new season, with UK carrots expected to last until spring before the new English crop comes in early summer.

Ginger & Garlic

Egypt's garlic acreage has grown by 20-25% this year, but yield gains are uncertain due to unfavourable weather, particularly cold conditions in November and December affecting cultivation. Demand remains steady and sizes are still small for both white and purple garlic.

In 2025, Peru's ginger exports saw a 10% drop in value despite a 13% rise in volume, mainly due to falling international prices. Prices peaked early in the year but declined sharply mid-year before a slight recovery. The US remained the top market, though its imports fell, while the Netherlands and Canada also saw declines. Spain increased purchases. Fresh ginger, which makes up the bulk of exports, declined significantly in value, though ginger juice exports grew by 23%, and dried ginger remained steady. Overall, lower prices for fresh ginger drove the export value down despite higher shipment volumes.

Avocado

The Hass avocado harvest in Spain's Valencian Community is ending earlier than usual this year due to lower yields caused by summer heat waves and hailstorms in key growing areas with yields estimated 25-30% below normal. Market supply is low, pushing prices high at around €3.10/kg for smaller sizes and €2.00/kg for larger ones with demand outstripping supply. Harvesting has also been delayed by bad weather in Morocco. The next variety, Lamb Hass, is gaining popularity in Europe and will be harvested once it reaches optimal maturity.

Herbs & spices

A review by the Botanical Adulterants Prevention Program (BAPP) claims ginseng adulteration remains widespread in the herbal products industry. The authors found nearly 25% of tested ginseng products were adulterated, often by substituting authentic Asian or American ginseng species with cheaper alternatives like Siberian, Indian or Brazilian ginseng. Some products were also contaminated with drugs like sildenafil, tadalafil and ephedrine, especially in energy

supplements. The review found no clear improvement trend over time, suggesting adulteration is a persistent issue.

A major crop failure in Guatemala has boosted Kerala's cardamom sector, leading to cardamom exports nearly doubling from India in 2025.

Vietnamese pepper prices remain high amid tight supply expectations ahead of the 2026 harvest. Prices continue to be supported by strong export demand and limited global availability, keeping market levels elevated despite short-term fluctuations. The sustained high prices raise concerns about the risk of adulteration and fraud. Historically, elevated pepper prices have increased incentives for mixing or mislabelling lower-grade or foreign-origin pepper in domestic and export channels.

Trading prices for turmeric have risen driven by growing concerns over the quality and size of the upcoming Indian crop due to the impact of poor weather. The higher prices and potentially limited supply raise the risk of adulteration and substitution.

Nuts

From January to November 2025, Georgia's hazelnut exports rose 62% year-on-year with volumes reaching 16,900 tonnes and average prices increasing from USD 6 to USD 8.66 per kg. Italy was the largest importer, followed by Spain and Germany. Growth of hazelnut exports from Azerbaijan is also seeing high growth.

China now supplies over 20% of the global macadamia market, up from 3% in 2016. Supported by government subsidies and training, production has seen growth of around 25% annually, mostly in Yunnan. China is the second-largest producer of macadamia nuts behind South Africa.

Supplies of pistachios are tightening despite record US production in the 2025/26 on-year crop. Lower outputs from Iran and Turkey are further pressuring supplies. In the US, next year marks an off-year in the biennial production cycle.

Dried Fruit

Tunisia's 2025/2026 date harvest reached a record 404,000 tons, including 347,000 tons of the Deglet Nour variety. This recovery follows a difficult previous season and is attributed to better weather and expanded cultivation areas. However, exports have been hit by Morocco's sudden enforcement of import quotas. The

move stranded around 15,000 tonnes of Tunisian dates at Casablanca port and has effectively halted shipments. Morocco is believed to have acted to protect its own rising production of dates.

Cereals

Russia exported more than two million tons of grain harvested from occupied Ukrainian territories in 2025, falsely labelling it as Russian produce, according to Ukraine's Foreign Intelligence Service. Most shipments moved through the port of Sevastopol, with major destinations including Egypt and Bangladesh, alongside Turkey, Syria and Lebanon. To evade sanctions and conceal the grain's origin, exporters used ship-to-ship transfers in open waters.

Grain prices remain stable despite political volatility, supported by strong supply and demand. However, recent winter storms have raised concerns over frost damage in key US and Russian growing regions. UK feed wheat futures for May 2026 fell slightly following good harvests and higher-than-expected US grain stock reports. AHDB cautions that although wheat prices appear low compared to 20 years ago, rising production costs mean profitability may be tighter. In contrast, rapeseed prices are more positive, boosted by higher crude oil prices, improving Canadian-Chinese relations, and favourable currency movements.

Coffee

Arabica coffee futures fell to around \$3.51 per pound, their lowest level since late December 2025, on optimism over Brazil's 2026/27 crop. Estimates remain at 70 - 80 million bags, supported by generally favourable weather, milder temperatures and a positive biennial cycle, despite concerns over irregular rainfall in some regions. Brazil posted record coffee export revenues of \$15.6bn in 2025, even as export volumes fell 21%.

Cocoa

Cocoa prices have continued to fall in January, dropping close to \$5,000 per tonne, their lowest level since late November, as improved weather in West Africa lifts supply expectations. After a record 48% price drop in 2025, better rainfall in key producers Ivory Coast and Ghana is expected to support stronger harvests in February and March. However, demand remains weak, with European processing data pointing to subdued consumption despite the improved crop outlook.

Acacia gum

The civil war in Sudan is heavily disrupting the global supply of acacia gum, a key food and drink ingredient for emulsifying soft drinks, coating chewing gum and improving texture and shelf life. Since Sudan typically produces the vast majority of the world's supply, the conflict has caused transport problems, traceability challenges and tight supplies. Some suppliers are diversifying sourcing in neighbouring countries like Chad and Senegal. No alternative ingredient currently matches acacia gum's performance, raising concerns if the conflict continues.

Honey and Syrups

Turkey, the world's third-largest honey producer, is facing a rise in counterfeit honey products amid high inflation and a declining number of beekeepers. To address this, the government plans to strengthen testing and quality controls to help ensure honey authenticity.

Palm oil

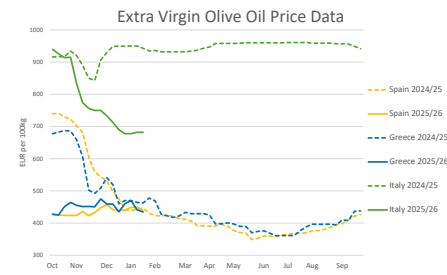
The National Palm Produce Association of Nigeria (NPPAN) has warned of widespread adulteration of palm oil in Nigerian markets, calling for urgent government action to protect public health and the industry. While they cannot confirm claims that 60% of palm oil is adulterated, they acknowledge the problem is mainly caused by middlemen (not licensed mills) adding harmful substances such as Sudan dyes. They stress the need for strong government enforcement to prevent economic sabotage and protect consumers.

Olives & Olive oils

A European Court of Auditors (ECA) report revealed major weaknesses in the EU's olive oil control systems. Nearly one-third of conformity checks found non-compliance, with member states failing to meet minimum inspection requirements. Traceability was found to be poor and cross-border cooperation among EU countries was found to be ineffective. Oversight of imported olive oil, which accounts for 9% of EU consumption, mainly from Tunisia, Turkey, Argentina and Morocco, was ruled to be minimal or absent. The report warns these gaps threaten consumer trust amid growing demand for transparency and authenticity.

Although the price of Italian EVOO has fallen to around 260 € per kg less than the same period last season, it continues to hold a significant price premium over

both Greek and Spanish EVOO making substitution a continued risk.



Protein

African Swine Fever (ASF)

Provisional investigations into Spain's African swine fever (ASF) outbreak near Barcelona have largely ruled out a nearby government lab as the source. Since late November, 47 wild boars have tested positive for ASF, with most cases within 20km of the initial outbreak. Although early reports suggested the virus strain resembled one from Georgia and might originate from a containment facility, analysis found no match. The virus appears to be a new, less virulent variant with multiple mutations.

Avian Influenza (HPAI H5N1)

UK avian influenza cases continue to rise in the 2025–26 season, with 90 confirmed outbreaks of highly pathogenic H5N1 so far, plus one low pathogenic case, according to Defra. New cases in Suffolk, North Yorkshire and the Scottish Borders have triggered protection and surveillance zones and the culling of affected flocks. England accounts for the majority of cases, while Scotland, Wales and Northern Ireland have also been affected.

Blue-tongue virus (BTV-3)

A case of bluetongue virus (BTV) has been confirmed in a cow in County Wexford, marking the Republic of Ireland's first confirmed case following earlier detections in Northern Ireland, where a fifth suspected case is now under investigation in County Down. Authorities say the development is unwelcome but expected, given the virus's spread across Europe, Great Britain and Northern Ireland. There have been 277 cases of bluetongue in Great Britain in the 2025 bluetongue season (since July 2025).

Lumpy Skin Disease

The northern Australian cattle industry remains "alert, but not alarmed" as lumpy skin disease (LSD), with cases confirmed in nearby Bali. Australia remains free of

LSD but sees these cases as a serious threat and has been preparing for trade negotiations should an outbreak occur.

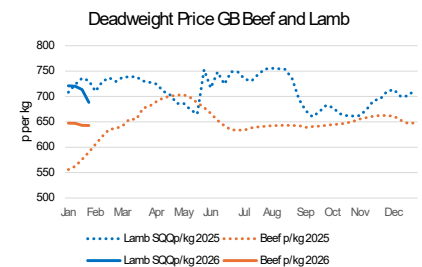
Sheep & Goat Pox

Greece's livestock sector continues to face a widespread outbreak of sheep and goat pox. Since August 2024, over 2,500 farms have been affected, with more than 470,000 animals culled to contain the spread. The outbreak continues to expand, with 57 new cases confirmed across 16 regions between late December 2025 and early January 2026. Strict movement restrictions and culling remain central to controlling the disease, but the crisis poses ongoing economic challenges for Greece's sheep and goat industries. Mass vaccination has currently been rejected.

Lamb & Goat

In late January sheep prices fell sharply. Deadweight old season lamb prices dropped 25p/kg to 688p/kg and were well below year-ago levels, as supply outpaced subdued domestic and export demand. Liveweight prices also weakened, with lower auction throughputs and wet weather disrupting marketing, although cull ewe prices remained higher year on year due to tighter numbers.

Lamb retail sales performed well in the 12 weeks to December 28, with volumes up 3.8% and spending up 5.4% year-on-year.



Average prices paid increased by 1.6%. Total primary lamb cuts rose 8.3%, led by a 12.2% increase in lamb roasting sales, boosted by Christmas demand.

Dairy

Rabobank estimated that total milk production from the Big 7 dairy exporters (EU, US, New Zealand, Australia, Brazil, Argentina, Uruguay) finished 2025 up 2.2% compared to 2024, with global output peaking in Q3 and Q4 volumes close behind. Increased production led to higher milk solids, supported by favourable feed costs that kept margins positive despite falling prices.

As of October 2025, the GB milking herd

totalled 1.63 million head, the lowest October figure recorded and down 0.9% from the previous year. Despite this, milk deliveries hit record highs due to improved productivity and higher yields. With falling milk prices and commodity pressures, farmers are expected to cull older or less productive cows. In Q3 2025, UK cheese supplies grew 3% due to a 5% production increase and higher imports, mainly from the EU, supported by strong export demand despite higher prices. Butter production rose 8%, but a 24% drop in imports and increased exports led to a slight 3% decline in available butter supplies.

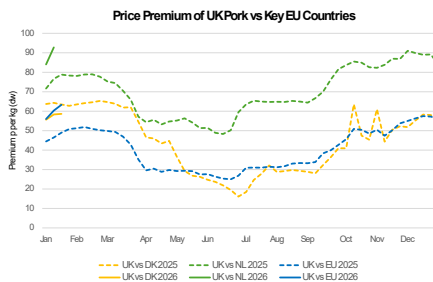
Beef

Deadweight GB beef price remained relatively stable in January at around 645 p/kg. Prices are pressured by increased beef imports from Australia and New Zealand. Beef retail spend grew by 9% over Christmas, though overall beef volumes fell 4% in 2025 due to uneven performance across cuts.

EU beef production is forecast to fall by 9.2% by 2035 as the cow herd shrinks, with per capita consumption declining to 6.1kg. Sheep and goat meat production is also expected to decrease, falling by 0.7% per year over the next decade.

Pig Meat

EU pigmeat production is forecast to decline by 0.75% per year between 2025 and 2035 due to stricter welfare and environmental rules and weaker export demand, particularly from China. Consumption is also expected to fall from 23.3kg to 21.8kg per capita, reflecting environmental, societal, and health concerns. Exports are projected to drop by 1% per year, with increased competition from the US, Canada and Brazil, although the UK is expected to become the EU's largest export market.



Chicken & Turkey

UK poultrymeat production reached a record 2.07 million tonnes in 2025, up 1.6% year-on-year, despite lower stocking densities, volatile chick placings and weaker turkey numbers. Growth was

driven almost entirely by broilers, with output rising 1.7% to a record 1.86 million tonnes. In contrast, combined turkey and duck production fell about 1% on the year and has declined more than 20% over the past decade. Broiler chick placings ended 2025 slightly lower overall, while turkey poult numbers also declined.

EU broiler prices eased by 2.3% in November and December, averaging 282 euro cents/kg in mid-December, still 3.4% higher than the same period in 2024 and historically high. US broiler prices, previously much lower, rose to about 217 euro cents/kg, narrowing the gap with the EU. Brazil's prices remained below 130 euro cents/kg. EU broiler production increased slightly but stayed low compared to previous years.

Egg Layer

British free-range egg producers have criticised the UK Government's decision to extend its trade agreement with Ukraine for two more years without imposing quotas on egg imports. The British Free Range Egg Producers Association warn the move could undermine UK producers, who face higher costs and stricter welfare and safety standards, while exposing them to cheaper imports. There are concerns over transparency for consumers, particularly where imported eggs are used in processed foods.

EU egg prices hit a record 296.4 euro cents/kg at the end of 2025, up 21% year-on-year and 2.5% monthly. US egg prices were more volatile, ending the year near 241 euro cents/kg. High laying hen placements in the EU suggest strong future supply, with France, Germany and Spain each contributing around 15% of production.

Cod & Haddock

EU sanctions on Russian seafood continue to reshape trade flows and have effectively created a two-tier market for Russian cod and haddock. Russian producers are increasingly focused on non-EU destinations, particularly China and other Asian markets, where demand for frozen whitefish remains strong and sanctions do not apply. Within Europe, however, Russian product is largely excluded, tightening supply and increasing reliance on Norwegian fish.

Salmon

Salmon producers in the UK, Norway and the Faroe Islands faced new challenges after President Trump threatened (but later backed down on) increased tariffs

on these countries due to their recent military presence in Greenland. The US, a major salmon buyer, could sharply reduce imports, threatening European exporters. Norway's salmon sales to the US have already slowed under existing tariffs, while Canadian and Chilean producers benefit from lower or no tariffs. The situation has caused market uncertainty, with salmon prices expected to drop. UK and EU officials are in talks to address the threat, but a trade war remains possible.

Sardines

Morocco has announced an indefinite ban on exports of frozen sardines starting February 1, 2026, to address declining sardine stocks and rising domestic prices. Sardines make up over half of Morocco's wild catch and are vital for its canning industry. The ban aims to keep more supply for the local market, stabilising prices and supporting domestic demand. This decision impacts global sardine supply, forcing international buyers to seek alternatives.

Anchovy

Peru's anchovy catch has rapidly approached 98% of the government-set quota, driven by a significant surge in landings following the Christmas holiday period. The fishing fleet, which paused operations from December 24 to 26, resumed activity with increased intensity in the north-central regions, resulting in a sharp acceleration of catches. This robust harvesting pace comes amid steady fishmeal prices in China, a key market for Peru's anchovy-derived products.

Fishmeal

Peru's fishmeal prices in China have eased as seasonal shipments from Peru's anchovy fleet increase, nearing quota completion. China's fishmeal stocks recently hit a 52-week low, but the arrival of more Peruvian fishmeal is balancing supply and demand, causing prices to soften. Peru is a top fishmeal producer, and once its anchovy quota is reached, shipments will slow, possibly tightening supply later.

Animal Food

Pet-food RASFF Alerts & Recalls

Radames recalled 'Dog kibble' (BB 13.04.2027) due to detection of aflatoxin.

Wilky Dog recall 'Wilky dog with pork' (BB 24.11.2026) due to undisclosed microbiological risk.

Lily's Kitchen has announced a voluntary

recall of a limited quantity of its Pasta Al Ragu Wet Adult Dog Food (400g cans) after a quality investigation identified a potential risk of plastic pieces in the product.

General

Environmental

Indonesia claims it has reclaimed more than 4 million hectares of land used illegally for plantations, mining and other activities inside designated forest areas as part of a major crackdown launched in 2025. Most of the seized land involves oil palm plantations, along with some mining sites, raising questions about how much of Indonesia's palm oil sector is operating illegally and how the figures are calculated. While some areas have been returned to conservation and forest restoration, large portions have been transferred to a state-owned palm oil company, rapidly expanding its footprint.

Climate

The World Economic Forum's Global Risks Report 2026 highlights extreme weather as the biggest long-term global threat, despite it slipping to fourth place in short-term risk rankings. Environmental risks such as ecosystem collapse, biodiversity loss and critical changes to Earth systems dominate the outlook through 2036. Although geopolitical and economic issues currently overshadow environmental concerns in the short term, the report warns that climate-driven disasters will increasingly impact especially poor and developing countries.

Illegal, unreported, and unregulated (IUU fishing)

Japan has pledged to provide drones to Ecuador, Peru, Argentina and Uruguay to help monitor IUU fishing in their exclusive economic zones. The move is aimed at strengthening surveillance capacity in a region struggling with limited resources, particularly against large distant-water fleets, including but not limited to China's. Experts warn that equipment alone is not enough without political will and stronger regional cooperation.

Animal welfare

Defra has launched two public consultations aimed at phasing out enriched cages for laying hens by 2032 and improving lamb welfare by ending castration and tail docking without pain relief. These moves align with Defra's Animal Welfare Strategy to give farm animals more freedom and dignity. While

most UK eggs sold in supermarkets are free-range, about 20% of production still comes from cage systems, mainly supplying food service and processing. Some industry groups, including the British Egg Industry Council and NFU, express concerns about market impacts and unfair competition from imports not subject to the same standards. The consultations are open until March 9.

Labour shortage

Morocco's farming sector is reporting a severe labour shortage which poses a bigger threat than water scarcity. Labour-intensive crops such as vegetables, citrus, fruit and olives are most affected, with some harvests at risk of going uncollected. The shortage is driven by rural depopulation after years of drought, competition from better-paid urban construction projects, and the lack of stable agricultural employment.

Tariffs

The US has threatened to impose 100% tariffs on Canadian goods if Canada finalises a trade deal with China. This could severely disrupt agriculture and food trade between the two countries, as Canada exports significant amounts of grains, meat, dairy and processed foods to the US. The threat could lead to higher prices and disrupted supply chains in North American agri-food trade.

USA

The Trump administration is pressuring the UK to adopt US standards and recognise American accreditation bodies in ongoing trade talks. Closer alignment with the US on food safety, carbon emissions and manufacturing standards could strain relations with the EU. Despite US pressure, UK negotiators have so far resisted changes to food, animal welfare and environmental standards. The UK insists it will uphold its standards and continue to pursue strong trading relationships with both the EU and US.

French MRL residue decree

France will suspend the import and sale of certain non-EU fruit and vegetable products from 8 February if they contain residues of five pesticide active substances even where EU approved MRLs are in place. The new [Ministerial Order](#) applies to both fresh and processed products and sets the tolerance at the laboratory detection limit, meaning any detectable residue will be non-compliant. The banned substances include four fungicides (carbendazim, thiophanate-methyl, mancozeb and

benomyl) and a herbicide (glufosinate). A wide range of produce is covered, including apples, pears, stone fruit, grapes, berries, tomatoes, peppers, potatoes, mushrooms, lettuce and other vegetables. French authorities are urging exporters and traders to strictly verify compliance, including through residue testing, before shipment. The measure targets imports from outside the EU and is framed as a temporary emergency action to enforce EU pesticide standards. The decree is claimed to affect 56% of imported produce, representing about 20% of France's fresh fruit and vegetable consumption.

EU-Mercosur Trade Deal

The EU has approved progression of the EU-Mercosur trade deal to create a free-trade area and cutting trade tariffs. However, farmers across France and Spain have reacted strongly against the deal with protests and blockades in Paris and on highways. The farmers argue the deal would pressure EU producers who face stricter food safety, animal welfare and environmental standards. The French government has warned it will not tolerate such actions, while farmers' unions have threatened further protests if the deal proceeds.

Pesticides

India's pesticide industry is urging tighter regulation of pesticide sales on e-commerce without proper approval documents, warning that current safeguards are insufficient for high risk products.

Water security

In 2025, rainfall was below average in parts of the Netherlands. Increased rainfall in southern Spain helped fill reservoirs, easing water shortages for growers. Morocco has emerged from a 7-year drought thanks to recent heavy rainfall and snow, boosting water reserves and dam levels significantly. Between September 2025 and January 2026, rainfall was nearly double that of the previous year.

Egyptian fresh produce

The rise in RASFF notifications related to Egyptian fresh produce in the European market, primarily due to pesticide residues exceeding EU maximum residue limits (MRLs), has led to increased scrutiny and inspections. Between October and December 2025, 27 notifications were specific to Egypt. This trend reflects a broader global tightening of food safety enforcement affecting multiple exporting countries.

IN THE NEWS: January

Baby Food

A major recall of baby formula has expanded after the discovery cereulide toxin in certain batches of Nestlé SMA infant formula. The recall now includes products from Danone and Lactalis due to a shared contaminated ingredient supplier. The toxin was traced to a single Chinese supplier of ARA (arachidonic acid) oil leading to one of Nestlé's largest preventative recalls with sales suspended in over 60 countries.

Seafood

Four people have been charged with conspiracy to commit fraud over the alleged mislabelling of smoked salmon. The products supplied by Bleiker's Smoke House Ltd were marketed as Scottish salmon when they allegedly contained Norwegian salmon, with offences said to have occurred between August 2021 and March 2022.

A Japanese restaurant owner paid a record £2.4 million for a 243kg bluefin tuna, bought by Kiyomura Corporation, which owns the Sushi Zanmai chain. The high price reflects the fish's prized status in Japanese cuisine and strong demand despite concerns over bluefin tuna sustainability due to overfishing.

Meat

In the UK, a man has been sentenced to 2.5 years in prison having pleaded guilty to handling stolen poultry goods worth over £500k. The scheme involved the impersonation of legitimate businesses, including McDonald's franchise details, to steal chicken and turkey shipments from suppliers. 16.8 tonnes of stolen poultry were recovered but had to be downgraded to pet food due to lost traceability.

More than 50 tons of pork were fraudulently processed and sold as premium 'exotic' meats to restaurants in southern Vietnam. The operation, active since late 2024, disguised pork as high-value meats like ostrich, goat, porcupine and venison.

Seven people have been arrested in Ho

Chi Minh City (Vietnam) for producing and selling fake beef made from pork treated with cow's blood and industrial chemicals. The fraud scheme supplied around 75 restaurants with up to 600 kg of counterfeit meat daily.

Olive oil

Spain will introduce expanded official controls and anti-fraud measures across its entire olive oil and pomace supply chain starting in 2026 to protect consumers and the sector's reputation. Inspections will cover producers, marketers, retailers and imports. At least 20% of operators will face quality checks annually, supported by digital traceability systems like SIMO and REMOA to monitor production and movement of oils. While industry proposals for voluntary self-controls were rejected, the new framework has broad regional support and aims to address gaps highlighted by recent European audits, with initial effects expected this olive oil season.

Confectionary

Several varieties of Jolly Rancher sweets sold in the UK have been urgently recalled after tests found them to contain mineral oil aromatic hydrocarbons (MOAH). Although Hershey stopped supplying the UK in 2024, the products continue to be imported. FSA has therefore requested enforcing authorities in the UK to take action to remove products from the market.

Pet food

A recent study found that dog food accounts for about 1% of the UK's total greenhouse gas emissions, with wet, raw and meat-rich products having much higher environmental impacts than dry kibble. The study of nearly 1,000 commercial dog foods found emissions from dog food production contribute up to 3.7% of UK food system emissions.

Ashwagandha

The WHO Global Traditional Medicine Summit raised concerns over widespread

adulteration and inconsistent quality of ashwagandha. Many products contain leaf material rather than roots, altering phytochemical profiles and potentially affecting safety and efficacy, with testing showing a majority of formulations containing leaf-specific compounds. The panel called for industry-wide adoption of root-only extraction, aligning with Indian government guidance that discourages the use of ashwagandha leaves due to insufficient safety and efficacy evidence.

Insider fraud case

A former Mars Wrigley executive, Paul Steed, was sentenced to 63 months in prison for stealing more than \$28 million through a series of long-running schemes that exploited gaps in Mars' financial and commodity systems. The case highlights that even well-controlled global companies remain vulnerable to insider fraud rooted in trust and system complexity.

AI consumer complaint fraud

A new form of fraud is emerging in which AI is used to manipulate photos of food to falsely support complaints and refund claims. Consumers have been editing images to make food appear undercooked, spoiled, mouldy, damaged or contaminated, then submitting them as evidence to delivery platforms such as Uber Eats, Deliveroo and Just Eat. Experts warn the same tactics could also be used against supermarkets and other food retailers, with manipulated images used to claim products were unsafe or of poor quality.

Amsterdam bans meat advertising

Amsterdam will become the first capital city to ban meat advertising in public spaces from 1 May, as part of efforts to promote healthier, lower-emission, plant-based diets. The ban reflects growing public and political support in the Netherlands for reducing meat consumption, which currently remains well above national dietary recommendations.

Knowledge Base Analytics — a powerful new tool designed to transform the way you analyse risk and performance data

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

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

Stay ahead of risks—start leveraging Knowledge Base Analytics this month! **Contact us** to arrange a demonstration.

Food Safety January

Country No of Alerts

France	72
Belgium	35
Canada	34
United Kingdom	29
United States	28
Turkey	23
Poland	19
China	18
Germany	17
India	15
Czechia	13
Netherlands	11
Spain	9
Egypt	9
Mexico	8
Italy	7
Iceland	6
Ukraine	6
Austria	5
Ireland	5
Luxembourg	5
Romania	5
Switzerland	5
United Arab Emirates	4
Norway	4
Argentina	4
Thailand	4
Uzbekistan	3
Pakistan	3
Afghanistan	3
Russia	3
Denmark	3
Nigeria	3
Sri Lanka	2
Greece	2
Sudan	2
Ecuador	2
Peru	2
Australia	2
Serbia	2
Morocco	2
Indonesia	2
Hungary	2
Armenia	1
Lithuania	1
Kenya	1
Syria	1
New Zealand	1
Vietnam	1
South Korea	1
Portugal	1
Latvia	1
Azerbaijan	1
Taiwan	1
Iran	1
Tunisia	1
Finland	1
Belarus	1
Sweden	1
Malta	1
Colombia	1
Brazil	1
Bangladesh	1
Israel	1

SUMMARY

There were **441 Red**, **17 Amber** and **1 Green** totalling **459 safety alerts and product recalls*** in January.

The majority of alerts were for bacterial pathogens and pesticides (27.9% and 13.1% respectively). Allergens were third with 12.4%.

128 Bacterial pathogen alerts (59% Salmonella, 21% Listeria); Bacillus cereus related posts at 12% due to infant formula concerns.

6- Pesticide alerts (22% Chlorpyrifos, 5% Ethylene Oxide).

Top 3 alerts by commodity

- 1. Ingredients:** Nuts & seeds; Herbs, spices; Rice, pasta & flour.
- 2. Produce:** Vegetables; Fruit; Dried fruit.
- 3. Prepared:** Sweets & desserts; Ready meals; Snacking.

Top 3 number of alerts by county of origin

- 1. France:** Sweets & desserts; Pate; Infant formula..
- 2. Belgium:** Vegetables; Herbs & spices; Sweets & desserts.
- 3. Canada:** Nuts & seeds; Ready meals; Vegetables.

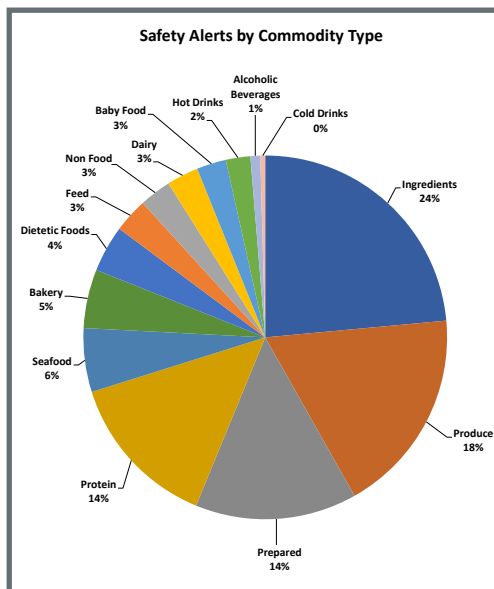
*Safety alerts & product recalls compiled from RASFF, FDA, AFSCA, CFIA, Rappel Consommateur, potraviny na pranyr, SFA, CFS, MPI, FSAI & Food Standards AU

Follow us on Social Media

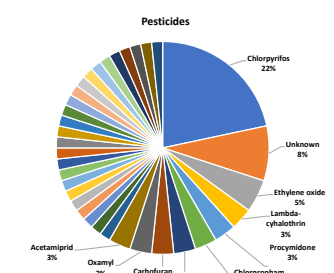
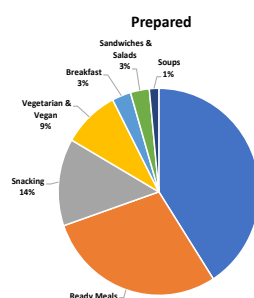
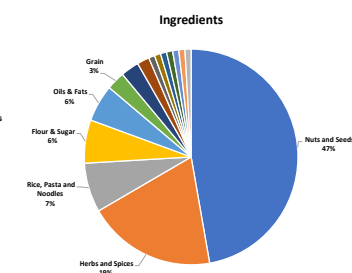
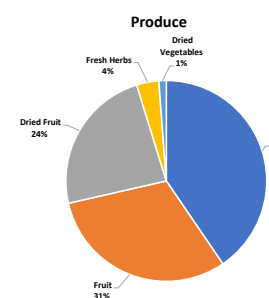
Food Forensics Ltd

@food_forensics

Contact us
For more information about Knowledge Base, Testing & other services.
+44 (0)1603 274456
info@foodforensics.co.uk
<https://www.foodforensics.co.uk/>

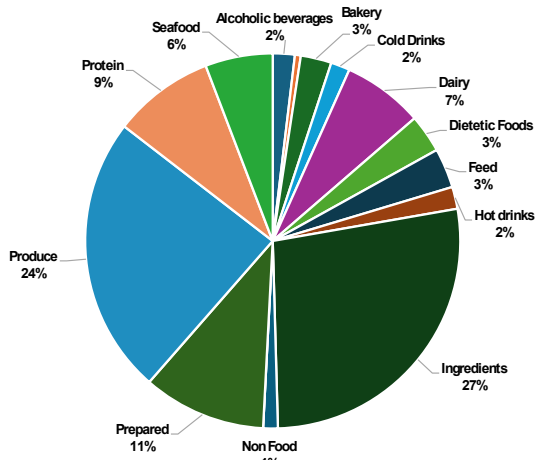


Total 587

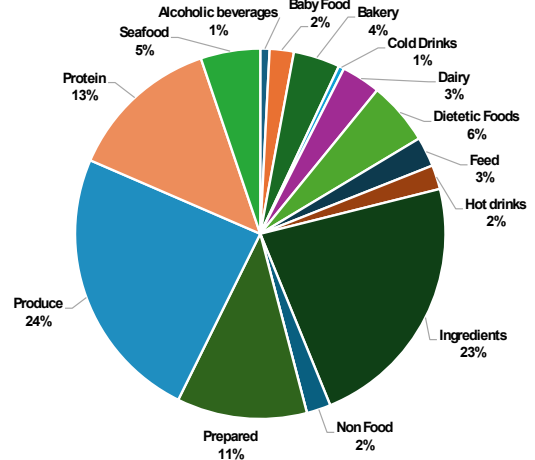


Knowledge Base Trends

Product Category Issues January 2025

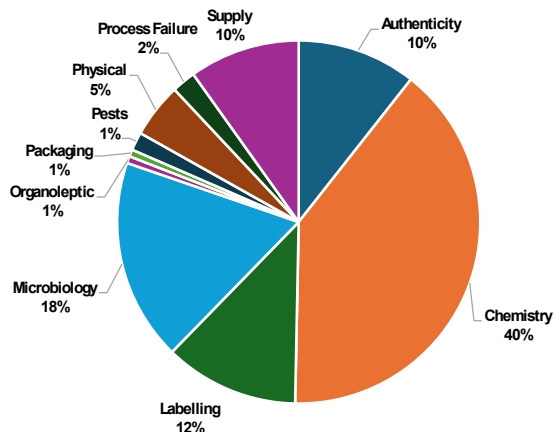


Product Category Issues January 2026

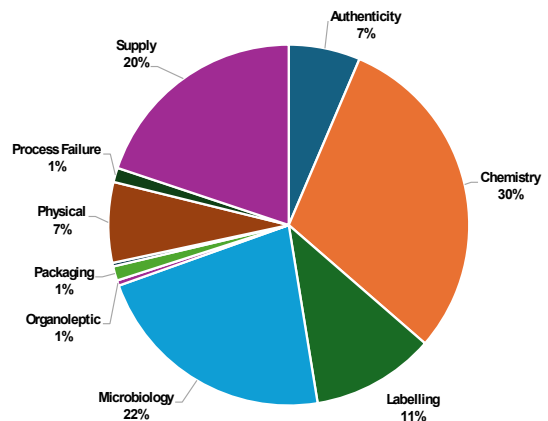


January 2026 has resulted in a similar product category profile to January 2025. A slight increase in the proportion of issues reported in protein, baby food and dietetic foods.

Category Reported Issues January 2025

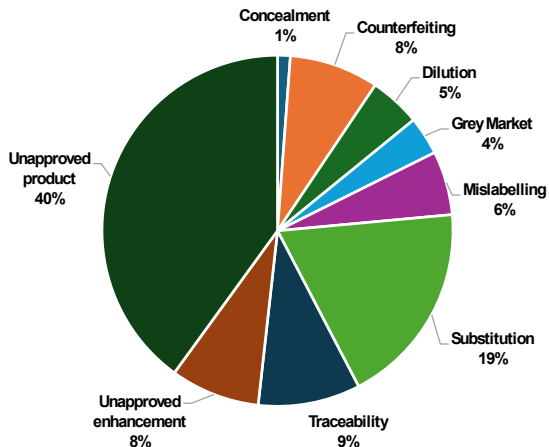


Category Reported Issues January 2026

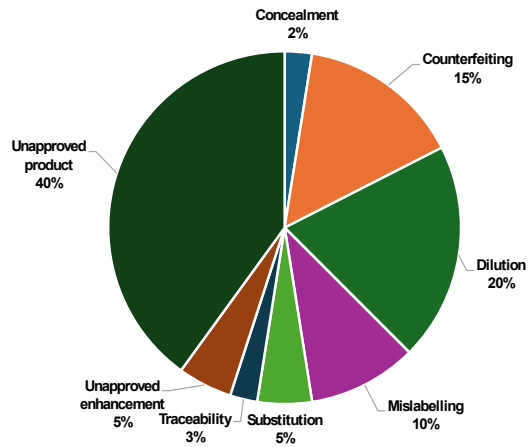


January 2026 has seen an increase in issues related to microbiology and authenticity with a large increase in reported supply issues.

Authenticity Issues January 2025



Authenticity Issues January 2026



The distribution of authenticity issues shows considerable differences between January 2025 and January 2026. Reports of dilution increased from 5% in January 2025 to 20% in January 2026 and counterfeiting from 8% in January 2025 to 15% in January 2026.

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

While Food Forensics seeks to ensure the information provided is accurate at the time of printing, no warranty is given in that respect. Food Forensics accepts no liability for loss, damage however so caused directly or indirectly in relation to information contained or omitted from this document. Food Forensics is an ISO 17025 UKAS accredited laboratory but production of the newsletter is outside the scope of the accreditation schedule. Name & Registered Office: Food Forensics Limited, 5 Frensham Road, Sweet Briar Industrial Estate, Norwich, NR3 2BT, UK. Company No. 07647866. © Food Forensics 2026