Food Forensics Risk Newsletter

March 2026

HIGHLIGHTS

- Severe February weather has caused flooding and damage to crops across France, Spain and Morocco tightening supply and increasing microbial risks.
- Morocco has introduced an indefinite ban on frozen sardine exports, tightening global supply and increasing substitution risk.
- Tunisia's record date harvest is facing export disruption due to Moroccan import quotas.
- Italian extra virgin olive oil prices remain at a significant premium despite seasonal easing, maintaining substitution risk.
- UK avian influenza cases continue to rise, with 94 confirmed H5N1 outbreaks so far this season.
- France's new zero-tolerance pesticide residue decree for certain imports has now come into force.

Produce

Citrus

Southern European citrus markets remain tight following earlier weather disruptions across Spain, Italy and Greece. Reduced yields combined with higher pest pressure are continuing to constrain availability. Reduced Spanish orange output is creating potential demand for Egyptian fruit, while lemons face already elevated prices due to a smaller Verna crop and delayed South African production. EU production of oranges and mandarins remains below seasonal norms, with pricing firm.

Florida's orange crop remains historically low due to citrus greening and hurricane damage. Although Brazil's improved crop outlook has softened global juice markets, production decline in Florida continues to underpin long-term supply risk.

Risk considerations: price volatility, juice concentrate substitution, authenticity of blended citrus products.

Top Fruit

Storms and severe weather in France have caused damage and flooding in several apple-producing areas, risking root suffocation and scab disease. The full impact is yet to be assessed. In South Africa, shipments of fruits including apples and pears have been delayed due to poor weather and logistical issues.

Risk considerations: quality deterioration.

Soft Fruit

Severe weather, storms and port disruptions in Morocco, Spain and South Africa are delaying shipments and causing shortages of berries across the UK and Europe. Cold conditions across Morocco and southern Spain have delayed harvest progression, reducing early volumes of strawberries and raspberries. Quality variability remains a concern, particularly mould incidence in strawberries following earlier severe rainfall.

Severe weather in Portugal has disrupted soft fruit production and infrastructure, with highway closures, suspended train services and some areas without water or electricity for over two weeks. The full impact on the upcoming blueberry season remains uncertain, putting the market under pressure.

Egypt's expanded strawberry production continues to pressure export pricing, increasing commercial strain across North African supply chains.

Risk considerations: quality deterioration, MRL compliance pressure, increased sorting/repacking risk.

Stone Fruits

After weeks of storms in southern Andalucia, stone fruit is at risk, with rainy, cold weather affecting early blossoms and pollination, prompting bumblebee releases.

Heavy rain in key South African fruit regions combined with delays at the Port of Cape Town are disrupting exports of stone fruit.

Risk considerations: quality deterioration.

Grapes

Ongoing wind and logistical problems at the Port of Cape Town have delayed South African grape exports, forcing vessels to skip ports and worsening container shortages. Importers warn of quality risks from delayed fruit, but expect a surge of up to 11 million boxes of South African grapes to arrive in Europe in the coming weeks, creating an oversupply situation that brings potential quality issues.

Risk considerations: oversupply, quality deterioration.

Bananas

Ecuador has confirmed the presence of Fusarium Wilt Tropical Race 4 (TR4) on a banana farm in El Oro and declared a phytosanitary emergency, raising serious risks for production and global trade. TR4 can wipe out entire farms and survives in soil for decades, making containment critical. As Ecuador supplies more than a quarter of the world's traded bananas, wider spread could disrupt exports, tighten global supply and increase costs. The industry's reliance on Cavendish bananas, which are highly susceptible, heightens long-term vulnerability.

Risk considerations: price volatility, tightened global supply.

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Pineapple

Adverse weather in Costa Rica and neighbouring countries continues to suppress crop yields into early 2026. With Costa Rica supplying approximately 90% of key markets, constrained supply is maintaining elevated prices. With pineapple juice stocks remaining tight bottlers may increase usage of alternative fruit concentrates where economically viable.

Risk considerations: substitution with orange or mango concentrates, authenticity testing requirements.

Mango

Peruvian mango growers remain under financial pressure following earlier strikes linked to low farmgate prices and export oversupply. Continued rainfall is increasing disease pressure in some regions.

The mango season in Côte d'Ivoire has been adversely affected by low rainfall and difficult weather conditions, leading to reduced fruit growth and lower production volumes in recent seasons. Producers and exporters report that a lack of rain has slowed fruit development and decreased yields compared with previous years.

Risk considerations: quality issues, pesticide compliance, distressed supply chain behaviour.

Salad crops

Weather-related disruption across Spain, Turkey and Morocco continues to impact tomatoes, peppers, cucumbers and leafy crops. Storm damage, greenhouse flooding and reduced light levels are limiting yields and shelf life. With Spain traditionally supplying a large proportion of winter cucumber imports, this shortage has left markets in Belgium, the Netherlands, Germany and other countries with very tight availability and high demand relative to supply. High prices and supply tightness are likely to persist until later in the season, with forecasts pointing to a gradual normalisation as northern European greenhouse production increases after Easter.

UK growers face significant cost increases from higher electricity standing charges, potentially resulting in retail price increases or reduced domestic production.

Risk considerations: short shelf life, fungal diseases, quality complaints, increased imports from alternative origins.

Potatoes

Across Northern Europe, large surplus stocks and weak processing demand are keeping prices low, with some potatoes cleared for feed at little or no cost. Contract prices are down as much as 20%, and area reductions of up to 10% are possible.

A herbicide-resistant strain of potato late blight, genotype EU43, has been detected in the UK for the first time. It was found on Volunteer potatoes in Suffolk last autumn and confirmed through molecular testing. This discovery raises concerns for UK potato growers, as EU43 is resistant to standard fungicide treatments, potentially complicating disease management and requiring careful monitoring and updated control strategies.

Risk considerations: quality issues, fungal diseases.

Tomatoes

Growers in Morocco face mildew and TBRV (Tomato Brown Rugose Virus) outbreaks due to humidity after heavy rains. European exports are hampered by lower yields, shipping delays and port congestion, leading to poor product condition upon arrival. The government has declared the drought over, but farmers now need to select crop varieties resilient to drought and heavy rainfall.

Tomatoes in Pakistan, a key crop worth over $100 million in exports, are increasingly threatened by heavy metal contamination from industrial activity, especially tanneries in Sialkot, Kasur and Lahore. Heavy metals such as chromium, cadmium and lead are entering irrigation systems and soils, accumulating in tomato fruits, posing health risks and potentially reducing yields by up to 50%. Researchers are exploring bioremediation using microbes and plants to detoxify soils, particularly targeting cadmium, with the aim of preventing metal uptake in tomatoes and potentially recycling extracted metals.

Risk considerations: quality deterioration, fungal diseases, MRL compliance, heavy metal contamination.

Asparagus

Storms, cold weather and heavy rain have disrupted field operations in key French and Spanish asparagus producing regions. As a result, the French asparagus season has been pushed back by around 2 - 3 weeks in many areas, with the South-East and South-West regions reporting significant delays. In central regions of France, fields remain boggy and inaccessible, postponing ridging and delaying expected outdoor harvest starts into mid-March or later. Only the northernmost regions of France where earlier field work typically occurs later in the season have been less affected so far. In Granada, about one-third of green asparagus fields are reportedly flooded with growers estimating a 25 - 30% loss. These delays may compress regional production timelines, potentially causing overlaps between harvests and affecting market availability and timing.

Risk considerations: short shelf life, quality deterioration, increased imports from alternative origins.

Ginger & Garlic

Garlic pricing in North America is currently mixed due to a combination of supply and market disruptions. Cheap Argentinian garlic, normally destined for Brazil, is being redirected to Mexico and the US after Brazil cut anti-dumping taxes on Chinese garlic, creating market oversupply. Early Mexican purple garlic is starting soon, while illegal shipments of Chinese garlic routed through other countries undercut legal imports.

Risk considerations: origin fraud due to market oversupply.

Avocado

Flooding in northern Morocco has severely affected avocado production and caused widespread fruit drop. Strong winds and persistent rain have damaged trees, and in some cases entire trees have died due to asphyxiation from prolonged flooding. Growers report that volumes remaining to be harvested have been significantly affected, and for many producers the season has effectively ended early with heavy losses in both fruit and orchard infrastructure. The combined effect of heat stress earlier in the season and recent flooding is expected to significantly reduce Morocco's avocado exportable volumes for 2025/2026, potentially well below pre-season forecasts.

Risk considerations: quality issues, pesticide compliance.

Herbs & spices

Pepper & Turmeric: Vietnamese pepper prices remain elevated ahead of the 2026 harvest, supported by tight global supply and strong export demand. Concerns over Indian turmeric crop quality and size have pushed prices higher.

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A Botanical Adulterants Prevention Program (BAPP) review on turmeric adulteration reported that approximately 20% of turmeric products worldwide are adulterated, based on data from 48 studies covering more than 2,200 samples. Adulteration rates vary by region and product type, with higher levels in parts of Asia and in turmeric supplements, while Europe and North America show lower rates. Common adulterants include starches, synthetic dyes and synthetic curcuminoids, with lead chromate now less common than in the past.

Risk considerations: increased incentive for adulteration, foreign origin mixing, artificial colouring.

Ginseng & Ashwagandha: A BAPP review found that nearly 25% of tested ginseng products showed adulteration, often through substitution with cheaper species. WHO discussions have raised concerns regarding ashwagandha products containing leaf material rather than root, affecting phytochemical consistency and potentially safety.

Risk considerations: species substitution, undeclared plant parts, pharmaceutical contamination.

Nuts

Global pistachio production for 2025/26 is projected to fall 8% to 1.1 million metric tons, with declines in Turkey, Iran and Syria outweighing gains in the United States. (US production is set to surge 43% due to the on-year of the alternate bearing cycle). Lower supply is expected to reduce global consumption by 4%, while risks of substitution due to tight global supply need to be considered.

Recent reports indicate that cool and wet weather conditions in California's Central Valley are raising concern for the 2026 almond crop, particularly around pollination and bloom timing. California accounts for about 80 % of US almonds and roughly 80 % of the world's supply, making these weather events relevant to global almond availability and market dynamics. The Australian almond industry, however, has reported a record crop of 7% higher than last year due to favourable growing conditions.

Risk considerations: origin misdeclaration, species substitution, artificial colourings.

Dried Fruit

Egypt's export quota of 5,000 tonnes of dates to Turkey for 2026 has nearly been filled just six weeks into the year. Strong demand, particularly for Medjool dates ahead of Ramadan, has repeatedly pushed Turkish quotas to their limits. Exporters report that demand exceeds supply, aided by improved quality and size of this year's crop, and are urging Turkish authorities to double the quota to 10,000 tonnes. While Egypt can still sell dates to other markets in the EU, the current quota system is expected to constrain Turkish exports for the rest of the year, a challenge that will grow as production rises and Ramadan occurs earlier in the calendar.

Risk considerations: supply fluctuation.

Cereals

Grain markets remain broadly stable, supported by strong global supply, although recent winter storms have raised concerns about frost damage in US and Russian regions.

A new strain of yellow rust, a fungal disease, has emerged that overcomes a major genetic resistance gene (Yr15) used in many UK wheat varieties. This breakdown in resistance means more than half of the UK's wheat crop is now vulnerable to infection.

Reports continue of grain harvested from occupied Ukrainian territories being exported as Russian origin, raising traceability and geopolitical compliance concerns.

Risk considerations: origin misdeclaration, sanctions compliance, fungal disease.

Coffee

Arabica coffee futures have dropped to around $2.80 per pound, near their lowest since July 2025 and over 30% below November highs, as global supply expectations improve. Brazil’s crop forecast predicts a record 66.2 million bags for 2026/27 due to favourable rainfall, while higher exports from Vietnam and recovering inventories ease prior supply tightness. Despite some short covering from a stronger Brazilian real, market sentiment remains weak amid expectations of a potential surplus.

Risk considerations: price fluctuation, blend reformulation.

Cocoa

Cocoa prices have eased from 2025 highs as improved rainfall in West Africa boosted crop conditions, but the market remains volatile due to oversupply and weak demand. Buyers in Ivory Coast and Ghana are reluctant to pay official farm-gate prices, pushing ICE inventories to a 5.25-month high. Ghana has cut farmer prices by nearly 30%, while the Ivory Coast may reduce prices by 35% for the mid-crop harvest.

Favourable weather has improved pod size and quality, and Nigerian exports rose 17% year-on-year. Grinding reports from Europe, Asia, and North America show weak demand, while chocolate makers like Barry Callebaut report declining sales. Despite slower port deliveries in the Ivory Coast and an expected 11% drop in Nigerian output, global cocoa surpluses are expected for 2025/26 and 2026/27, keeping the market under pressure.

Risk considerations: long-term supply instability, potential quality variance in lower-cost sourcing.

Acacia gum

Conflict in Sudan continues to disrupt global acacia gum supply. As Sudan accounts for the majority of global production, traceability challenges and tight supply persist. Diversification into neighbouring countries remains limited.

Risk considerations: supply shortage, authenticity, functionality substitution risk.

Honey and Syrups

Recent storms in New Zealand's upper North Island have prevented many beekeepers from accessing their hives during the critical mid-harvest period. This disruption is expected to lead to a lighter and delayed honey harvest. Moisture from the storms has also impacted nectar production, further challenging honey yields. Industry leaders report national honey production is down this year.

A dead nest of the yellow-legged hornet (the first confirmed discovery in Wales) has been found near Wrexham. The invasive Asian hornet poses a significant threat to honeybees and other pollinating insects, which are vital for beekeeping and honey production. Since its first detection in France in 2004 and later in England in 2016, efforts have been ongoing to find and destroy nests to protect bee populations.

Risk considerations: supply shortage, authenticity, substitution risk.

Oilseeds

In 2025, sunflower seed processing in the EU dropped to a nine-year low of 7.4 million tonnes, down 18% from 2024. This decline was driven by a smaller EU harvest, farmers holding back sales and disrupted exports from Ukraine. Although there was a seasonal increase in the last quarter, it was not enough to offset the annual decrease. Lower margins led many EU plants, especially in the Netherlands, France and Bulgaria, to shift capacity toward more profitable crops like rapeseed. Rapeseed processing in the EU rose 5% year-on-year to 6.6 million tonnes in the final quarter, supported by ample global supply and better profitability.

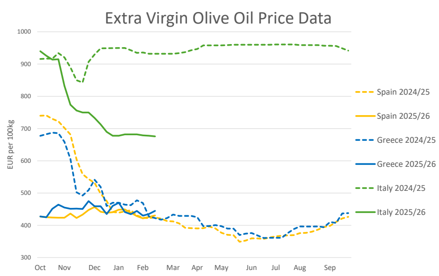
Risk considerations: supply shortage, authenticity, origin mislabelling.

Olives & Olive oils

Although Italian EVOO prices have eased compared to last season, they remain at a substantial premium over Spanish and Greek oils. This persistent differential maintains substitution and blending risk.

The European Court of Auditors has highlighted weaknesses in EU olive oil conformity checks and traceability systems. Spain is introducing expanded anti-fraud controls across the olive oil supply chain in 2026, including digital traceability systems.

Risk considerations: origin mislabelling, undeclared blending, dilution with lower



grade oils.

Protein

African Swine Fever (ASF)

Spain's recent ASF cases in wild boar appear linked to a new, less virulent variant. Ongoing monitoring continues.

Concerns have emerged regarding the effectiveness of UK border controls following the recent discovery of products from a Vietnamese company implicated in an African swine fever (ASF) scandal being sold within the UK. Ha Long Canned Food JSC was found to have used ASF-infected pork in canned pâté and other products, with substantial quantities of contaminated meat identified by Vietnamese authorities last autumn. Despite these findings, the company's products remained available in UK retail outlets until a few weeks ago, only being withdrawn following reports in the Vietnamese media and subsequent retailer action. The incident has raised questions about the adequacy of UK biosecurity measures and import surveillance.

Risk considerations: regional trade restrictions, pork supply volatility, biosecurity.

Avian Influenza (HPAI H5N1)

UK HPAI cases continue to increase in the 2025–26 season, with 94 confirmed outbreaks to date. Protection and surveillance zones remain in force in multiple regions. EFSA reports record levels of HPAI outbreaks among wild and domestic birds in Europe, with expert assessments indicating the season may extend into late winter.

Risk considerations: supply volatility, egg and poultry price pressure, biosecurity compliance.

Blue-tongue virus (BTV-3)

There have been 299 cases of bluetongue in Great Britain since July 2025 with no cases in Scotland. Overall, the risk of new virus introduction from all sources is considered medium, while airborne incursion is now negligible.

Lumpy Skin Disease

France appears to be emerging from its eight-month lumpy skin disease outbreak, with no new cases reported since January 2. The large-scale vaccination campaign launched in December in the southwest successfully immunized nearly two million cattle across ten departments, significantly reducing the risk of further spread.

Sheep & Goat Pox

Greece continues to manage widespread sheep and goat pox outbreaks, with extensive culling measures in place.

Risk considerations: regional lamb and goat supply constraints.

Dairy

In 2025, UK dairy exports reached a record £2.2 billion, up 16.6% year-on-year, with total volumes rising 9.1% to 1.35 million tonnes. There was export growth across almost all products, led by milk, milk powders, whey, cheese and butter. The EU remained the dominant market, accounting for nearly 74% of export value, while non-EU markets including UAE, China and Morocco also grew strongly. The Gulf Cooperation Council became the largest non-EU market at £99 million, followed by the USA at £97.2 million, with notable gains in Malaysia, Hong Kong and Singapore.

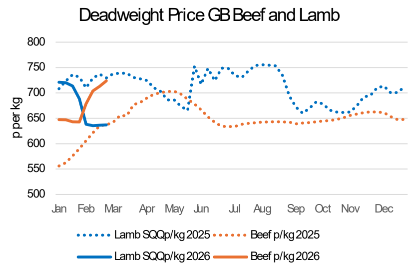
Lamb & Goat

AHDB report that UK consumers have been increasingly shifting toward lamb as the price gap with beef narrowed in January. February figures show deadweight lamb prices to have sharply fallen to 87p/kg less than beef . Retail lamb inflation in December 2025 was 8%, slightly below the three-year average, yet volumes purchased rose 3.8% and spend increased 5.4%, reflecting movement toward more affordable lamb products.

Risk considerations: species substitution.

Beef

The price difference between beef and lamb has inverted sharply since mid January with deadweight beef now around 87p/kg higher than lamb. The risk of substitution is significant, as ongoing beef price inflation makes lamb an attractive



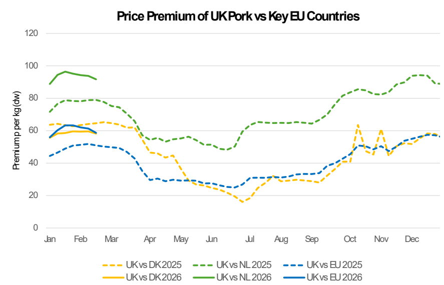
alternative.

Risk considerations: species substitution.

Pig Meat

UK pork continues to hold a premium price over key EU countries although this differential has shown a decline during February 2026. The high price premium of UK pork versus pork from the Netherlands (approximately 12p/kg higher than the same period in 2025) makes the risk of substitution worth considering. Overall, deadweight pig prices have shown a decline with UK pork 13.6p/kg and EU pork 20.41p/kg less than the same period in 2025.

Risk considerations: origin substitution.



Chicken & Turkey

Brazil remains under restrictions on poultry exports to the EU following a HPAI outbreak, affecting global protein trade flows and highlighting ongoing disease risk impacts.

AVEC, representing 95% of European poultry production, is urging the EU to suspend poultry imports from China after an EC audit found that Chinese controls fail to guarantee animal welfare, hygiene, traceability and certification reliability. Imports from China rose over 30% in 2025 to around 50,000 tonnes.

Risk considerations: origin clarity/ mislabelling, food safety, traceability.

Egg Layer

The NFU has expressed concerns over the UK government's proposed ban on all cages for laying hens, pullets, and breeder layers. The consultation, open until 9 March 2026, would prohibit new cage installations from January 2027 and require existing colony cage producers to transition to cage-free systems by 2032. NFU officials argue that enriched colony cages provide an affordable, nutritious, and environmentally beneficial source of eggs, and that banning them could increase imports from countries with lower welfare and safety standards.

Risk considerations: origin clarity/ mislabelling, food safety, traceability.

Cod & Haddock

EU sanctions continue to reshape Russian whitefish trade flows, increasing European reliance on Norwegian supply and tightening availability.

Risk considerations: origin substitution, price volatility.

Pollock

EU trade data shows that tens of thousands of metric tons of pollock fillets exported from China to Europe are being recorded as Russian-origin in official statistics. The shift appears linked to customs origin rules determining whether processed fish retains the origin of where it was caught (often Russia) despite being processed in China. The classification has implications for tariffs, compliance and sourcing strategies amid EU trade measures targeting Russian seafood.

Risk considerations: origin traceability.

Sardines

Morocco has introduced an indefinite ban on frozen sardine exports to stabilise domestic supply and protect declining stocks. As sardines represent over half of Morocco's wild catch, this move is expected to impact global canned and frozen markets.

Risk considerations: substitution with alternative species, labelling accuracy.

Salmon

Mowi reports that global salmon consumption reached a new record in Q4 2025, with demand growing approximately 8% year-on-year in the quarter and around 5% across the full year. The company expects this strong consumption trend to continue, while forecasting relatively limited global supply growth of just 1 - 2% annually in the coming years. As a result, demand is set to outpace supply, potentially tightening market balances.

Risk considerations: supply-demand imbalance, species substitution.

Fishmeal and fish oil

Global production of fishmeal and fish oil increased in 2025, according to the International Fishmeal and Fish Oil Organisation (IFFO), despite declines in key regions such as Peru and parts of the North Atlantic. Peru, the world's largest producer, experienced reduced output due to environmental challenges such as warmer ocean temperatures and strict fishing quotas aimed at sustainability. However, increased production in Asian countries including China and Thailand, along with gains in certain European nations, helped offset these declines. The overall rise in production supports the expanding aquaculture industry, which depends heavily on fishmeal and fish oil for feed.

Risk considerations: sustainability, environmental impact.

Animal Food

Pet-food RASFF Alerts & Recalls

GO Raw LLC recalled cat food due to the presence of low thiamine levels.

Elite Treats LLC recalled chicken pet food due to the presence of Salmonella.

Go Raw LLC recalled cat food due to lower levels of Vitamin B1 than declared.

Copper and Zinc exceeded legal limits in cat food from Italy.

Salmonella detected in pet food from China.

France recalled dog chews due to the presence of Salmonella.

A UK Food Standards Agency (FSA) survey found that 35% of raw pet food products tested between March 2023 and February 2024 contained harmful bacteria, including Salmonella, Campylobacter and *E. coli*, while 29% failed to meet legal safety standards. The findings highlight risks to both pets and humans. The FSA stressed that proper hygiene when handling, storing and preparing raw pet food can reduce the risk of illness. The agency is working with local authorities and the industry to reinforce safety responsibilities, and the survey may prompt greater focus on sourcing, hazard analysis, monitoring and consumer guidance in the growing raw pet food sector.

Risk considerations: food safety.

General

Environmental

The UK Government report 'Global biodiversity loss, ecosystem collapse and national security: a national security assessment' warns that accelerating global ecosystem degradation poses a serious and growing threat to UK security and prosperity, already contributing to crop failures, natural disasters and disease outbreaks and likely to worsen beyond 2050. Cascading impacts could include geopolitical instability, economic insecurity, conflict, migration and competition for resources. While the timing of ecosystem collapse is uncertain, some ecosystems could begin failing from the 2030s. The UK is particularly vulnerable due to its reliance on food and fertiliser imports, and without greater resilience in its food system and supply chains, maintaining food security would be difficult amid rising global competition.

Global Seafood Fraud

A major FAO report released in February 2026 warns that around 20 % of global fisheries and aquaculture products may be subject to fraud, with mislabelling rates as high as 30 % in some restaurant and processed product sectors (e.g., tuna and salmon misidentification). It highlights that misrepresentation of geographic origin or species is driven by economic incentives and poses sustainability and human health risks. The report underscores persistent traceability and authenticity gaps in global seafood supply chains. Separately, technical reports show that species substitution and mislabelling remain prevalent in the aquatic sector, particularly where visual identification is difficult (e.g., processed products and restaurant menus).

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Illegal, unreported, and unregulated (IUU fishing)

As of 10 January 2026, new EU Illegal, Unreported, and Unregulated fishing (IUU) requirements came in to force. UK seafood exporters will need to provide additional information on Catch Certificates including fishing trip dates and gear type plus additional IUU documentation.

Animal welfare

Defra consultations on phasing out enriched cages for laying hens and improving lamb welfare standards remain open until early March. Industry groups have expressed concerns over competitiveness versus imports.

Eighteen major hospitality brands, including Burger King, Nando's and KFC, have withdrawn from the Better Chicken Commitment (BCC) and formed a new industry group, the 'Sustainable Chicken Forum' (SCF). The companies claim the requirement to switch to slower-growing breeds is no longer the right approach, citing concerns over higher emissions, water use, reduced production capacity and ongoing supply pressures. Animal welfare group Compassion in World Farming criticised the move as a setback, rejecting claims that higher-welfare breeds harm environmental or food safety outcomes.

UK retailer Tesco has suspended purchases from a second Bakkafrost salmon farm in Scotland after a viral video showed dead fish being pushed into the sea, raising serious environmental and fish welfare concerns. Environmental groups are calling for a full boycott of Bakkafrost's Scottish salmon, urging stronger regulations and transparency in the aquaculture industry. The incident highlights growing pressure on salmon farming companies to improve sustainability and animal welfare practices.

Worker's rights

A new study shows that migrant fishers' deaths at sea stem from systemic labour and governance failures, not isolated safety lapses. Indonesian workers on distant-water fishing vessels - mainly under flags of China, Taiwan or South Korea, face extreme risks, with captains controlling food, medical care, wages and death records. Researchers documented 55 cases, showing fatalities occur through both direct abuse and prolonged neglect.

Since 2013, Chile's fish farming industry has seen 90 worker deaths, including a recent tragedy where six men died aboard a support vessel. Despite being a vital economic sector, recurring accidents highlight ongoing safety issues, such as inadequate equipment and training.

Labour shortage

Spain has approved a royal decree to regularise around 500,000 undocumented migrants, granting them residence and work permits if they arrived before 31 December 2025, have no criminal record and can prove at least five months' residence. The move has been widely welcomed by farmers and other labour-dependent sectors as a way to ease chronic worker shortages and formalise informal employment. The decision sets Spain apart from the more restrictive migration trend elsewhere in Europe and contrasts sharply with policies in the United States.

Human trafficking

A US appeals court has reinstated a human trafficking lawsuit against High Liner-owned Rubicon Resources and Thai shrimp suppliers, overturning a previous dismissal. The company is charged with knowingly benefiting from forced labour ventures. The case, brought by Myanmar migrant workers alleging forced labour in Thailand's shrimp sector. The ruling highlights growing legal risks for seafood companies sourcing from high-risk supply chains.

Severe February weather

Severe weather has featured highly in risk reports for February 2026. Heavy rainfall, storms, strong winds and flooding have significantly affected agricultural production across Europe, Morocco and South Africa. Port disruptions and infrastructure damage have delayed agricultural produce shipments. Across these regions, the extreme weather has put pressure on supply chains, increased operational costs and is expected to drive up market prices, highlighting the vulnerability of agricultural systems to climate extremes and the need for improved risk management and adaptive strategies.

Tariffs

Ongoing US trade pressure on UK standards and wider geopolitical tariff threats continue to create uncertainty across agri-food trade flows.

Logistics

Global container availability remains heavily weighted toward standard dry containers, which account for around 90% of the world fleet. However, shortages are emerging in non-standard equipment such as refrigerated (reefer) containers, flat racks, open-top units and tank containers. These specialist units are essential for transporting temperature-controlled food products, liquids, bulk ingredients and oversized processing equipment.

For food businesses, constrained access to reefer and specialist containers may result in shipment delays, higher freight rates, reduced sailing options and increased risk to cold chain integrity. Perishable imports such as fresh produce, meat, dairy, seafood and frozen goods are particularly exposed. Disruption can also affect ingredient sourcing timelines and inventory planning, especially where just-in-time models are used.

French pesticide controls

France has enacted a new ministerial order suspending the import and sale of certain non-EU fruit and vegetable products containing detectable residues of five banned pesticide active substances, even where EU MRLs exist. The tolerance level is set at laboratory detection limits.

Risk considerations: rejected shipments, enhanced residue testing, increased scrutiny on Egyptian and other non-EU produce.

PFAS

The UK is launching a plan to tackle harmful 'forever chemicals' (PFAS), which persist in the environment and may pose health risks. The plan includes increased testing, public awareness efforts and working with industries to find safer alternatives. The government aims to align with stricter EU rules by 2029, which seek to ban non-essential uses of PFAS. While environmental groups want faster action, some industries warn alternatives are limited. The water sector calls for a full ban on PFAS production to reduce pollution and treatment costs. The plan is a significant step toward addressing this widespread chemical issue. The plan is available to view via this link: PFAS Plan.

NFCU and wider industry reporting on fraud risks and illegal imports

Recent commentary highlights strengthened powers for the UK National Food Crime Unit (NFCU) and ongoing concerns about illegal meat imports and other fraud vectors that could pose biosecurity and supply chain integrity issues. Ongoing industry warnings on illegal meat imports and biosecurity gaps highlight the underlying, persistent food crime threats.

IN THE NEWS: February

Baby Food

Multiple infant formula brands from Nestlé, Danone and Lactalis have been recalled across 50–60+ countries due to the potential presence of cereulide toxin linked to *Bacillus cereus* and traced to a supplier's ingredient. French authorities are investigating associated infant illnesses and UK regulators continue updating recall notices.

Seafood

Waitrose has announced it will suspend sales of fresh, chilled, frozen and eventually tinned mackerel due to concerns about overfishing in the North East Atlantic. It will stop sourcing the fish by 29 April and will only resume sales if it meets its responsible sourcing standards.

Meat

The FSA's NFCU urging stronger fraud checks after the jailing of an individual linked to £500k poultry theft, highlighting that theft, diversion and subsequent labelling irregularities remain part of the broader food crime landscape.

Olive oil

Italian authorities seized over 18 tonnes of olive oil fraudulently declared as 'extra virgin' destined for export to Canada. Analyses revealed that the oil was virgin olive oil of lower quality. Although the packaging indicated 'EU origin' the product was found to be a blend of oils from both EU and non-EU sources.

Police in Greece, dismantled a criminal syndicate producing and selling adulterated oil labelled as 'extra virgin olive oil' which was a mix of sunflower oil and chemical dyes designed to mimic the appearance of authentic extra virgin olive oil. It was accompanied by forged certificates claiming false quality and origin. This case reflects ongoing issues with olive oil fraud in Europe, where mislabelling and adulteration of lower-cost oils continues.

Spices

An inspection of a spice grinding mill in Madhya Pradesh, India found coriander powder was being mixed with husk (bran) and sawdust to increase volume and cut costs. Authorities seized 40kg of coriander powder, 30 kg of garam masala, 30 kg of bran (husks) and 40kg of sawdust, along with whole spices stored on the premises.

In Gwalior (India), a fake spice racket was uncovered where fennel seeds coated with cement, chemicals and artificial colouring were sold as 'cumin'. The fake cumin was sold at lower prices, tempting retailers and consumers.

Fraud spikes in nuts, dairy & cereals

Global food fraud tracking indicates sharp increases in fraud incidents in nuts, dairy and cereals in Q1 2025, signalling emerging risk categories beyond traditional fraud focus areas.

Pet food

A laboratory review analysed dog food products including dry kibble, air-dried, freeze-dried and fresh/frozen varieties for contaminants such as heavy metals (lead, arsenic, mercury, cadmium), plastic-linked chemicals (phthalates) and acrylamide. On average, the heavy metal content was 3 to 13 times higher than levels seen in human foods tested over the past decade by the same group. The highest contaminant levels were generally found in dry kibble, with dry dog foods showing significantly elevated levels of lead, mercury, arsenic and cadmium compared with fresh or frozen products.

Dairy

The death toll in a milk adulteration incident in Andhra Pradesh, India, has risen to six after two more victims including a six-year-old boy died from renal failure. Seven others remain in critical condition and are undergoing treatment in hospital.

Out-of-date food

Asda has been fined over £500,000 for repeatedly selling out-of-date food at its Barnsley superstore. Trading standards officers seized nine chilled products that were a total of 91 days past their use-by dates in June 2024. The company pleaded guilty to five offences. Previous inspections had found 32 out-of-date items totalling 581 days past their dates. Asda has since introduced new checking systems, retraining and increased audits.

Weather

Severe storms caused widespread damage to crops in southern Italy, hitting Sicily, Sardinia and parts of Calabria. Torrential rain and high winds destroyed citrus, artichokes, leafy vegetables, bananas and other produce.

Europe

The European Commission's Food Fraud Summary for January 2026 lists incidents across meat, milk, alcoholic beverages, cereals and fish. The data shows ongoing suspected fraud cases involving unauthorised meat operators and illegal extension of shelf life for beef products, pointing to persistent traceability and compliance issues in meat supply chains.

Iranian conflict

The escalating conflict involving Iran is increasing risks to global food and fertiliser supplies, largely through energy and trade disruptions. Oil shipments through the Strait of Hormuz are vulnerable, threatening higher fuel and transport costs, while the Middle East's key role in nitrogen fertiliser exports raises concerns about input shortages and rising production costs for crops such as wheat, corn and soybeans.

Shipping delays and route disruptions are already affecting trade flows, including Indian rice exports to Iran, and could push up prices for staples like wheat, rice and vegetable oils. Reduced Iranian export availability may also increase dried fruit prices in South Asia. If the conflict intensifies, the combined pressure from energy, fertiliser and logistics constraints could worsen food inflation and food insecurity, particularly in import-dependent regions.

Food Safety February

Country	No of Alerts
France	101
Belgium	29
Canada	24
United States	24
Czechia	23
United Kingdom	22
Turkey	20
China	20
Germany	16
Poland	15
India	14
Netherlands	12
Italy	12
Spain	11
Ireland	9
Vietnam	8
Romania	7
Ukraine	7
Egypt	7
Australia	6
Brazil	6
Luxembourg	6
Austria	6
Iceland	5
Pakistan	5
Sweden	5
Georgia	4
Croatia	4
Colombia	4
Switzerland	4
Bangladesh	4
Morocco	4
New Zealand	4
Mexico	4
Ecuador	3
Hungary	3
Finland	3
Slovenia	2
Hong Kong	2
Venezuela	2
Denmark	2
Bulgaria	2
Greece	2
Burkina Faso	2
Argentina	2
Jordan	2
Syria	2
Thailand	2
Iran	2
Tanzania	2
Israel	2
Nigeria	2
Myanmar	2
Norway	2
Uzbekistan	2
Kenya	2
Estonia	1
Jersey	1
United Arab Emirates	1
Togo	1
Paraguay	1
South Africa	1
Albania	1
Peru	1
South Korea	1
Lithuania	1
Afghanistan	1
Ghana	1
Moldova	1
Taiwan	1
Serbia	1
Cambodia	1
El Salvador	1
Chile	1
Belarus	1
Indonesia	1
Burundi	1
Bolivia	1
Sudan	1
Madagascar	1
Singapore	1
Total	**524**

SUMMARY

There were 497 Red, 27 Amber and 0 Green totalling **524 safety alerts and product recalls*** in February.

The majority of alerts were for bacterial pathogens and pesticides (28.8% and 14.5% respectively). Allergens were third with 10.5%.

151 Bacterial pathogen alerts (53% Salmonella, 26% Listeria): *Bacillus cereus* related posts at 10% due to infant formula concerns. 76 Pesticide alerts (22% Chlorpyrifos, 9% Acetamiprid)

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

Top 3 alerts by commodity

1. Ingredients: Nuts & seeds; Rice, pasta & noodles; Herbs & spices.
2. Produce: Vegetables; Fruit; Dried fruit.
3. Prepared: Chicken; Sausage; Beef.

Top 3 number of alerts by county of origin

1. France: Fish; Cheese; Pork.
2. Belgium: Chicken; Rice, pasta & noodles; Nuts & seeds.
3. Canada: Chicken; Snadwiches & salads; Nuts & seeds.

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

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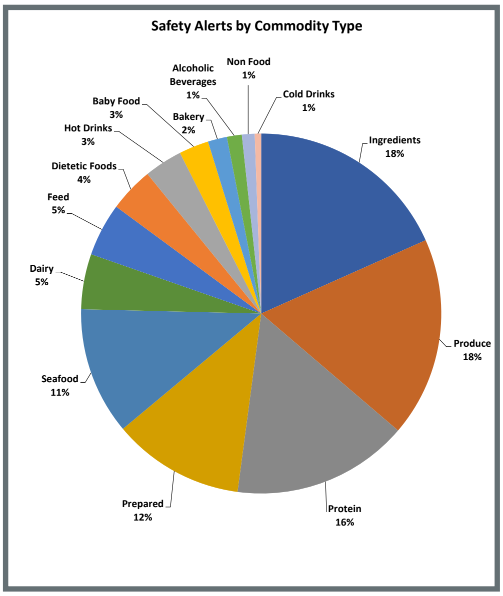
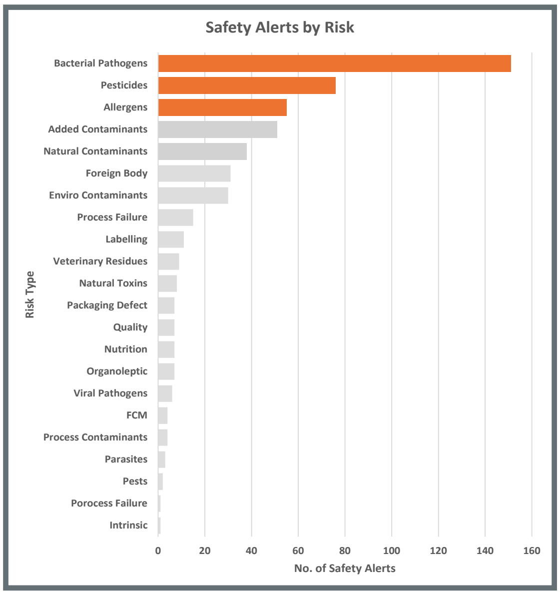
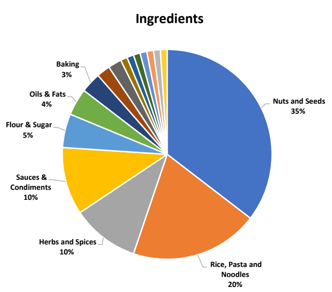
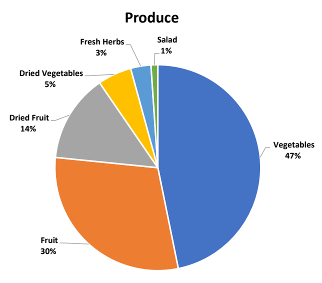
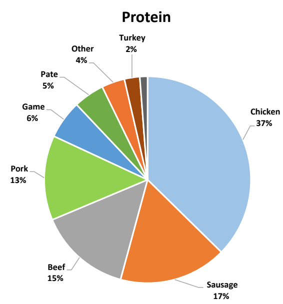
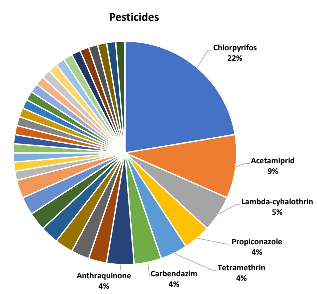






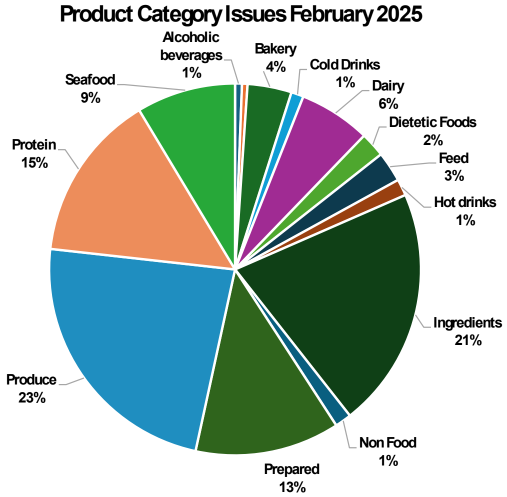




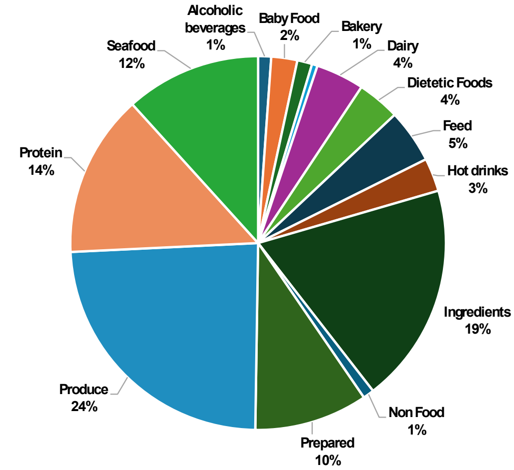


Knowledge Base Trends

Product Category Issues February 2025

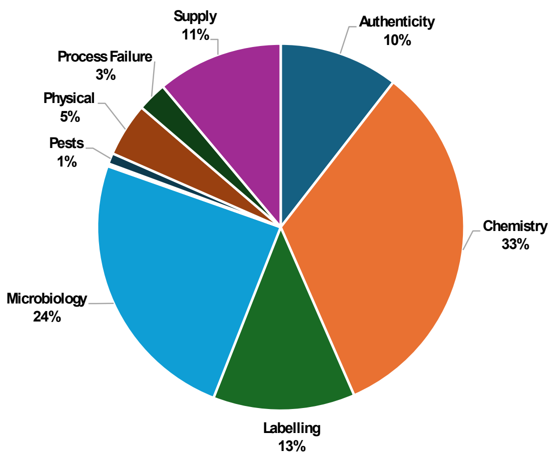


Product Category Issues February 2026

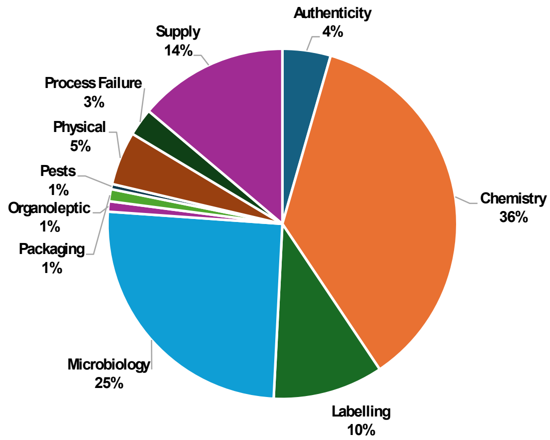


February 2026 has resulted in a similar product category profile to February 2025 with an increase in the proportion of issues reported in produce, seafood, baby food and hot drinks.

Category Reported Issues February 2025

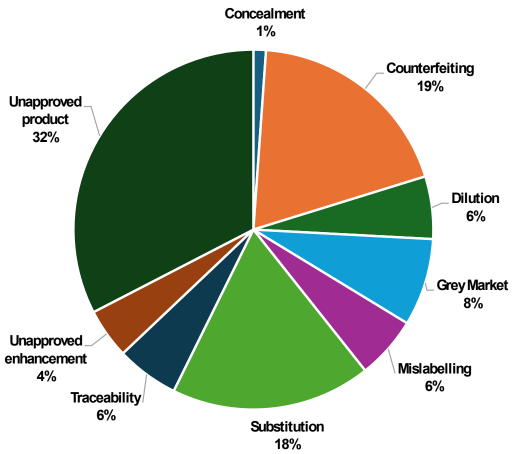


Category Reported Issues February 2026

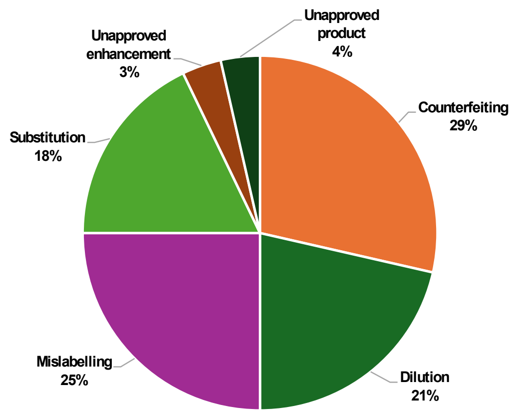


February 2026 has seen an increase in issues related to chemistry and supply with a large increase in reported authenticity issues.

Authenticity Issues February 2025



Authenticity Issues February 2026



The distribution of authenticity issues shows considerable differences between February 2025 and February 2026. Reports of unapproved product decreased from 32% in February 2025 to 4% in February 2026. The spike in unapproved products 2025 can be attributed to a Turkey-linked enforcement cluster.

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