




Food Forensics Risk Newsletter

April 2026



HIGHLIGHTS

-  Ongoing conflict in the Middle East puts severe pressure on energy and input costs, including fertilisers.
-  Severe storms in Souss-Massa, Morocco cause damage to greenhouse fruit and vegetable production.
-  Shipping and air freight disruption due to Middle East conflict causes delays, shortages and potential quality issues to produce.
-  Impact of delayed plantings in Spain due to January/February storms being felt with broccoli and cauliflower shortages.
-  The UK has begun targeted vaccine trials against highly pathogenic avian influenza (HPAI)
-  UK-India Free Trade Agreement is set to ease imports of Indian fresh produce into the UK.

Produce

Citrus

Mexican lime supply is tight due to extreme weather over the past four to six months, including cold fronts, heavy rains, flooding and bloom drop, which have reduced harvestable fruit. Quality is good, but most limes are smaller in size, with larger sizes limited. Demand is strong through early April, supporting elevated prices. Tight supply and higher prices are expected to persist until mid-April, with relief and price drops likely in May as new fruit matures.

California citrus growers are facing concerns over a recent heat wave, which has disrupted bloom in some navel orange blocks, potentially affecting fruit sizing and future drop. Surging fuel prices, linked to the Middle East conflict, are further driving up transportation costs. Uncertainty persists over the impact of heat on the winter citrus crop until harvest outcomes become clearer in June.

Brazil's 2025/26 orange juice crop has boosted global stocks, with December 2025 inventories rising 75.4% - the highest since 2021. The increase follows historically low levels in 2024 and reflects favourable production conditions, improved fruit quality and slower EU sales.

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

Top Fruit

The Middle East conflict is expected to further increase costs for UK apple and pear growers, adding to existing pressures from high labour costs and heavy compliance requirements. Disruptions around the Strait of Hormuz are driving sharp rises in fertiliser, fuel and energy prices at a critical point in the growing season when inputs must be purchased. Producers report that they cannot delay spending, meaning rising input costs will feed directly into production costs and potentially higher food prices unless support measures are introduced.

The 2025 UK pear season was strong, with volumes 25% higher than the previous year and high-quality fruit, particularly Class 1 Conference pears (95% of UK production), despite very hot summer temperatures boosting sweetness but reducing size. UK-grown Conference accounts for 60%+ of UK pear sales.

Risk considerations: price volatility.

Soft Fruit

UK berry growers are facing rising costs ahead of the summer season due to the Middle East conflict, which is disrupting global supply routes through the Strait of Hormuz. This has increased prices for fuel, fertiliser and energy used in machinery and glasshouse heating. Labour costs are set to rise further with the National Living Wage increase in April. The British Berry Growers Association warns that these pressures could strain production and

urges closer collaboration with retailers to ensure costs are fairly shared and UK berry supply remains resilient.

Severe storms in Morocco's Souss-Massa region in late February have hit the blueberry sector, cutting 2026 production by over 20% and causing individual losses of up to 50%. High winds and flooding damaged greenhouses and orchards, while adverse weather reduced fruit size. Smaller growers face uncertain recovery due to high repair costs and shortage of materials, exposing long-term investment risks in North African agriculture.

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

Stone Fruits

South African stonefruit (and grape) exports are facing delays due to disruptions at ports in the Middle East. Ships carrying produce have been unable to dock at several Gulf ports, forcing exporters to seek alternative routes, including re-routing via India, which adds time, costs and uncertainty to delivery schedules. Transport delays could impact product quality and market timing.

Risk considerations: quality deterioration.

Grapes

The UK grape market is expected to switch at around week 16 from a demand-driven phase with limited supply to a supply-driven market as new Northern Hemisphere volumes arrive. This overlap

could lead to oversupply, increased price volatility, particularly if quality is inconsistent or arrivals are concentrated.

Portugal has experienced extreme rainfall accompanied by strong winds, causing localised flooding, damage to vineyard structures and disruption to field operations. Excess water and saturated soils stress vine roots, raising risks of fungal disease and complicating preparations for the next season.

Risk considerations: oversupply, quality deterioration.

Bananas

A Fusarium Tropical Race 4 (TR4) outbreak has severely disrupted banana and plantain farming in Venezuela, prompting a phytosanitary emergency and forcing growers to abandon traditional Cavendish production in several key producing states. TR4 is a soil-borne fungal pathogen that can persist in the ground for decades and devastates susceptible banana crops, making infected land unusable for future plantings. The shift away from banana and plantain cultivation reflects the long-term risk posed by TR4, which can remain in soil for more than 20 years and threatens the viability of export-oriented banana farming in affected areas. Authorities and international partners continue efforts to contain the disease, promote biosecurity and help farmers sustain agricultural activity through crop diversification and enhanced management practices.

Risk considerations: price volatility, tightened global supply.

Dried fruit

The global raisin supply chain is increasingly fragile due to heavy reliance on a few key regions - Turkey, California and Iran - each facing significant pressures. Climate volatility has caused lower yields, disease issues and reduced quality in Turkey, China and South Africa, driving prices higher. Geopolitical tensions with Iran threaten supply, prompting buyers to seek alternative sources. South Africa's crop is affected by weather damage and cannot fully offset shortfalls. With limited geographic diversity and ongoing climate and political risks, tight raisin availability is expected to continue until the next harvest in August 2026, creating prolonged supply constraints and rising prices, affecting everyday products like cereals and hot cross buns.

Risk considerations: substitution, authenticity of origin.

Mango

Mango growers in Jagtial and former Warangal districts of Telangana, India, are facing a potential second consecutive crop loss due to erratic weather, unseasonal cold and pest outbreaks. Low night temperatures and cyclonic conditions disrupted flowering, while Thrips, leafhoppers and sooty mould damaged up to 90% of flowers in some areas.

West African mango exports to the EU are under increased scrutiny due to a high number of interceptions linked to fruit fly (Tephritidae) contamination, a quarantine pest in the EU. The European Commission has warned Senegal that failure to significantly reduce infestations could lead to a temporary ban on mango and other fruit exports, similar to the embargo imposed on Mali at the end of the 2025 season. More than 30 shipments were intercepted last season, raising concerns among EU authorities.

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

Salad crops

Higher energy, fuel and fertiliser costs are expected to push up prices for both imported and domestically grown produce, particularly glasshouse crops including cucumbers and tomatoes within the next six weeks. While retailers have not fully passed on these increases, food price inflation is expected to worsen as supply pressures and input costs filter through the system.

In the US, a combination of unusual weather in Mexico and Florida has caused severe shortages of bell peppers, cucumbers and tomatoes. Warm winter conditions in Mexico increased disease pressures, while Florida's freezes in late January and early February disrupted late-winter and early-spring production. The weak US dollar has also kept more Mexican produce in the domestic market, reducing exports. Supply relief is not expected until May, when Californian production begins.

The global cucumber market is facing a range of risks that could impact production, supply and prices. Weather is a major concern, especially in Spain, where high humidity and pest pressure have disrupted fruit development and led to lower, less consistent output. In South Africa, ongoing rain and limited sunshine have reduced summer production. At the same time, the start of domestic harvests

in Germany, the Netherlands, Belgium and Italy is boosting supply in the short term and pushing prices down. However, any delays or shortages in other regions could quickly tighten supply again and shift prices upward.

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

Broccoli & Cauliflower

Europe is facing a short-term shortage of broccoli and cauliflower, mainly due to reduced supply from Spain after heavy winter rains delayed planting. The tight supply is expected to last at least a month and is pushing prices higher, with limited production also reported in Italy and France. Growers warn that volumes will drop sharply for around three weeks, before a likely oversupply from mid-April due to earlier planting delays. The sector is also under pressure from rising input costs and increasing pest problems, worsened by limited access to effective pesticides, raising concerns for upcoming harvests and further supply constraints.

Risk considerations: supply volatility, quality issues, pest and fungal diseases.

Tomatoes

Spain's tomato exports have fallen sharply over the past 13 years, dropping by 43% from 2013 to 2025, with significant declines across key regions including Almería, Murcia and Granada. Despite the drop in volume, Spanish export values have been supported by a strong rise in prices, which have increased by over 80% during this period. Morocco remained the EU's largest non-EU tomato supplier at the end of 2025, accounting for 70.6% of imports.

Risk considerations: MRL compliance, authenticity of origin.

Onions

Spain's early onion harvest is set to begin with crops largely recovering from February's heavy rains. While flooding destroyed some fields in Andalusia, most production areas remain unaffected. However, persistent rainfall has delayed planting in key areas, especially La Mancha and the sector expects a production gap in June. Overall, Andalusia's harvested area is slightly down, while Murcia and Valencia remain stable.

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

Ginger & Garlic

Brazil expects a strong 2026 ginger harvest, but the global market remains uncertain due to competition from China, logistical challenges and geopolitical tensions. High freight costs and market volatility have pressured margins, with exporters at times selling at or below cost. While supply prospects are positive, pricing and market stability will depend on logistics, Chinese competition and global trade conditions.

Peru's ginger production is expected to rise by around 20% compared to last year, reflecting a broader global trend as Brazil and China also report increased output. The US remains the main market, taking 80% of Peruvian exports, the remainder going to Europe. Higher global supply, particularly from China, is putting downward pressure on prices. Logistical challenges, including rising freight rates to Europe and strict controls for *Ralstonia* bacterium, may influence export flows.

China's garlic export market is facing increasing volatility, with 2025 harvest export volumes expected to be similar to 2024 but currently lower due to expectations of falling prices. The new harvest is set to begin in late May 2026, and although planting areas have expanded, weather variability has created uncertainty over yields and quality. Meanwhile, conflict in the Middle East has interrupted garlic trade in the region and may raise shipping costs due to disrupted routes, adding further instability to export prices and global trade conditions.

Risk considerations: origin fraud due to market oversupply.

Coconut

Coconut prices in Thailand have plunged from 20 baht to as low as 2 baht. Producers blame a few Chinese-linked companies controlling harvesting, purchasing and exports, often buying at 2 to 5 baht and selling abroad for 35 to 50 baht, reducing farmers' bargaining power. Oversupply and slow export growth have worsened the situation, while traditional intermediaries have been displaced, raising risks of fraudulent practices. Climate challenges and fertiliser shortages linked to the Iranian conflict add pressure. The government has introduced support measures, including buying coconuts at 5 baht, aiming to stabilise prices by mid-2026.

Risk considerations: price and supply volatility, ethical considerations.

Herbs & spices

The European fresh herbs market is facing severe disruptions due to a combination of geopolitical conflict, adverse weather and transport bottlenecks. Conflict in the Middle East has caused widespread flight cancellations, cutting cargo capacity from Kenya and Israel to Europe by nearly 50%. Heavy rains in Kenya have damaged basil crops, with losses estimated at over 30%, while supplies from Israel are also very limited. As a result, basil availability in Europe has been low this month, even compared with the 2011 Iceland volcanic eruption. Energy price volatility and potential impacts from the Strait of Hormuz are further driving transport costs and uncertainty. Some relief may arrive toward the end of March as domestic Dutch production of greenhouse herbs ramps up, but the overall market remains highly volatile.

Risk considerations: quality deterioration, supply volatility.

Nuts

Cashew supply in Gia Lai province, Vietnam, is significantly reduced this season due to unseasonal rains during flowering and fruiting, which caused widespread blossom and young fruit loss. Key growing areas are reporting sparse orchards and lower yields.

The Middle East conflict is disrupting California's specialty crop exports, particularly pistachios, walnuts and almonds. Key markets in the UAE and Saudi Arabia are currently inaccessible, and shipments already at sea face uncertainty over delivery. Exporters are exploring alternative routes, but costs are rising due to higher fuel prices and shipping risks. The situation has created significant uncertainty and caution among California growers and exporters. About 20% of the 2025/26 California walnut crop remains uncommitted, raising concerns over carry-over, pricing and competition from Chile's upcoming season. If imports remain blocked, local Middle Eastern markets could see supply shortages and price increases.

Global pistachio supply is dominated by the US, Iran and Turkey. Last year, the US and Iran were in 'on-years' while Turkey was in an 'off-year'. Iran's exports were already constrained by internal unrest, drought and sanctions, and the recent Middle East conflict is further disrupting logistics. Turkey is experiencing a smaller 2025 crop and some shipping delays, tightening supply. The US is expected

to be the main source for global buyers, but the crop is in an off-year and sellers are exercising caution. Overall, near-term pistachio supply is constrained, supporting steady-to-firm pricing and intensifying competition for available stock.

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

Cereals

In the UK, grain prices have risen, with UK feed wheat futures reaching their highest level since November, driven by the ongoing Middle East conflict, strong oil prices and speculative trading. However, gains are limited by ample global supplies, with wheat stocks near a five-year high and solid maize and EU crop forecasts. Rapeseed and soybean prices have also remained firm. Fertiliser availability is under pressure, adding to the risk premium. Drought in key US wheat regions threatens crop development, while dry conditions could further delay corn planting. In Europe, production forecasts are mixed and adverse weather in the Black Sea region adds further uncertainty, leaving markets sensitive to any disruption or sudden shifts in planting and yield conditions.

Desert locust swarms in Morocco have advanced northward, reaching the Souss-Massa region and threatening key wheat and barley plantations. Farmers report spraying efforts have been delayed or insufficient and control measures have slowed. Southerly winds and irregular rainfall are accelerating locust reproduction and movement. Some swarms have appeared in north-western Algeria and near the Canary Islands, raising the risk of further regional spread.

Risk considerations: origin misdeclaration, sanctions compliance (Russia).

Coffee

Vietnam, the world's leading Robusta producer, is facing major supply pressures as extreme weather and rising land costs cut yields and push some farmers out of coffee production. Although prices have temporarily eased, experts warn that reduced output from Vietnam is likely to drive global coffee prices higher over the next year. Smaller roasters will feel the impact first, with consumer price rises expected to follow. Port congestion and high container rates are affecting export timelines, especially from Vietnam and Brazil.

Risk considerations: price fluctuation, blend reformulation.

Cocoa

Cocoa prices have rebounded sharply from a three-year low of \$2,886/tonne in February to around \$3,349/tonne, following a market overreaction to expected surpluses in the 2025/26 season. The rebound reflects technical corrections rather than strong demand, which remains weak due to manufacturers reducing cocoa usage and broader inflation dampening consumer spending. Supply-side factors, including slowed deliveries from Ghana and Ivory Coast, have tightened availability temporarily, supporting higher prices.

Despite the rebound, prices could fall again, as favourable West African weather and discounted forward sales from Ivory Coast signal potential surpluses. The market remains highly volatile, complicating procurement and planning for manufacturers, who are adjusting formulations and product portfolios to manage costs. Shipping disruptions from the Middle East conflict are boosting transport costs, supporting prices.

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

Potatoes

The European potato market is currently experiencing a significant surplus of around 3.3 million tonnes, forcing some farmers to pay for disposal. Over the past two years, growers in the Netherlands, Belgium, Germany and France expanded cultivation based on strong demand and favourable contracts, but declining export opportunities due to increased Asian competition, US tariffs and a weaker dollar, have created structural oversupply.

Rising fertiliser prices and supply shortages are hitting at a critical time for next season's potato planting, while higher fuel and energy costs are increasing expenses for field operations, irrigation, transport and storage. Potatoes are especially vulnerable due to their reliance on precise nutrient management and long-term storage, meaning input shocks can affect yields, quality and costs across the entire value chain.

Risk considerations: current oversupply followed by possible shortage, quality/storage issues.

Honey and Syrups

Beekeepers in South West England are reporting severe winter losses, with some losing up to 90% of their hives, far above

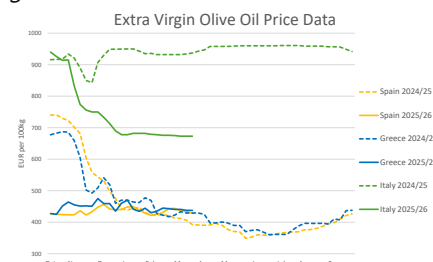
the generally accepted 15% loss rate. The unusually wet and mild winter, with prolonged rain preventing bees from foraging and performing cleansing flights, is believed to be a major factor, though illness and nearby farming practices may also contribute. Nationwide, average losses last winter were just under 25%, with the South West and south-east regions particularly affected, and further data for 2025/26 are expected to confirm even higher losses.

Risk considerations: supply shortage, authenticity, substitution risk.

Olives & Olive oils

Inspection results in Croatia showed that nearly one-third of tested extra virgin olive oil samples failed to meet EU quality standards in 2025, raising concerns about product authenticity and labelling. Experts warn that fraudulent oils may contain low-quality substitutes or even harmful substances like mineral oils, highlighting ongoing risks to consumers and the need for continued surveillance. The difference in price between olive oils of different national origins makes substitution a risk. Italian EVOO maintains its premium over both Spanish and Greek. At €1,316 per 100kg, Croatian EVOO is currently nearly twice the price of Italian EVOO.

Risk considerations: origin mislabelling, undeclared blending, dilution with lower grade oils.



Protein

African Swine Fever (ASF)

African swine fever (ASF) has been detected in Barcelona for the first time, with total confirmed cases in the Catalonia region surpassing 200. Authorities have recorded 227 positive cases in wild boar, with ongoing outbreaks largely concentrated in restricted zones. The new case in Barcelona has led to stricter containment efforts, including reinforced restrictions in the Collserola Natural Park. Officials are focusing on limiting wild boar movement and preventing further spread, though controlling access to the entire park remains challenging.

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

Avian Influenza (HPAI H5N1)

England has lifted several local avian influenza restriction zones in Northumberland, Norfolk and Suffolk after successful containment. However, new cases continue. Nationwide restrictions remain in place under the Avian Influenza Prevention Zone, with mandatory housing and strict biosecurity rules still required. The UK has recorded 96 cases in total this season, including 75 in England. Risk from wild birds remains high, and authorities stress continued vigilance and strong biosecurity to prevent further spread. The UK has begun targeted vaccine trials against highly pathogenic avian influenza (HPAI), focusing on turkeys, a species highly susceptible to severe outbreaks.

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

Blue-tongue virus (BTV-3)

There have been 327 cases of bluetongue in Great Britain in the 2025 to 2026 bluetongue season (since 1 July 2025). Cases continued to be reported in March with clusters in Devon, Cornwall and Cumbria.

Lumpy Skin Disease

Bovine lumpy skin disease, which affected several regions of France, appears to be moving toward containment with the enforcement of movement restrictions and widespread vaccination measures.

Sheep & Goat Pox

Greek feta production is under significant threat due to widespread livestock losses caused by a pox outbreak, with over 480,000 sheep and goats culled since August 2024. This has sharply reduced milk availability—by around 40% in key regions like Thessaly—leading to falling feta output and disrupted supply. Producers are experiencing up to 50% drops in milk deliveries, while rising milk prices are increasing costs and putting export competitiveness at risk. With production expected to fall by around 20,000 tonnes in 2026, continued animal losses and movement restrictions pose ongoing risks to both supply and the feta industry's export position.

Risk considerations: regional lamb and goat supply constraints.

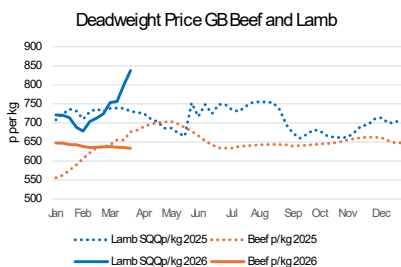
Dairy

Dairy markets are showing tentative signs of recovery after months of oversupply and falling prices, with modest gains in New Zealand Global Dairy Trade auctions and UK wholesale prices for skimmed milk powder and Cheddar. Rising energy, feed and input costs linked to the conflict in Iran add further risk, likely keeping farm margins tight. While early indicators suggest prices may stabilise or rise slightly over the next few months, the recovery is fragile and vulnerable to geopolitical and supply shocks.

Lamb & Goat

Lamb prices strengthened significantly in March. Deadweight old season lamb reached 838p/kg, up sharply week-on-week and year-on-year, supported by strong seasonal demand, while live prices also rose. Despite slightly lower slaughter numbers, retail data shows continued consumer demand for lamb, with higher prices accompanied by increased volumes and spending. The large price differential between lamb and beef makes species substitution a risk.

Risk considerations: species substitution.



Beef

GB cattle prices in March have remained largely flat to slightly lower than last month. AHDB reports that GB cow prices are rising, supported by reduced availability across the UK and Ireland. Slaughter volumes were broadly stable, with a small drop in both prime cattle and cull cow throughput.

Risk considerations: species substitution.

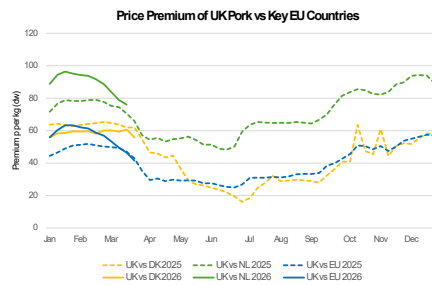
Pig Meat

GB pig prices continue to decline, with the EU-spec SPP falling to around 185p/kg and now well below both last year and the three-year average. Production remains stable, with slightly lower slaughter numbers but heavier carcase weights.

In contrast, EU pig prices have recently edged up, narrowing the gap with UK prices, though they remain significantly lower year on year. Weak consumer

demand is also weighing on the market, with retail pig meat volumes down, despite pork remaining cheaper than other proteins. Overall, the market is under pressure from falling prices and soft demand.

Risk considerations: origin substitution.



Chicken & Turkey

EU poultry production rose sharply in February, approaching 1 million tonnes and reaching some of the highest levels in recent years. Broiler prices increased 1.3% to about 293.75 eurocents/kg, remaining significantly higher than prices in the US and Brazil. Meanwhile, EU poultry exports for January to November 2025 fell slightly by 1.3% to 1.9 million tonnes.

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

Egg Layer

The British Egg Industry Council (BEIC) warns that a UK ban on all caged egg production—including enriched colony, pullet rearing and breeder cages—could threaten the domestic egg sector. They argue such a ban would increase imports of cheaper eggs and egg products from lower-welfare systems abroad, undermining local producers and distorting prices. BEIC is urging the government to apply the same standards to imports. EU laying hen numbers surged to over 15 million birds in December, with France, Germany and Spain remaining the leading egg producers.

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

Cod

Falling Atlantic cod supply and rising prices are pushing the seafood industry to promote alternative whitefish such as pollock, haddock and hake, which are generally more available. Tight supply and higher prices also increase the risk of fraudulent substitution or mislabelling, as lower-value species may be sold as cod to capture higher margins.

Risk considerations: origin substitution, price volatility.

Pollock

The Alaska pollock fishery has been recertified by the Marine Stewardship Council, confirming it meets core sustainability standards, but with a new condition requiring stronger action to reduce wild salmon bycatch. The fishery must demonstrate measurable progress in limiting incidental catches through improved monitoring and mitigation or risk losing certification in future assessments. The decision reflects increasing scrutiny of wider ecosystem impacts, not just target stock health.

Risk considerations: origin traceability.

Mackerel

More UK supermarkets are considering stopping purchases of Atlantic mackerel from the Northeast Atlantic after Waitrose announced it would drop the species. The move follows the loss of sustainability certification from the Marine Stewardship Council due to ongoing quota disputes between fishing nations including the UK, Norway, Iceland and the European Union. The reduced 2026 Atlantic mackerel quota is set to cut global pelagic fish supply by around 4%, largely due to a 70 - 77% reduction in Northeast Atlantic mackerel catches. Retailers are increasingly distancing themselves from the fish amid sustainability concerns, raising pressure on governments to agree new catch limits.

Risk considerations: substitution with alternative species, labelling accuracy.

Anchovy

Peru's fishing industry is urging the government to open the anchovy fishing season early due to forecasts of a coastal El Niño that could warm ocean waters and reduce catches.

Risk considerations: supply-demand imbalance, species substitution.

Fishmeal and fish oil

Chinese fishmeal prices have jumped sharply after stocks at major Chinese ports fell to their lowest in two years, while landings from Peru, the world's biggest source of fishmeal, remain near zero and fears grow around a Coastal El Niño reducing future output. These supply strains are pushing the market toward historic highs, with limited stock on hand and tight global availability putting upward pressure on prices as buyers compete for scarce fishmeal supplies.

Risk considerations: sustainability, environmental impact.

Animal Food

Pet-food RASFF Alerts & Recalls

The US FDA has warned that eight lots of Quest Cat Food from Go Raw LLC (Steve's Real Food) contain critically low or absent thiamine (vitamin B1). The products are labelled as nutritionally complete for all life stages, but cats fed these lots exclusively have shown deficiency symptoms.

Pretty Bird International, has voluntarily recalled Young Again Pet Food Core Health Dog Food due to a presumptive positive test for Salmonella.

RCL Foods is recalling certain dry pet food products in South Africa after batches previously condemned for Salmonella contamination were stolen from a waste facility and entered the market. Affected brands include Bobtail, Bonzo, Catmor, Canine Cuisine, Feline Cuisine, Optimizor, and Ultra Pet Dog food.

Risk considerations: food safety.

General

Environmental

The US is reviewing potential subsidies in Ecuador's shrimp sector, with additional scrutiny on alleged mangrove damage and forced labour in the supply chain.

Thrips

Thrips parvispinus, an invasive insect native to Southeast Asia and Australia, has been detected for the first time in Italy, specifically in Sicily, a key hub for greenhouse horticulture. The pest threatens major crops including peppers, cucumbers, aubergines and tomatoes, as well as ornamental plants like gerberas and gardenias. Its feeding damages young leaves and flowers, causing yellowing, deformation and roughened fruits, with losses on peppers reaching up to 40% in countries like India and Indonesia. The insect develops rapidly, completing its life cycle in just 14 days under Mediterranean greenhouse conditions, allowing multiple overlapping generations which makes eradication extremely challenging.

El Niño

Globally, a strong El Niño is predicted to develop this summer and persist through 2026, with a 62% probability according to NOAA forecasts. Agriculture faces risks, with warmer conditions potentially reducing yields for fruit crops that need cooler periods—limes, mangoes, grapes and bananas are particularly vulnerable. Many producers have adapted to past events, which should help mitigate impacts in resilient sectors like blueberries.

Overall, the main risks are hotter global temperatures, more extreme storms, heavier downpours, intensified droughts and stronger wildfires, with human-caused climate change amplifying these effects.

Severe weather

Flash flooding in Australia's Sunraysia and Murray Valley regions has disrupted the harvest of almonds, melons, table grapes, dried fruit and wine grapes, causing delays, crop losses and quality issues. There are concerns over mould in wine grapes and elevated moisture affecting almond processing.

Worker's rights

A lawsuit has been filed against AquaStar (USA) Corporation, a Seattle-based frozen seafood company, alleging that it misrepresented the sourcing of its shrimp products and failed to ensure responsible supply chain practices. The complaint claims AquaStar sold shrimp potentially linked to radioactive contamination, citing previous recalls involving imported shrimp contaminated with the radioactive isotope caesium-137 (Cs-137), and that the company relied on suppliers with questionable labour practices. The case underscores broader concerns regarding food safety and supply chain transparency, alleging that AquaStar did not sufficiently disclose risks or exercise adequate oversight over its sourcing.

UK - India trade agreement

The [UK-India Comprehensive Economic and Trade Agreement \(CETA\)](#), signed in 2025 and under ratification, is set to ease imports of Indian fresh produce into the UK. The agreement is said to be the UK's biggest and most economically significant new bilateral free trade agreement since leaving the EU. Tariffs on nearly 99% of Indian exports, including fruits, vegetables and marine products, will be removed (or progressively removed), cutting landing costs, speeding customs clearance and shortening transit times. Food safety standards and regulatory compliance remain a key concern. Faster imports and increased volumes will require careful monitoring, by what is already a pressurised system, to ensure produce meets UK hygiene, pesticide residue and sanitary standards.

Risk considerations: increased scrutiny and testing on Indian produce.

Fertiliser supplies

The disruption of the Strait of Hormuz is raising serious concerns for global fertiliser markets. The waterway is critical for exporting key inputs (urea, ammonia,

sulphur, phosphates and natural gas) used in fertiliser production. Shipping delays and insurance cancellations are reducing vessel availability, threatening global supply and pushing prices higher. Nearly half of the world's urea and sulphur exports, as well as major phosphate shipments from Saudi Arabia, transit this route. Costs for farmers globally are expected to rise and could lead to reduced application rates or shifts in cropping decisions, ultimately impacting yields in upcoming seasons.

Biofertiliser

The UK trade body ADBA is urging the government to relax restrictions on domestic biofertiliser, or digestate, to help farmers reduce dependence on imported synthetic fertilisers amid rising global energy and fertiliser costs. With over 750 biogas plants across the UK, the supply of biofertiliser is substantial but currently under-utilised. While offering a sustainable alternative, digestate adoption requires careful management and adherence to best practice standards.

Middle East conflict

The ongoing Middle East conflict is pushing up energy and input costs for farmers worldwide, with higher gas and oil prices raising fertiliser, fuel, heating, transport and agrochemical expenses. Arable and livestock sectors are one of the most exposed, with rising feed costs threatening dairy and pig production, while energy shocks may sustain inflation and constrain investment. This uncertainty is affecting planting and harvesting decisions, raising concerns over future supply continuity and potential shortages.

Shipping disruptions are also affecting fresh produce. Middle Eastern carriers account for much of global cargo capacity, so strikes, port closures and route changes are forcing trade shifts, including more direct China–Europe flights. Airfreight for short-shelf-life products is limited and costly, while around 90% of South African fruit exports to Gulf markets are delayed or rerouted to Europe and the UK, raising costs and risks of losses. These pressures threaten supply, push up prices and could reduce production in the coming months.

Rising fuel prices, driven by Middle East tensions and broader energy market instability, have shut down significant portions of the EU fishing fleet, undermining profitability, threatening supply and prompting calls for government support to sustain operations and protect seafood availability.

IN THE NEWS: March

Seafood

'Target' is being sued in a class-action case alleging its 'Good & Gather' tuna is misleadingly labelled as "sustainably caught," with claims and MSC certification potentially overstating environmental standards. The case highlights broader concerns about transparency and accuracy in seafood sustainability claims and could increase scrutiny on retailers' sourcing and labelling practices.

Meat

Carmello Gale, 71, from Llandysul, Ceredigion, has admitted to multiple offences in the illegal 'smokies' trade, including conspiring to place unsafe meat on the UK market. Smokies are sheep or goat carcasses singed in unlicensed premises, bypassing hygiene controls, which can lead to contamination. Gale's involvement included wide-scale distribution across the UK. Sentencing is pending, and the case highlights the National Food Crime Unit's ongoing crackdown on unsafe and illegal meat practices.

The UK Food Standards Agency (FSA) has secured £70,967 in confiscation orders from Anthony Fear and his company, Fears Animal Products Ltd, following a major illegal meat fraud case. The investigation by the FSA's National Food Crime Unit (NFCU) and Southwark Council uncovered 1.9 tonnes of unsafe animal by-products, including chicken, lamb testicles and beef burgers, being processed for human consumption.

Animal welfare

A Mexican senator has introduced a bill that would ban all octopus and other cephalopod farming nationwide, with support from animal welfare NGOs. The proposal follows similar legislative efforts in Chile and the United States, where some states have already enacted bans.

Spices

Investigations in Nigerian markets have revealed that some vendors are adulterating ground pepper and

tomatoes with toxic dyes and low-quality ingredients to boost colour and appearance, creating significant food safety risks. Reports indicate that discarded pepper seeds, residues, and unripe tomatoes are being mixed with red dyes—often non-food-grade chemicals intended for textiles or plastics—to achieve a bright red look that appeals to consumers.

Thai fruit and vegetables

The EU is auditing Thailand's pesticide residue control system for fruit and vegetable exports to verify compliance with strict European food safety standards. The assessment covers the full supply chain, including farm practices, packing, inspections and laboratory testing, alongside efforts to improve farmer training and traceability. The outcome will be key to maintaining market access and building confidence in Thai exports to the EU.

Dairy

In Andhra Pradesh (India), 16 people have died after consuming milk adulterated with ethylene glycol, which caused acute renal failure.

Wine

The UK's Food Standards Agency (FSA) National Food Crime Unit seized over 67,000 bottles of suspected counterfeit wine and prosecco, valued at around £500,000, from warehouses in north London and Essex on 3 March 2026. A 61-year-old man was arrested on suspicion of conspiracy to defraud and later released under investigation. The operation, conducted with the Metropolitan Police, local councils, trading standards officers and the FSA's Wine Inspection Team, highlighted the scale and complexity of alcohol fraud. While no immediate health risk was identified, the case underscores risks to consumers and legitimate businesses from mislabelled or fraudulent products, threatening trust,

provenance, and commercial integrity in the UK alcohol market.

TraceMap

The European Commission has launched TraceMap, a new AI platform designed to strengthen food safety across the EU by detecting food fraud, tracing contamination, and speeding up product recalls. Accessible to national authorities in all member states, TraceMap uses existing agri-food data to track trade and production flows in near real-time, facilitating risk assessments, linking operators and distribution networks and enabling rapid recalls of unsafe products. The tool has already been piloted in the recent European baby formula recalls linked to contaminated imports from China. Its introduction comes amid rising food safety concerns, including a 14.5% increase in reported foodborne outbreaks in 2024, with diseases like campylobacteriosis, salmonellosis, *E. coli* infections and listeriosis. TraceMap aims to enhance cross-border coordination, protect consumers and farmers, and boost confidence in EU food safety systems.

Fertiliser fraud

Authorities in Kenya dismantled a fertiliser repackaging syndicate, arresting eight people. The group exploited registered farmers by redeeming government-issued subsidy vouchers on their behalf in exchange for small incentives, then diverted and adulterated the fertiliser using chemical pigments to mimic high-value products before repackaging and selling it at market rates. The raid recovered large quantities of fertiliser, empty branded bags, pigment packets, sewing machines and vehicles used in the operation. Investigators also suspect collusion with individuals at some National Cereals and Produce Board depots. Authorities warned that the scheme undermines subsidy programmes, exposes farmers to financial losses, and could harm agricultural productivity. The rising cost of fertiliser makes adulteration an increasing risk.

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

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

Food Safety March

Country No of Alerts

France	132
Canada	39
Poland	26
United States	26
Spain	25
China	25
Germany	24
Netherlands	17
India	17
Belgium	16
Czechia	14
Turkey	13
United Kingdom	11
Egypt	10
Italy	9
Romania	8
Australia	8
Norway	7
Vietnam	7
Mexico	7
Sweden	7
New Zealand	6
Argentina	6
Ukraine	6
Peru	6
Finland	6
Israel	6
Switzerland	5
Brazil	4
Hungary	4
Lithuania	4
Singapore	3
Thailand	3
Syria	3
Luxembourg	3
Pakistan	3
United Arab Emirates	3
Japan	2
Latvia	2
Azerbaijan	2
Austria	2
Tanzania	2
Sri Lanka	2
Myanmar	2
South Korea	2
Indonesia	2
Ireland	2
Iran	2
Ghana	2
Ecuador	2
Denmark	2
Lebanon	2
Uzbekistan	2
Greece	2
Uruguay	2
Togo	2
Afghanistan	1
Rwanda	1
Saudi Arabia	1
Bangladesh	1
Croatia	1
Hong Kong	1
Estonia	1
Serbia	1
Morocco	1
Bulgaria	1
Jersey	1
Cyprus	1
Nigeria	1
Philippines	1
Moldova	1
Venezuela	1
Bosnia and Herzegovina	1
Slovakia	1
Burkina Faso	1
Chile	1
Colombia	1
Iceland	1
Costa Rica	1
Bolivia	1
Russian	1
Jordan	1
North Macedonia	1
Nicaragua	1

Total 585

SUMMARY

- There were **559 Red**, **26 Amber** and **0 Green** totalling **585 safety alerts and product recalls*** in March.
- The majority of alerts were for bacterial pathogens and pesticides (29.7% and 14.2% respectively). Allergens were third with 12.5%.
- 174 Bacterial pathogen alerts (43% Salmonella, 40% Listeria); *E.coli* related posts at 14% of which 71% were STEC.
- 83 Pesticide alerts (23% Chlorpyrifos, 5% Anthraquinone/Acetamiprid/Lambda-Cyhalothrin).

Top 3 alerts by commodity

- Protein:** Chicken; Sausage; Pork.
- Produce:** Vegetables; Fruit; Dried fruit.
- Ingredients:** Nuts & seeds; Herbs & spices; Rice, pasta & noodles.

Top 3 number of alerts by county of origin

- France:** Cheese; Pork; Sausage.
- Canada:** Ready meals; Sweets & desserts; Cheese.
- Poland:** Chicken; Turkey; Vegetables.

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

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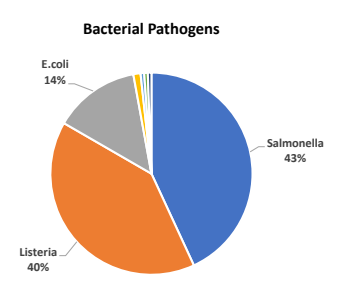
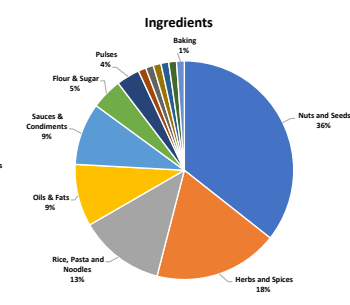
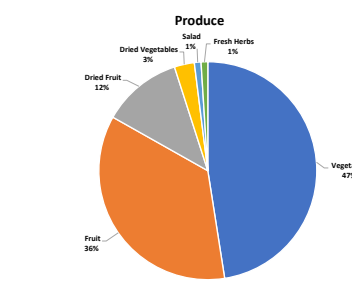
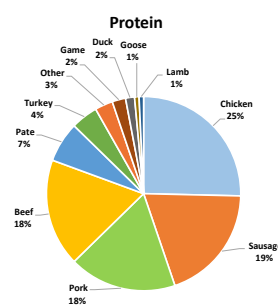
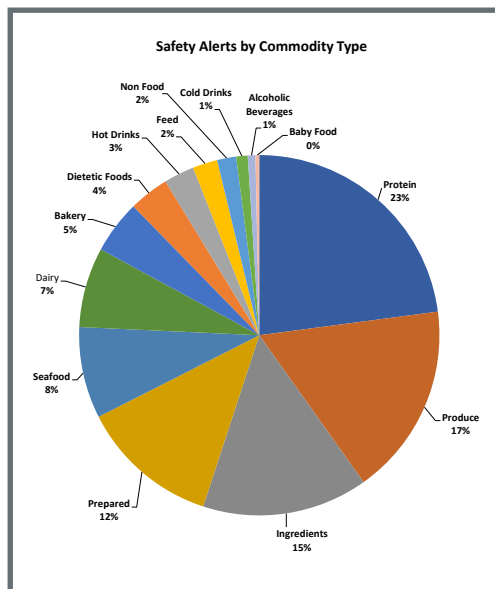
Contact us

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

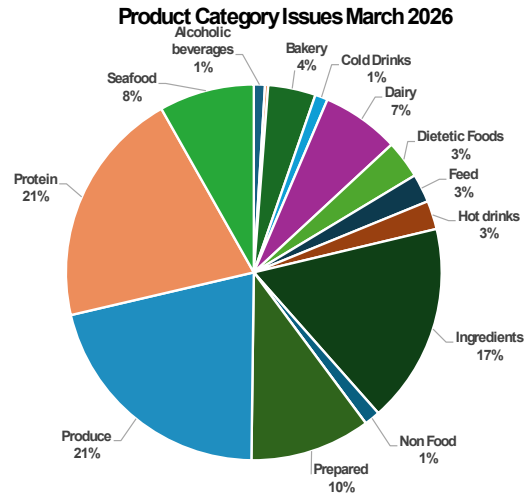
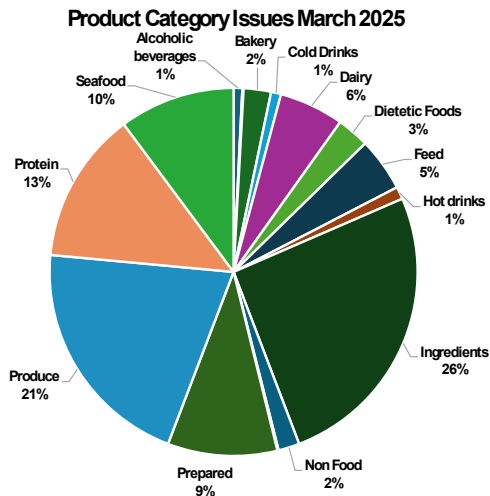
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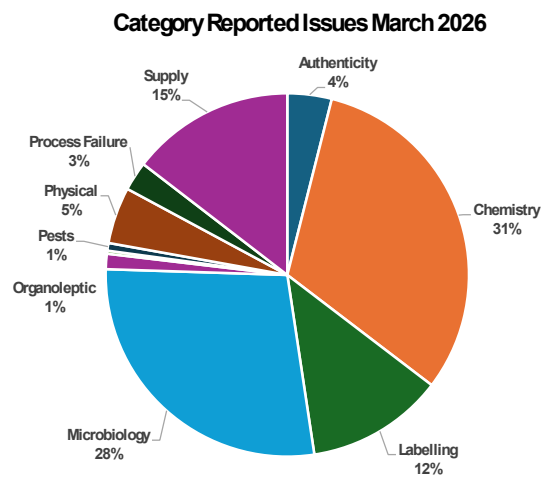
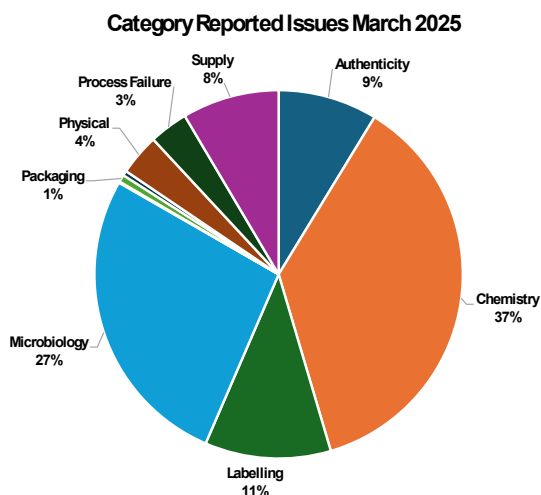
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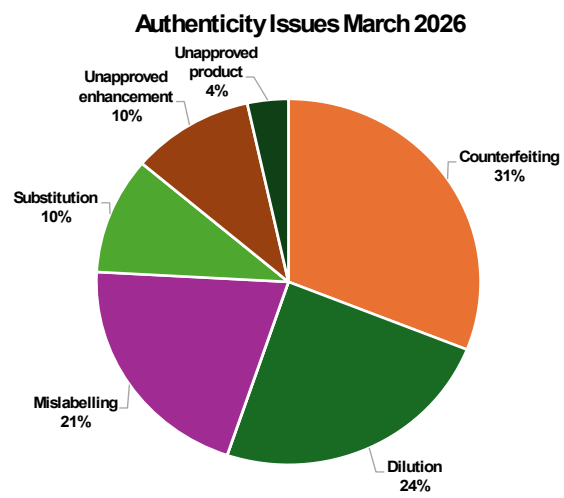
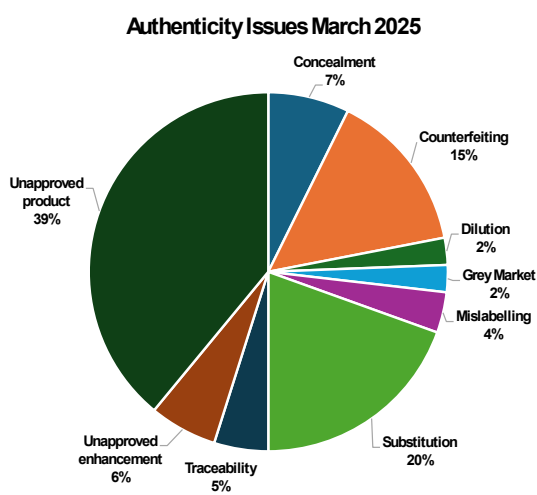
Knowledge Base Trends



March 2026 has resulted in a similar product category profile to March 2025 with an increase in the proportion of issues reported in protein but decrease in ingredients.



March 2026 has seen a large increase in reported supply issues, as would be expected given the current conflict in the Middle East.



The distribution of authenticity issues shows considerable differences between March 2025 and March 2026. Reports of unapproved product decreased from 39% in March 2025 to 4% in March 2026. Counterfeiting has seen an increase from 15% in March 2025 to 31% in March 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

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