



Department
for Environment
Food & Rural Affairs

Note of the meeting of the UK Agricultural Market Monitoring Group, 8 April 2025

The UK Agricultural Market Monitoring Group comprises representatives from Defra, DAERA, Scottish Government and Welsh Government.



Scottish Government
Riaghaltas na h-Alba
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Department of
**Agriculture, Environment
and Rural Affairs**



Llywodraeth Cymru
Welsh Government

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Introduction

This note records the key points discussed at the meeting of the UK Agricultural Market Monitoring Group (UKAMMG) held on 8 April 2025. Present were representatives of Defra, Scottish Government, Welsh Government and DAERA (Northern Ireland). The meeting assessed issues impacting on the UK agricultural sector and reviewed the market situation across a range of agricultural commodities.

The publication of these notes is in the interest of preserving transparency and accountability. The accompanying data reports will be published on the same GOV.UK landing page.

Key points: Market situation

- Farming sectors are performing well, with prices well above the 5-year average in the beef and sheep sectors as well as in the pig sector despite a gradual decline in prices for pigmeat over the past year.
- The market dynamics were influenced by currency fluctuations, fuel prices, and varying demand across different agricultural products. Global trade policies contributed to market uncertainty alongside decreases in crude oil prices and increases in gas prices.
- Met Office predictions for April 2025 to June 2025 indicate near average temperatures, rainfall and windspeed for this period, with the possibility of heatwaves in the summer months.

Intervention scheme announcements

No new market intervention schemes have been announced.

Market inputs overview

In March 2025 the Brent crude oil price (UK) was down month-on-month (MoM) by 7.2% and down year-on-year (YoY) by 17%. Red diesel prices were down 1.6% MoM in March 2025, and down 8.5% YoY. European Natural Gas prices were down 16.7% MoM and up 55% YoY.

Despite global uncertainties around potential changes to trade and tariff policies, Pound Sterling remained stable throughout March 2025 and gained against the US dollar largely due to renewed concerns of a recession in the USA.

UK demand for fertiliser continues to rise across all Nitrogen fertilisers and Nitrogen Phosphorous Potassium (NPK) blends, partly due to the early Spring this year. No industry concerns have been raised on price or supply of fertiliser.

Sector discussions

Pigs

The monthly Standard Pig Price (SPP) (203.3p/kg, February 2025) has continued in a gradual decline. Although prices paid are lower than they were last year, they remain historically high above the 5-year average.

In February 2025, UK weekly pig-meat production was 19,800 tonnes, up 3% MoM, up 3.9% YoY and up 0.2% on the 5-year average.

In February 2025, UK weekly average clean pig slaughter was 208,200 head, up 2.6% MoM, up 6.2% YoY and down 0.1% on the 5-year average.

Eggs

The average egg price in Q4 2024 was 146.9p/dozen, up 6.3% YoY and up 0.8% on Q3 2024.

The total egg production for human consumption in Q4 2024 was 253.6 million dozen, up 4.2% YoY and down 0.2% on Q3 2024.

The weekly average for commercial layer eggs set in February 2025 was 1.85 million, down 15% MoM, down 17% YoY and down 8.5% on the 5-year average.

The weekly average for commercial layer chicks placed in February 2025 was 0.74 million, up 4.2% MoM, down 5.6% YoY and down 1.7% on the 5-year average.

Both the weekly average layer eggs set and chicks placed in February 2025 are following historical seasonal trends.

Poultry

Commercial broiler slaughter in February 2025 was 22.4 million birds, up 1.4% MoM, up 1.5% YoY and up 4.1% on the 5-year average.

Turkey slaughter numbers in February 2025 was 0.10 million birds, down 4.2% MoM, down 25% YoY and down 40% on the 5-year average.

UK weekly average poultry meat production in February 2025 was 38.8 thousand tonnes, down 2.5% MoM, down 0.5% YoY, and up 2.9% on the 5-year average.

Dairy

UK February 2025 farmgate milk price (FGMP) was 46.1ppl, up 0.2% MoM, up 19% YoY and up 27% on the 5-year average.

UK milk supply for February 2025 remained firm at 1187 million litres, down 7.6% MoM, up 3.4% YoY, and up 2.3% on the 5-year average. as the milk to feed price ratio continued to be positive, incentivising production.

The March 2025 Actual Milk Price Equivalent (AMPE) price was 42.7ppl, up 1.6% MoM, and down 17% YoY.

The March 2025 Milk for Cheese Value Equivalent (MCVE) price was 44.1ppl, up 1.9% MoM, and up 21% YoY.

The March 2025 Bulk Cream price was 2624£/tonne, down 0.1% MoM, up 28% YoY, up 50% on the 5-year average.

Beef

In February 2025, the monthly prime cattle prices (deadweight) was 631.8p/kg, up 9.4% MoM, up 28% YoY and up 52% on the 5-year average. This may be driven by strong demand, processor competition, and firm retail performance.

In February 2025, cow deadweight prices also remained high due to seasonal catering demand, up 15% MoM, up 37% YoY and up 57% on the 5-year average.

Average weekly prime cattle slaughter in February 2025 was 41.3 thousand head, up 5.0% MoM, down 1.4% YoY and up 1.8% on the 5-year average.

Average weekly beef and veal production in February 2025 was 18.4 thousand tonnes, up 3.9% MoM, down 5.3% YoY and down 1.3% on the 5-year average.

Sheep

In February 2025, the monthly Standard Quality Quotation (SQQ) Clean Lambs GB price was 733.6p/kg, up 1.6% MoM, up 5.9% YoY and up 27% on the 5-year average, as demand remains robust.

Average weekly clean sheep slaughter, in February 2025, was 219 thousand head, up 5.5% MoM, down 0.2% YoY, and up 2.9% on the 5-year average.

Average weekly mutton and lamb production, in February 2025, was 5.15 thousand tonnes, up 5.6% MoM, down 5.0% YoY, and down 1.5% on the 5-year average.

Arable

In March 2025, Bread Milling Wheat (16/03/25) was 191.1£/tonne, up 0.2% week-on-week (WoW), down 9.5% MoM, and down 17% YoY.

In March 2025, Feed Wheat (16/03/25) was 176.2£/tonne, up 1.0% WoW, down 4.9% MoM, and up 3.4% YoY.

In March 2025, Feed Barley (16/03/25) was 153.9£/tonne, down 2.0% WoW, down 3.4% MoM, and up 8.2% YoY.

Horticulture

The group focussed on key domestic seasonal commodity prices for March 2025.

Apple prices were 1.29£/kg, up 0.2% MoM and down 2.9% YoY. Onion prices were 0.58£/kg, down 4.3% MoM and down 28% YoY. Carrot prices were 0.45£/kg, down 2.3% MoM and down 32% YoY. Cauliflower prices were 0.80£/kg, down 20% MoM and up 1.8% YoY. Cabbage (white) prices were 0.54£/kg, up 6.3% MoM and down 9.7% YoY. Brussel sprouts prices were 1.14£/kg, down 2.0% MoM, and down 31% YoY. Swede prices were 0.27£/kg, down 8.8% MoM, and down 5.5% YoY.

Any other business

No other issues were raised.

Date of next meeting

The next scheduled meeting of the UKAMMG will take place on 13 May 2025.



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