



Department  
for Environment  
Food & Rural Affairs

# Note of the meeting of the UK Agricultural Market Monitoring Group, 10 June 2025

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



Scottish Government  
Riaghaltas na h-Alba  
gov.scot



Department of  
**Agriculture, Environment  
and Rural Affairs**



Llywodraeth Cymru  
Welsh Government

# Contents

Introduction .....	3
Key points: Market situation .....	3
Intervention scheme announcements .....	3
Market inputs overview .....	3
Sector discussions .....	4
Beef .....	4
Sheep .....	4
Eggs .....	4
Poultry .....	4
Dairy .....	5
Arable .....	5
Pigs .....	5
Horticulture .....	5
Any other business .....	5
Date of next meeting .....	6

# Introduction

This note records the key points discussed at the meeting of the UK Agricultural Market Monitoring Group (UK AMMG) held on 10 June 2025. Present were representatives of Defra, Scottish Government, Welsh Government and DAERA (Northern Ireland). The meeting assessed issues impacting on the agricultural sector and reviewed the market situation across a range of UK 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

- Price movements in farming markets are largely stable. Livestock and dairy prices are above 5-year averages, but grain prices are generally below 5-year averages.
- There are some concerns about the recent period of prolonged dry weather in some areas (particularly for arable farms and milk producing areas) but it is too early to tell what the impacts may be on crop development or yield. The situation will continue to be closely monitored. The Met Office projections for June, July, August 2025 forecast warmer than average temperatures, near-average rainfall and near-average wind-speed.

## Intervention scheme announcements

No new market intervention schemes have been announced.

## Market inputs overview

**Oil and Gas:** In May 2025 the Brent crude oil price decreased month-on-month (MoM) by 10.3% and year-on-year (YoY) by 28%. In May 2025, red diesel prices were down 2.9% MoM, and down 17.2% YoY. In May 2025, European Natural Gas (TTF) prices were down 3% MoM and up 6.3% YoY.

**Pound Sterling:** Despite global uncertainties in changes to trade and tariff policies, the Pound Sterling reached a 3-year high against the US dollar in May 2025. In May 2025, the Pound showed mixed performance against the Euro but remained stable against the New Zealand Dollar and the Australian Dollar.

**Fertilisers:** Fertiliser demand in UK is still stable. Spring deliveries, especially of ammonium nitrate are continuing. No concerns have been identified as farmers are still able to purchase required fertilisers.

**Access to Labour:** Supply of seasonal workers continues to meet the labour demands for 2025.

## Sector discussions

### Beef

In March 2025, the monthly prime cattle deadweight price was up 5.6% MoM, 36% YoY, and 57% on the 5-year average. In March 2025, the monthly cow deadweight price was up 4.8% MoM, 42% YoY, and 59% on the 5-year average.

In April 2025, weekly average beef and veal production was up 3.8% MoM, down 4.5% YoY and down 1% on the 5-year average. In April 2025, weekly average prime cattle slaughter was up 4.1% MoM, down 5.4% YoY and down 0.6% on the 5-year average.

### Sheep

In April 2025, the monthly Standard Quality Quotation (SQQ) clean lambs' price was down 4.3% MoM, down 17% YoY and up 9.7% on the 5-year average.

In April 2025, weekly average mutton and lamb production was up 2.9% MoM, 15% YoY, and 5.2% on the 5-year average. In April 2025, weekly average clean sheep slaughter was up 1.7% MoM, 16% YoY, and 4.3% on the 5-year average.

### Eggs

The average egg price in Quarter 1 2025 was 148.3p/dozen, up 5.2% YoY. The total egg production for human consumption was 254.9 million dozen up 2.7% YoY and an increase of 2.7% on Q4 2024.

The weekly average for commercial layer eggs set in April 2025 was up 4.3% MoM, up 5.2% YoY and down 1.3% on the 5-year average. The weekly average for commercial layer chicks placed in April 2025 was down 16% MoM, up 3.2% YoY, and up 4.8% on the 5-year average.

It was confirmed that there have now been 64 confirmed cases of Avian Influenza (AI) in captive birds in the 2024/2025 season.

### Poultry

In April 2025, weekly average poultry meat production was up 8.5% MoM, 5.7% YoY and 5.7% on the 5-year average.

In April 2025, weekly average commercial broiler slaughter was up 4.4% MoM, 2.3% YoY and 2.5% on the 5-year average. In April 2025, the weekly average turkey slaughter was up 2.6% MoM, down 25% YoY, and down 33% on the 5-year average.

## **Dairy**

In March 2025, the Farmgate milk price (FGMP) was down 2.1% MoM, up 15% YoY, and up 26% on the 5-year average. In March 2025, the total volume was up 17% MoM, 3.8% YoY, and 3.8% on the 5-year average.

In April 2025, the Actual Milk Price Equivalent (AMPE) was down 1.3% MoM and up 16% YoY. In April 2025, the Milk for Cheese Value Equivalent (MCVE) was down 0.4% MoM and up 23% YoY. In April 2025, the Bulk Cream price had no change MoM, was up 29% YoY and up 55% on the 5-year average.

It was noted that organic milk production is increasing after falling in recent years.

## **Arable**

In May 2025, the price for bread milling wheat was up 0.3% week-on-week (WoW), down 5.8% MoM, and down 30% YoY. In May 2025, the price for feed wheat was down 0.3% WoW, 4.2% MoM, and 18% YoY. In May 2025, the price for oilseed rape was down 11% MoM and up 13% YoY.

## **Pigs**

In April 2025, the monthly average Standard Pig Price was up 0.5% MoM, down 2.7% YoY, and up 14% on the 5-year average.

In April 2025, the weekly average clean pig slaughter was up 2.6% MoM, up 0.1% YoY and down 3.6% on the 5-year average. In April 2025, weekly average pig meat production was up 2% MoM, up 0.2% YoY and down 2.1% on the 5-year average.

Restrictions on German imports due to Foot and Mouth were lifted in June. Personal import restrictions of products of animal origin are still in force at the UK border.

## **Horticulture**

In April 2025, the price for apples was up 7.1% MoM and down 5.7% YoY. In April 2025, strawberry prices were up 18% YoY. In April 2025, onion prices were 2.9% up MoM, and 26% down YoY. In April 2025, carrot prices were up 10% MoM, and down 31% YoY. In April 2025, lettuce prices were up 2.3% MoM and up 13% YoY. In April 2025, tomato prices were up 39% YoY.

## **Any other business**

No other issues were raised.

## Date of next meeting

The next scheduled meeting of the UKAMMG will take place on Tuesday 8 July 2025.



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