



Department  
for Environment  
Food & Rural Affairs

# Note of the meeting of the UK Agricultural Market Monitoring Group, 8 July 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 (UK AMMG) held on 8 July 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

- Livestock and dairy sectors are largely performing well, although livestock production has seen a slight decline, prices remain markedly above 5-year averages. Grain prices are generally below 5-year averages. The horticulture sector is experiencing a mix of increased and lower prices according to the commodity.
- There are concerns, particularly for arable and dairy farms, about the recent period of prolonged dry weather in some areas but it is too early to tell what the impacts may be on crop development or yields. 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 June 2025, the Brent crude oil price per barrel increased month-on-month (MoM) by 1.8% and decreased year-on-year (YoY) by 24.1%. In June 2025, Red diesel prices were down 1.8% MoM and 13.2% YoY. In June 2025, European Natural Gas prices increased 4.8% MoM and 6.9% YoY.

### Pound Sterling

In June 2025, despite global uncertainties in potential changes to trade and tariff policies, the Pound Sterling performed strongly against most major currencies and reached its highest level in over 3 years against the US Dollar.

## Fertilisers

Despite a reported shortfall in demand for UK fertilisers, UK farmers remain able to purchase sufficient stocks to meet their requirements and there are no serious issues.

## Access to Labour

Supply of seasonal workers continues to meet the labour demands for 2025.

## Sector discussions

### Horticulture

In May 2025, apple prices were slightly down 4.7% on the MoM trend and further down 13% YoY. Onion prices were up 6.1% MoM but down 24% YoY. Carrot prices were up 7.7% MoM but down 36% YoY. Lettuce prices were up 1.1% MoM, but down 6.4% YoY. Tomatoes were down 36% MoM and increased 7.4% YoY. Strawberries were down 31% MoM, but up 0.46% YoY. Raspberries were up 34% YoY.

### Beef

Prime cattle prices in May 2025 were down 2.3% MoM but up 41% YoY and 59% on the 5-year average. This has been driven by tight domestic supply and steady demand. In May 2025, GB deadweight cattle prices were up 2.4% MoM, 48% YoY, and 65% on the 5-year average.

UK beef production fell by 1.5 % MoM and by 3.7% YoY in May 2025. The 5-year average is down by 2.2%. Slaughter volumes are down by 0.41% MoM, 4.1% YoY, and 1.7% on the 5-year average.

### Sheep

GB Prices in May 2025 for Standard Quality Quotation (SQQ) Clean Lambs fell 1.8% MoM and 18% YoY but were up 2.3% on the 5-year average. by 2.3%. High carry-over of old season lambs boosted early 2025 supply, contributing to price pressure. Production in May 2025 fell 11% MoM, but there was an increase in production of 8.8% YoY and 2.3% against the 5-year average.

### Pigs

The Standard Pig Price (SPP) in May 2025 stood at 207 pence per kg. This is the highest price for 2025 so far. There was a MoM increase of 0.50% and although there is a YoY decline of 2.3%, prices remain 12% above the 5-year average.

In May 2025, UK weekly clean pig slaughter was down 4.2% MoM, up 0.42% YoY and down 4.1% on the 5-year average. In May 2025, UK weekly pig meat production was down 3.2% MoM, up 2% YoY and down 0.98% on the 5-year average.

## Arable

In May 2025, the price for bread milling wheat was up 0.28% week-on-week (WoW), down 5.8% MoM, and down 30% YoY. In May 2025, the price for feed wheat was down 0.28% WoW, 4.2% MoM, and 18% YoY. In May 2025, the price for oilseed rape was down 11% MoM and up 13% YoY

## Dairy

The UK farmgate milk price (FGMP) was down 1.3% MoM in May 2025 but up 13% YoY and up 25% on the 5-year average.

UK milk supply for May 2025 remained strong and was up 4.4% MoM, 5.7% YoY and 5% on the 5-year average.

Daily UK milk deliveries continued to be strong into late June 2025, up 7.4% YoY. UK growth includes 9.3% YoY growth in Northern Ireland.

In May 2025, the Actual Milk Price Equivalent (AMPE) was down 0.10% MoM but up 13% YoY and the Milk for Cheese Value Equivalent (MCVE) was down 2.2% MoM but up 18% YoY.

## Eggs

The average egg price in Quarter 1 of 2025 was 148.3 pence per dozen, up 5.2% YoY. The total egg production for human consumption in Q1 2025 was 254.9 million dozen up 2.7% YoY and down 0.5% on Quarter 4 of 2024. The weekly average for commercial layer eggs set in May 2025 was up 12% MoM, up 3.2% YoY and down 2.2% on the 5-year average. The weekly average for commercial layer chicks placed in May 2025 was down 8.2% MoM, 7.1% YoY and 11% on the 5-year average.

It was confirmed that there have now been 69 confirmed cases of Avian Influenza (AI) in captive birds in the 2024 to 2025 season.

## Poultry

In May 2025, weekly average poultry meat production was down 2.4% MoM, but up 1.9% YoY and on the 5-year average. In May 2025, weekly average commercial broiler slaughter was down 4.3% MoM, 1.6% YoY and down 3.1% on the 5-year average. In May

2025, the weekly average turkey slaughter was up 2.4% MoM, down 22% YoY, and down 39% on the 5-year average.

## Any other business

No other issues were raised.

## Date of next meeting

The next scheduled meeting of the UKAMMG will take place on Tuesday 9 September 2025.



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