



Department
for Environment,
Food & Rural Affairs

Note of the meeting of the UK Agricultural Market Monitoring Group, 9 September 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

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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 9 September 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 this month, prices remain markedly above 5-year averages. Input costs are also falling. Grain prices are generally below five-year averages; however supplies are ample.
- The potential impacts of prolonged dry weather in some areas of the UK and information on crop development and yields will be available once harvest is complete. Early indications are that the situation is variable by area. The potential impacts on availability and cost of forage/straw will continue to be monitored over the coming weeks. The Met Office projections for September, October, November 2025 forecast a higher chance of rain and wind. There is also an increased risk of stormy weather.

Intervention scheme announcements

No new market intervention schemes have been announced.

Market inputs overview

Oil and Gas: In August 2025, the Brent crude oil price per barrel increased month-on-month (MoM) by 0.2% and decreased year-on-year (YoY) by 15.1%. In August 2025, Red diesel prices were up 1.5% MoM and down 6.4% YoY. In August 2025, European Natural Gas prices decreased 1.4% MoM and 13.2% YoY.

Pound Sterling: In early August 2025, the Pound weakened against the Euro and the US Dollar but stabilised later in the month.

Fertilisers: Harvest is nearly complete and fertiliser demand in the UK is therefore currently weak.

Access to Labour: while uptake has been earlier than usual, potentially related to the earlier harvest, the supply of seasonal workers continues to meet the labour demands for 2025.

Sector discussions

Arable

In August 2025, the price for bread milling wheat was down 2.3% week-on-week (WoW), 2% MoM, and 18% YoY. In August 2025, the price for feed wheat was down 0.58% WoW, 0.92% MoM, and 7.3% YoY. In August 2025, the price for oilseed rape was down 0.34% MoM and up 5.3% YoY

Beef

Prime cattle prices in July 2025 were down 0.27% MoM but up 33% YoY and up 57% on the 5-year average. In July 2025, GB deadweight cattle prices were down 0.14% MoM, up 41% YoY, and up 57% on the 5-year average.

UK beef production fell by 2.6% MoM and by 8% YoY in July 2025. The 5-year average is down by 6.7%. Slaughter volumes are down by 4.1% MoM, 8% YoY, and 5.5% on the 5-year average.

Sheep

GB Prices in July 2025 for Standard Quality Quotation (SQQ) Clean Lambs increased 0.12% MoM, 14% YoY and 29% on the 5-year average. Strong EU demand (+25%) driven by supply shortages in the European Union, has supported prices. Production in July 2025 fell 13% MoM, increased 10% YoY and dropped 14% against the 5-year average.

Pigs

The Standard Pig Price (SPP) in July 2025 stood at 208p/kg. There was a MoM increase of 0.25% and although there is a YoY decline of 0.88%, prices remain 8.8% above the 5-year average.

In July 2025, UK weekly clean pig slaughter was down 1.9% MoM, 3.2% YoY and 4.7% on the 5-year average. In July 2025, UK weekly pig meat production was down 2% MoM, 3% YoY and 2.5% on the 5-year average.

Dairy

The UK farmgate milk price (FGMP) increased 1.9% MoM in July 2025, 11% YoY and 23% on the 5-year average.

UK milk supply for July 2025 remained strong and was up 5.6% YoY and 5.5% on the 5-year average, however there was a decrease of 6.4% MoM.

Daily UK milk deliveries continued to be firm into late August 2025, up 5.6% YoY. GB growth of 4.4% YoY is continuing to be augmented by more marked 11% YoY growth in Northern Ireland.

In August 2025, the Actual Milk Price Equivalent (AMPE) was down 1% both MoM and YoY. The Milk for Cheese Value Equivalent (MCVE) was down 1% MoM and up 1% YoY. Both remain firm in the context of strong ongoing UK milk supply.

Eggs

The average egg price in Quarter 2 2025 was 149p/dozen, up 3.7% YoY. The total egg production for human consumption in Q2 2025 was 264 million dozen up 5.7% YoY and up 2.4% on Q1 2025. The weekly average for commercial layer eggs set in July 2025 was down 15% MoM, up 4.1% YoY and 6.5% on the 5-year average. The weekly average for commercial layer chicks placed in July 2025 was down 11% MoM, up 7.9% YoY and up 9.3% on the 5-year average.

It was confirmed that there have now been 81 confirmed cases of Avian Influenza (AI) in captive birds in the 2024/2025 season.

Poultry

In July 2025, weekly average poultry meat production was up 4.1% MoM, but down 0.53% both YoY and on the 5-year average. In July 2025, weekly average commercial broiler slaughter was up 4.4% MoM, down 0.6% YoY and down 7.9% on the 5-year average. In July 2025, the weekly average turkey slaughter was up 33% MoM, down 9.1% YoY, and down 21% on the 5-year average.

Horticulture

In August 2025, apple prices showed a marginal increase of 2.6% MoM but a decrease of 13% YoY. Onion prices were down 3.5% MoM and 2.4% YoY. Carrot prices were down 7.4% MoM and 15% YoY. Lettuce prices were up 1.1% MoM, but down 5.2% YoY. Tomatoes were down 18% MoM and 31% YoY. Strawberries were down 16% MoM, but up 78% YoY. Raspberries were down 0.22% MoM and 0.93% YoY.

Beef and sheep population numbers

Over recent months, the UKAMMG has considered the declining trend in beef and sheep populations across the UK. We recognise that there are many factors which could be causing both historic and possible future declines in beef and sheep numbers. These

factors include changes to agricultural support schemes; wider economic policy such as increases to the minimum wage and National Insurance contributions; some possible efficiency gains; high prices tempting farmers to rear fewer animals to keep existing demand tight; and a longer-term trend of declining demand for red meat. UKAMMG noted that supporting evidence is relatively limited and it is not possible to evidence the specific impact of any individual factor. UKAMMG also noted that whilst beef and sheep population numbers have declined, production has remained relatively stable since 2008.

UKAMMG will continue to monitor production trends and livestock population declines and will review the population numbers for beef and sheep on an annual basis. The group will also review and consider further updates as new evidence becomes available.

Any other business

No other issues were raised.

Date of next meeting

The next scheduled meeting of the UKAMMG will take place on Tuesday 14 October 2025.



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