Note of the meeting of the UK Agricultural Market Monitoring Group, 14 October 2025

The UK Agricultural Market Monitoring Group comprises representatives from Defra, DAERA, Scottish Government and 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 14 October 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 production has seen a slight monthly drop but prices remain well above 5-year averages. UK and global dairy markets indicate some price correction is anticipated following 12 months of strong prices. UKAMMG continues to monitor longer term concerns around declining throughputs for beef and sheep. Dry weather has made for a difficult growing season: following the end of harvest, the majority of the main cereal crops saw reductions in yields in 2025 compared to the previous year, with winter barley the exception. The impacts on availability and cost of forage/straw will be monitored closely over the coming weeks.

The Met Office projections for October to December 2025 forecast a lower-than-normal chance of a wet period for the UK as a whole.

Intervention scheme announcements

No new market intervention schemes have been announced.

Market inputs overview

Oil and Gas: In September 2025 the Brent crude oil price decreased 1.1% month-on-month (MoM) and 11.3% year-on-year (YoY). In September 2025, red diesel prices were down 0.6% MoM, and up 0.1% YoY. In September 2025, European Natural Gas (TTF) prices were down 1% MoM and 10.3% YoY.

Pound Sterling: In September, the pound was broadly stable against major currencies. The Pound was also largely stable against the Euro but lost ground later in the month due in part to domestic economic challenges.

Fertilisers: Fertiliser demand is low for September 2025, and the fertiliser market continues to show little momentum.

Access to Labour: The supply of workers under the Seasonal Workers scheme continues to meet the labour demands for 2025.

Sector discussions

Dairy

In August 2025, the Farmgate milk price (FGMP) was up 3.6% MoM, and 9.7% YoY, and saw an increase of 23% on the 5-year average. In August 2025, the total volume was down 3.9% MoM, up 5.5% YoY, and up 5.5% on the 5-year average.

In September 2025, the Actual Milk Price Equivalent (AMPE) was down 7.8% MoM and 18% YoY. In September 2025, the Milk for Cheese Value Equivalent (MCVE) was down 11% MoM and 18% YoY. In September 2025, the Bulk Cream price was up 5.2% MoM, down 18% YoY and up 19% on the 5-year average.

Beef

In September 2025, the monthly prime cattle deadweight price was down 0.28% MoM, up 27% YoY, and up 46% on the 5-year average. In September 2025, the monthly cow deadweight price was up 0.12% MoM, 42% YoY, and up 63% on the 5-year average.

In September 2025, weekly average beef and veal production was down 4.1% MoM, and 6.5% YoY and down 7.7% on the 5-year average. In September 2025, weekly average prime cattle slaughter was down 5.2% MoM, 7.3% YoY and was down 7.3% on the 5-year average.

Sheep

In September 2025, the monthly Standard Quality Quotation (SQQ) clean lambs' price was down 7.1% MoM, but up 5.9% YoY and up 27% on the 5-year average.

In September 2025, weekly average mutton and lamb production was down 2.3% MoM, 6.6% YoY, and 16% on the 5-year average. In September 2025, weekly average clean sheep slaughter was down 3.5% MoM, 7.3% YoY, and 17% on the 5-year average.

Horticulture

In September 2025, the price for apples was up 0.07% MoM and down 32% YoY. This includes Royal Gala and Braeburn varieties. Onions prices were down 8.3% MoM and

6.2% YoY. Onions are seeing some impacts from prolonged dry weather and are mainly being imported from the Netherlands. Carrot prices were down 3.7% MoM and 5.9% YoY, with the majority sourced within the UK. Cauliflower prices were down 53% MoM and 46% YoY. There has been some volatility in supply in early stages of the cauliflower season which has also made prices volatile and a current shortage of cauliflowers this has led to a price increase. French cauliflowers are currently very expensive. Cabbage (white) prices were down 7.9% MoM and 7.8% YoY. Brussels Sprouts prices were up 67% MoM and down 3.1% YoY. Swedes were down by 10% MoM and 31% YoY. Tomatoes are from the continent as English tomatoes are at the end of season. As we move into the winter months, the UK AMMG will be focussing its discussions specifically on domestically produced commodities.

Arable

In September 2025, the price for bread milling wheat was up 0.78% Week-on-Week (WoW), down 4.7% MoM, and 22% YoY. In September 2025, the price for feed wheat was down 0.13% WoW, 0.33% MoM, and 7.8% YoY. In September 2025, the price for oilseed rape was down 0.36% MoM and up 4.5% YoY.

An increase in UK rapeseed production in 2025 may lead to fewer imports during the 2025/26 season.

Harvest is now complete and proved challenging for growers, with reductions in yields for most cereal crops except winter barley. Oilseed rape production rose by 5.5% in 2025 to 722 thousand tonnes, despite an 18% reduction in planted area.

Pigs

In September 2025, the monthly average Standard Pig Price was down 0.53% MoM, and 1.1% YoY, but up 9% on the 5-year average.

In August 2025, the weekly average clean pig slaughter numbers were down 4.0% MoM, and 5.4% YoY and down 8.5% on the 5-year average. In August 2025, weekly average pig meat production was down 4.5% MoM, 5.6% YoY and down 7.4% on the 5-year average.

Poultry

In August 2025, weekly average poultry meat production was down 4.4% MoM, but up 0.80% YoY and 0.80% on the 5-year average.

In August 2025, weekly average commercial broiler slaughter was down 6.6% MoM, 1.6% YoY and 1.7% on the 5-year average. In August 2025, the weekly average turkey slaughter was up 8.5% MoM and 1.5% YoY, but down 17% on the 5-year average.

UKAMMG is monitoring outbreaks of Avian Influenza across the poultry sector.

Eggs

The egg sector is showing continued growth. The average egg price in Quarter 2 2025 was 149p/dozen, up 0.46% on Q1 2025 and 3.7% YoY. The total egg production for human consumption was 264 million dozen up 2.4% on Q1 2025 and 5.7% YoY.

The weekly average for commercial layer eggs set in August 2025 was down 7.3% MoM, and 14% YoY but up 0.60% on the 5-year average. The weekly average for commercial layer chicks placed in August 2025 was down 5.7% MoM, and 4.2% YoY, but up 9.1% 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 11 November 2025.