



Department
for Environment
Food & Rural Affairs

Note of the meeting of the UK Agricultural Market Monitoring Group, 11 November 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	4
Sector discussions.....	4
Dairy	4
Beef.....	4
Sheep.....	5
Horticulture	6
Arable.....	5
Pigs	5
Poultry	6
Eggs	6
Any other business	6
Date of next meeting.....	7

Introduction

This note records the key points discussed at the meeting of the UK Agricultural Market Monitoring Group (UK AMMG) held on 11 November 2025. Present were representatives of Defra, the Scottish Government, the 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 is largely stable, although the group continues to monitor longer term declines for sheep and beef production. Pig production has returned to normal levels after hot and dry weather in August 2025 affected pig performance. Prices are stable in the pig sector, strong in beef and sheep sectors and remain well above 5-year averages in all three sectors.

Very strong global supply in the dairy sector is leading to price corrections in UK dairy commodities and farmgate milk prices are also expected to decline in the coming months following a year of strong prices. There are no supply issues at present in the poultry sector, but Avian Influenza (AI) outbreaks are being closely monitored. Stable prices and continued steady growth are being seen in the eggs sector.

Following a long period of dry weather, the UK is expected to experience a winter with near-average rainfall overall. The wet and mild weather seen in many areas so far this autumn has led to very good late season grazing. It has also led to very favourable conditions for drilling for winter plantings in the arable sector, which is now mostly complete.

The Agriculture and Horticulture Development Board's (AHDB's) Early Balance Sheets for 2025 to 2026 indicate tight balances for domestic wheat and barley, largely driven by production falls because of the earlier dry weather.

There is a good supply of winter fruit and vegetables, with prices above or within 4-year averages.

Intervention scheme announcements

No new market intervention schemes have been announced.

Market inputs overview

Oil and gas

In October 2025:

- the Brent crude oil price decreased 5.2% month-on-month (MoM) and 14.8% year-on-year (YoY)
- the red diesel prices were up 1.6% MoM, and up 4.6% YoY
- the European Natural Gas Title Transfer Facility (TTF) prices were down 1.1% MoM and 20.8% YoY

Pound Sterling

In October 2025, the pound weakened slightly against most major currencies.

Fertilisers

Fertiliser prices in Great Britain remained high in September 2025, showing a mostly small monthly increase but remaining significantly above last year's prices.

Access to labour

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

Sector discussions

Dairy

In September 2025

- the Farmgate milk price (FGMP) was up 3% MoM, and 7% YoY, and saw an increase of 23% on the 5-year average
- In addition, the total volume of milk produced was up 1.8% MoM, up 7.4% YoY, and up 7.6% on the 5-year average

In October 2025:

- the Actual Milk Price Equivalent (AMPE) was down 13% MoM and 26% YoY
- the Milk for Cheese Value Equivalent (MCVE) was down 9.9% MoM and 29% YoY
- the Bulk Cream price was up 23% MoM, down 36% YoY and up 10% 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
- the monthly cow deadweight price was up 0.12% MoM, 42% YoY, and up 63% on the 5-year average
- the weekly average beef and veal production was up 15% MoM, down 0.97% YoY and up 3% on the 5-year average
- the weekly average prime cattle slaughter was up 13% MoM, down 3% YoY and up 2.2% 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
- the weekly average mutton and lamb production was up 4.5% MoM, down 4.4% YoY, and down 12% on the 5-year average
- the weekly average clean sheep slaughter was up 4% MoM, down 5% YoY, and 14% on the 5-year average

World imports dropped by 14.9% in August 2025 compared with August 2024 and imports from the EU dropped by 22.2% over the same period.

Horticulture

In October 2025, the price for:

- apples were down 5.3% MoM and up 0.35% YoY
- onions were up 6.7% MoM and 5.4% YoY
- carrots were down 2.1% MoM and up 2.2% YoY
- cauliflower was up 35% MoM and down 5.2% YoY
- cabbage (white) was down 5% MoM and 7.1% YoY
- brussels sprouts was down 8.5% MoM and up 3.8% YoY
- swedes were down by 1.1% MoM and 24% YoY

No supply issues were reported.

Arable

In October 2025, the price for:

- bread milling wheat was up 2.4% Week-on-Week (WoW), and down 1.8% MoM, and 22% YoY
- feed wheat was down 0.16% WoW, 0.14% MoM, and 11% YoY
- oilseed rape was down 1.4% MoM and up 1.1% YoY

There were good conditions for drilling of winter plantings. Wheat is seeing a rise in production, but supplies remain tight.

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
- the weekly average clean pig slaughter numbers were up 8.7% MoM, up 1.3% YoY and down 0.3% on the 5-year average
- the weekly average pig meat production was up 11% MoM, 2% YoY and 1.2% on the 5-year average, showing a return to expected levels of production following summer weather disruptions in August 2025

In the year to August 2025, imports were down 8% from the EU and 7.9% from the world while exports decreased 4.3% to the EU but grew by 3.5% to world markets.

Poultry

In September 2025, the weekly average for:

- poultry meat production was up 5.9% MoM, 1.8% YoY and 1.8% on the 5-year average
- commercial broiler slaughter was up 7.2% MoM, 0.65% YoY and 0.59% on the 5-year average
- turkey slaughter was down 11% MoM, 10% YoY and 11% on the 5-year average

Eggs

Latest data on egg prices, production and market trends:

- the average egg price in quarter 3 of 2025 was 148p per dozen, down 0.44% on quarter 2 of 2025 and up 1.8% year-on-year (YoY)
- the total egg production for human consumption was 268 million dozen, up 2% on quarter 2 of 2025 and 5.1% YoY
- the weekly average for commercial layer eggs set in September 2025 was up 51% month-on-month (MoM), 15% YoY and 18% on the 5-year average – UKAMMG will monitor this impact once the quarter 1 and 2 2026 data is available
- the weekly average for commercial layer chicks placed in September 2025 was up 12% MoM, 8.7% YoY, and 22% on the 5-year average

The UKAMMG is monitoring the number and size of avian influenza outbreaks across the poultry and egg sectors, with particular focus on the seasonal poultry market.

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 December 2025.



© Crown copyright 2024

This information is licensed under the Open Government Licence v3.0. To view this licence, visit www.nationalarchives.gov.uk/doc/open-government-licence/

This publication is available at www.gov.uk/government/publications

Any enquiries regarding this publication should be sent to us at

UKAMMGSecretariat@defra.gov.uk

www.gov.uk/defra