



Department
for Environment
Food & Rural Affairs

Note of the meeting of the UK Agricultural Market Monitoring Group, 9 December 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 9 December 2025. Present were representatives of Defra, Scottish Government, Welsh Government and DAERA (Northern Ireland).

The meeting assessed current and ongoing 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

UK agriculture remains broadly stable heading into winter. The UK winter weather from December to February is forecast to be milder than average overall. Mild and wet conditions so far have supported late season grazing and excellent drilling for winter crops.

Beef and sheep prices are strong and well above the 5-year averages, while pig prices are steady with production recovering after summer weather disruptions. Red meat demand is expected to perform well over Christmas.

Dairy markets face downward pressure as global milk supply remains high, with farmgate prices likely to soften after a strong year. Poultry supply is secure for the festive season, despite ongoing declines in turkey throughput and hatchery placements with Avian Influenza (AI) outbreaks being closely monitored. Egg production continues steady growth.

Arable conditions have been favourable for winter drilling, now largely complete, though wheat and barley balances remain tight following earlier dry weather. Cereal prices are subdued, while oilseed rape prices are strong with increased planting intentions for 2026.

Horticulture supply is good, with most vegetable prices above or near historical averages. Overall, markets are stable, but global supply dynamics and disease risks remain key watchpoints.

Intervention scheme announcements

No new market intervention schemes have been announced.

Market inputs overview

Oil and Gas

In November 2025:

- the Brent crude oil price decreased 1.5% month-on-month (MoM) and 14.5% year-on-year (YoY)
- red diesel prices were up 1.0% MoM, and up 4.0% YoY
- European Natural Gas Title Transfer Facility (TTF) prices were down 2.8% MoM and 30.3% YoY

Pound Sterling

In November 2025, the pound dropped slightly against most major currencies.

Fertilisers

Fertiliser prices in Great Britain remained stable in October 2025, showing limited monthly changes but remaining significantly above 2024 to 2025 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 October 2025:

- the Farmgate milk price (FGMP) was up 1.1% MoM, and 2.4% YoY, and saw an increase of 19% on the 5-year average
- the weekly average UK volume of milk was up 3.8% MoM, up 7.0% YoY, and up 8.9% on the 5-year average
- the Bulk Cream price was down 12% MoM, 43% YoY and 20% on the 5-year average

In November 2025:

- the Actual Milk Price Equivalent (AMPE) was down 6.3% MoM and 31% YoY
- the Milk for Cheese Value Equivalent (MCVE) was down 4.7% MoM and 30% YoY

Beef

In October 2025:

- the monthly prime cattle deadweight price was up 1.4% MoM, 27% YoY, and 47% on the 5-year average
- the monthly cow deadweight price was also up 1.7% MoM, 47% YoY, and 72% on the 5-year average
- the weekly average beef and veal production was up 3.9% MoM, down 6.1% YoY and up 0.12% on the 5-year average

In September 2025:

- weekly average prime cattle slaughter was up 0.81% MoM, down 8.6% YoY and down 1.2% on the 5-year average.

Sheep

In October 2025:

- the monthly Standard Quality Quotation (SQQ) Clean Lamb Great Britain price was down 0.7% MoM, up 7.7% YoY, and up 25% on the 5-year average
- the weekly average mutton and lamb production was up 2.2% MoM but down 8.3% YoY and 13% below the 5-year average
- the weekly average clean sheep slaughter was up 2.6% MoM but down 9.9% YoY and 15% below the 5-year average

In September 2025:

- imports fell 5.4%, while exports rose 5.4% and were up 15% on the year-to-date

Horticulture

In November 2025:

- apple prices averaged were down 4.6% MoM and 2.1% YoY
- onion prices were down 4.1% MoM but up 6.2% YoY
- carrot prices were up 2.8% MoM and 11% YoY
- cauliflower prices were down 14% MoM but up 19% YoY
- white cabbage prices were up 4.1% MoM and 4.4% YoY
- brussels sprouts were up 0.05% MoM and 7.7% YoY
- swede prices fell 3.3% MoM and are down 22% YoY

Vegetable price movements reflect seasonal trends.

Arable

In November 2025, the price for

- bread milling wheat was down 1.5% Week on Week (WoW), up 2.0% MoM and down 17% YoY
- feed wheat was down 1.0% WoW, up 2.4% MoM, and down 7% YoY
- premium malting barley rose 3.0% WoW, 1.4% MoM, but fell 5.6% YoY
- feed barley increased 3.8% WoW, 4.7% MoM, and declined 1.5% YoY
- oilseed rape was up 3.3% MoM and down 1.8% YoY

Pigs

In October 2025:

- the monthly Standard Pig Price (SPP) deadweight Great Britain price was down 1.3% MoM and 1.6% YoY, but up 9.4% on the 5-year average
- the weekly SPP deadweight price on 22 November 2025 was up 0.19% WoW
- the weekly average clean pig slaughter was up 5.2% MoM, up 2.0% YoY, and up 0.34% on the 5-year average
- the weekly average pigmeat production was up 7.0% MoM, 3.8% YoY, and 2.4% on the 5-year average

The African Swine Fever (ASF) outbreak in Spain is currently being closely monitored.

Poultry

In October 2025:

- weekly average poultry meat production was down 0.41% MoM, up 2.2% YoY, and up 2.2% on the 5-year average
- weekly broiler slaughter averaged 22 million birds, down 0.40% MoM, and 0.69% YoY, but up 5.8% on the 5-year average
- boiling fowl slaughter averaged 0.60 million birds, down 13% MoM, up 19% YoY, and down 25% on the 5-year average
- turkey's ongoing trend is one of declining consumer demand and slaughter averaged 0.11 million birds, down 12% MoM, 21% YoY, and 36% on the 5-year average

Eggs

In quarter 3 of 2025:

- the average egg price was down 0.44% on quarter 2 2025 and up 1.8% YoY
- free-range egg prices were down 0.81% quarterly and down 0.20% YoY
- total egg production for human consumption was up 2% on quarter 2 2025 and up 5.1% YoY
- weekly average commercial layer eggs set in October was down 9.8% MoM, up 9.6% YoY, and up 6.0% on the 5-year average
- weekly average commercial layer chicks placed in October was up 18% MoM, up 3.3% YoY, and up 6.9% on the 5-year average

UKAMMG is closely monitoring the number and size of Avian Influenza outbreaks across the poultry and egg sectors.

Any other business

No other issues were raised.

Date of next meeting

The next scheduled meeting of the UKAMMG will take place on Tuesday 13 January 2026.



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