Hybu Cig Cymru
Meat Promotion Wales

HCC Market Bulletin

June 2025

"This month's Market Bulletin looks at how religious festivals influence consumer purchasing behaviour for lamb at retail in Great Britain."

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This research utilised data from Kantar and focussed on key religious events over a five-year period (2020-2025). Volume sales trends, demographic influences, and promotional effectiveness in shaping lamb consumption were all assessed as part of this research.

EASTER

Easter remains the most significant seasonal event for lamb, showing consistent spikes in volume sales each year. Although there was a slight decline in lamb volumes from Easter 2024 to 2025, this was primarily attributed to the exceptional performance in 2024. That year benefited from an elongated promotional window and favourable weather, which contributed to higher engagement from consumers. Lamb roasting joints saw the most substantial gains, with lamb steaks also experiencing a boost in 2025 due to sunnier weather and a later Easter celebration. Across all demographic groups, the pattern of purchasing remains broadly similar; however, retired consumers tend to make their purchases earlier in the run-up to Easter, and this early engagement appears to drive overall volume growth.

MUSLIM FESTIVALS

For Muslim festivals, the data presents a more nuanced picture. Eid al-Adha (also known as the Feast of Sacrifice) consistently emerges as the more impactful event in terms of lamb sales, with year-on-year volume growth observed, particularly in roasting cuts such as leg joints. By contrast, Eid al-Fitr (the end of Ramadan) does not appear to drive increased lamb volumes, and there is little evidence of specific cuts being favoured during Eid al-Fitr. Promotion levels during both Eid al-Adha and Eid al-Fitr remain minimal.

The timing of Ramadan overlapped with Easter in 2022, 2023, and 2024, therefore making it difficult to isolate its individual impact on consumer demand. However, Ramadan occurred earlier than the Christian events in 2025, and this data revealed no increase in lamb volume sales at GB retail. Nevertheless, some cuts (such as lamb roasting joints and chops) did experience volume growth compared to the previous month. This suggests that while Ramadan may influence purchasing preferences, its impact on overall volume is less pronounced and may require more targeted retail strategies to drive engagement.

CHRISTMAS

At Christmas, lamb also experiences a seasonal uplift, particularly during the four-week lead-in to the holiday. Despite this, lamb still represents the smallest share of the red meat category during this period. Volume growth during Christmas is driven almost entirely by roasting joints, with other cuts remaining relatively static. Since 2020, there has been a steady increase in volume per buyer, even though Christmas 2024 saw a slight decline compared to 2023. The strong promotional activity in 2023 likely contributed to this anomaly. Again, demographic trends reveal a minor difference: retired shoppers are more inclined to buy earlier in the Christmas period than other age groups.

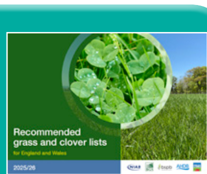
What does this mean for industry?

Lamb remains a key seasonal product across the UK, particularly during Easter and Christmas, where consumer behaviours and promotional activities align to produce clear volume uplifts. While the influence of Muslim festivals on lamb purchasing is present (particularly during Eid al-Adha) it is comparatively under-promoted. This represents a potential opportunity for retailers and producers to better target these periods and unlock additional demand through tailored strategies and culturally resonant promotions.

open now - MEAT MINDS - application window

Are you aged 21-35, are involved in the Welsh red meat supply chain, passionate about production and promotion, and interested in research and development? If so, Meat Minds could be for you! It aims to support and develop young people in the red meat supply chain by creating new networks, themed technical sessions and through mentoring. Read more about it here and download the application form. **Closing date 02/07/2025**.

2025/2026 'Recommended Grass and Clover List' – available now!



There are 13 new varieties on the list. The RGCL allows farmers to make choices on the most appropriate grass and clover seeds for their farms using reliable, independent data. This dedicated booklet is an invaluable tool for farmers and seed merchants to take advantage of the latest advances in genetics of grasses and clovers. Contact the HCC office for a hard copy, or download here.

CATTLE

Prices – week ending 21st June

The average deadweight prices in England and Wales for steers stood at **631.8p/kg**. This was:

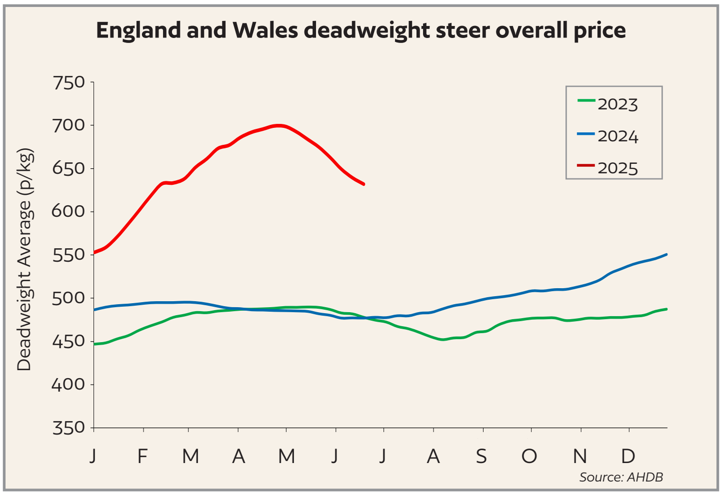
- - 7.3p on the previous week,
- 154.9p above year-earlier levels.

The deadweight prices for other cattle categories were as follows -

- Heifers: 629.0p/kg (- 9.0p on the week),
- Young bulls: 621.3p/kg (- 6.1p on the week), and
- Cull cows: 499.1p/kg (- 7.4p on the week).

Throughput – May 2025

- Total cattle throughput at UK abattoirs = 27,600 head – down 5% on the year.
- Total prime cattle throughput = 177,500 head – down 4% on the year.
  - ➢ *steers -6%, heifers -2%, and young bulls -3%*
- Average prime cattle carcase weights = 347.4kg (+2.9kg on the year).
- Adult cattle throughput = 43,200 head – down 6% on the year.



UK Beef & Veal Production May '25

75,900 tonnes -4% y-o-y

SHEEP

Prices – week ending 21st June

The deadweight* lamb price in GB averaged **748.8p/kg**. This was:

- + 24.6p on the previous week
- - 31.2p compared with year-earlier levels,
- 112.6p higher than the 5-year average (2020-24 average: 636.2p/kg).

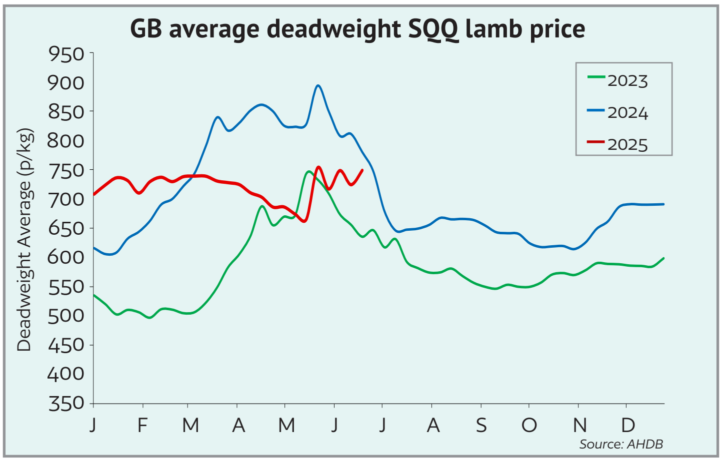
Numbers coming forward reached 28,600 head. This was:

- + 40% on the previous week
- - 3% compared with year-earlier levels

**Note: Old season lambs are shown from 1 January to the third Monday in May and new season lambs thereafter.*

Throughput – May 2025

- Total sheep throughput at UK abattoirs = 1.0 million head – up 9% on the year.
- Lamb throughput = 910,700 head – up 10% on the year.
- Average lamb carcase weights = 20.7kg (similar on the year).
- Cull ewe and ram throughput = 108,300 head – down 1% on the year.



UK Sheep Meat Production May '25

21,900 tonnes +9% y-o-y

PIGS

Prices – week ending 21st June

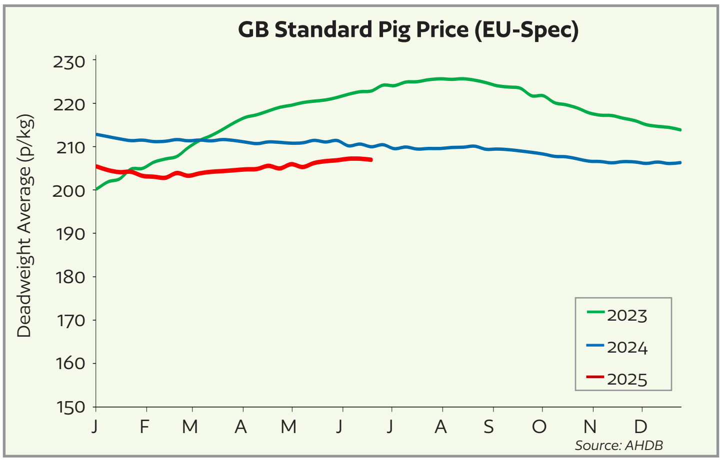
The EU-spec Standard Pig Price (SPP)* in GB stood at **207.0p/kg**. This was:

- - 0.3p on the previous week,
- - 3.0p compared with year-earlier levels,
- 19.0p higher than the 5-year average (2020-24 average: 187.9p/kg).

**Note: the APP is currently unavailable as the data does not meet validation thresholds. The SPP (which uses different data sources) is unaffected.*

Throughput – May 2025

- Total pig throughput at UK abattoirs = 872,200 head – up 1% on the year.
- Clean pig throughput = 855,500 head – up 0.4% on the year.
- Average clean pig carcase weights = 91.0kg (+1.2kg on the year)
- Sow and boar throughput = 16,600 head – up 11% on the year.



UK Pork Production May '25

80,400 tonnes +2% y-o-y