Hybu Cig Cymru
Meat Promotion Wales

HCC Market Bulletin

July 2025

"Defra has recently released the UK abattoir throughput figures for June which suggest beef production is subdued for the first 6 months of 2025, whilst sheep meat production has increased. This month's Market Bulletin looks at these figures in greater detail."

Glesni Phillips – Intelligence, Analysis and Business Insight Executive

CATTLE

During the first half (H1) of 2025, *the total* throughput of cattle at UK abattoirs reached just over **1.3 million head** according to the latest Defra figures. This represents a 4% decrease (or 57,000 head) compared to H1 of 2024, and is also 2.5% lower than the 5-year average for the same period. This year-on-year decline was primarily driven by a decrease in the number of prime cattle.

Prime cattle throughput in H1 of 2025 fell by 3% year-on-year, totalling 1.0 million head, which is also the lowest level since H1 of 2022. Steer slaughter numbers recorded their lowest level when compared to the most recent 5 year period at 507,100 head – down 5% on the year, and 4% lower than the 5-year average. Heifers recorded a year-on-year decline of 1% following the highs of 2024, however throughput levels remain elevated and were 4% higher than the 5-year average at 429,200 head. This elevated heifer throughput, which has been observed in recent years, now constitutes a growing proportion of prime cattle throughput. In H1 2021, heifers accounted for 38% of prime cattle slaughter, which has now increased to 42% in 2025. As the UK cow herd continues to be in a state of decline, elevated heifer throughput will do little to reverse this trend. Market reports suggest that numbers have remained seasonally low in recent weeks, with the recent dry spell leading to lighter, less finished animals.

Following two years of stability; *adult cattle* numbers declined by some 5% (or 14,200 head) on the year to stand at 287,300 head – which is also 5% lower than the 5-year average for the corresponding period. Adult cattle slaughter levels are subdued despite deadweight prices being notably strong so far in 2025. Averages reached historical highs of £5.37/kg during May, which was 50% higher on the year. Considering both throughput and carcass weights, total beef and veal production in the UK for H1 2025 stood at 445,400 tonnes, which is 4% lower than the levels recorded for H1 of both 2024 and 2023.

SHEEP

The total number of sheep and lambs processed at UK abattoirs during H1 2025 was **6.3 million head**, marking an increase of 3% (or 176,800 head) from the previous year, driven by an increased number of lambs coming forward.

Prime lamb slaughterings in H1 were up 4% (or 215,700 head) year-on-year to 5.6 million head – although this elevated level is in fact 5% lower than the highs of 2023. The second quarter of 2025 (Apr-Jun) recorded higher levels of throughput and drove the overall increase for H1, likely a result of delayed finishing times leading to increased numbers of Old Season Lambs coming forward. As a result, total lamb throughput is 1% higher than the 5-year average for the corresponding period. Supply increased in line with the rise in demand surrounding Easter in April this year, as throughput was almost 19% higher in April compared to year-earlier levels. Due to the natural supply trends in the UK, peak supply typically occurs in the latter half of the year, with numbers reaching around 6.0 million head during H2 of last year. Given the 5% fall in female breeding flock numbers as reported in the December survey, the 2025-26 lamb crop is expected to be smaller than the previous year's, leading to an overall reduction in numbers. In similar manner to beef; industry reports suggest there is lower availability of well-finished stock following the dry spell, whilst domestic availability is now seasonally dependent on new season lambs.

Throughput of *adult sheep* in H1 was a notable 6% lower than year-earlier levels to 654,000 head - the lowest throughput level on record. Tighter supplies have driven strong farmgate prices for adult sheep, with the December survey results suggesting sheep populations across the UK have contracted. The total volume of sheep meat produced in H1 of 2025 is 4% higher than year-earlier levels, at 135,100 tonnes.

PIGS

The *total* throughput of pigs at UK abattoirs in H1 2025 was up 3% when compared to year-earlier levels at almost **5.3 million head**. Compared to the 5-year average (2020-2024) for H1, the current throughput level is 3% lower. Pig meat production for the year to date stands 4% ahead of last year at 483,400 tonnes, attributed to increased throughput and marginally heavier carcass weights.

What does this mean for industry?

Both the beef and sheep sectors will likely experience price volatility as production levels remain constrained in the latter half of 2025. Ongoing dry spells/extreme weather could also affect grass growth and feed availability, leading to lighter, less finished livestock and possibly impacting slaughter numbers.

CATTLE

Prices – week ending 12th July

The average deadweight prices in England and Wales for steers stood at **636.0p/kg**. This was:

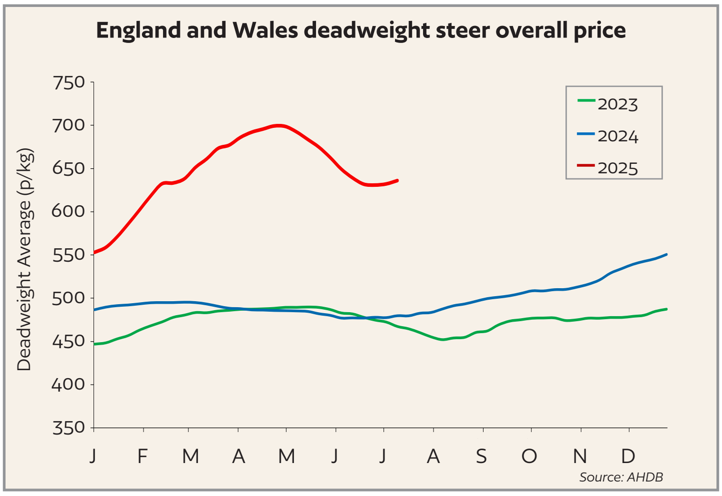
- + 3.9p on the previous week,
- 156.4p above year-earlier levels.

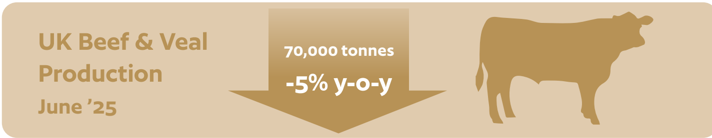
The deadweight prices for other cattle categories were as follows -

- Heifers: 632.8p/kg (+2.0p on the week),
- Young bulls: 627.1p/kg (-0.3p on the week), and
- Cull cows: 505.5p/kg (+5.5p on the week).

Throughput – June 2025

- Total cattle throughput at UK abattoirs = 210,700 head – down 5% on the year.
- Total prime cattle throughput = 162,400 head – down 5% on the year.
  - ➢ *steers -7%, heifers -2%, and young bulls -2%*
- Average prime cattle carcase weights = 345.0kg (-2kg on the year).
- Adult cattle throughput = 43,100 head – down 6% on the year.





SHEEP

Prices – week ending 12th July

The deadweight* lamb price in GB averaged **730.6p/kg**. This was:

- - 3.6p on the previous week
- - 85.0p compared with year-earlier levels,
- 140.2p higher than the 5-year average (2020-24 average: 590.4p/kg).

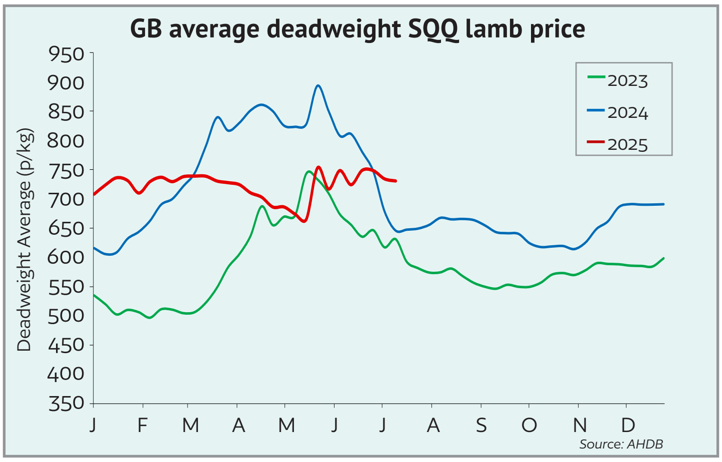
Numbers coming forward reached 27,600 head. This was:

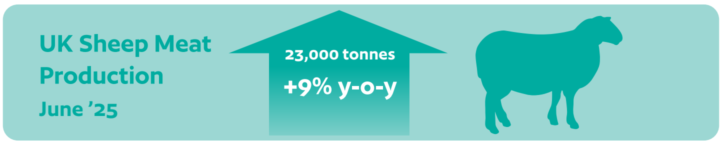
- - 0.6% on the previous week
- - 31% compared with year-earlier levels

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

Throughput – June 2025

- Total sheep throughput at UK abattoirs = 1.1 million head – up 8% on the year.
- Lamb throughput = 960,400 head – up 9% on the year.
- Average lamb carcase weights = 20.4kg (+ 0.5kg).
- Cull ewe and ram throughput = 125,100 head – up 2% on the year.





PIGS

Prices – week ending 12th July

The EU-spec Standard Pig Price (SPP)* in GB stood at **207.7p/kg**. This was:

- +0.2p on the previous week,
- - 2.2p compared with year-earlier levels,
- 17.5p higher than the 5-year average (2020-24 average: 190.2p/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 – June 2025

- Total pig throughput at UK abattoirs = 861,800 head – up 2% on the year.
- Clean pig throughput = 846,100 head – up 3% on the year.
- Average clean pig carcase weights = 90.1kg (+ 0.3kg on the year)
- Sow and boar throughput = 15,700 head – down 22% on the year.