

“ Recently released data from the British Cattle Movement Service (BCMS) highlights emerging trends in the beef market. This month’s Market Bulletin examines those trends in detail and explores their implications for future domestic supply. ”

Glesni Phillips – Intelligence, Analysis and Business Insight Executive



## GB CATTLE POPULATION OVERVIEW

As of 1 July 2025, the total cattle and calf population in Great Britain (GB) stood at 7.7 million head. This represents a year-on-year decline of 1% (or almost 83,800 head), and a further 3% decrease compared to July 2023. Beef cattle numbers fell by 0.8% to 5.1 million head, while the dairy herd contracted by 1.5% to 2.7 million head, continuing the downward trend observed in recent years.

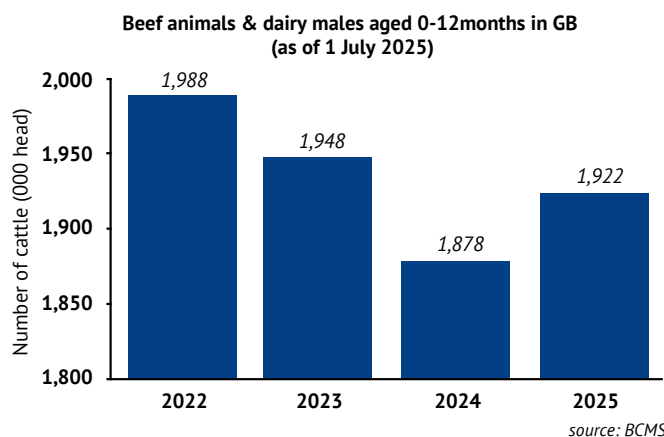
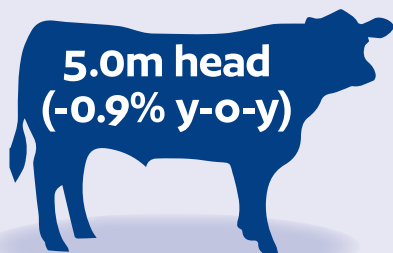
The population of cattle aged over 30 months stood at 2.7 million head, a decline of 1.5% from the previous year, and 3% lower than in 2023. Within this category, breeding females over 30 months - an indicator of the breeding herd size - decreased by 1.5% to 2.6 million head. This reduction was driven by a 3% contraction in the beef breeding herd at 1.2 million head, whilst the dairy breeding herd held steady at 1.4 million head.

## LOOKING AHEAD

Examining cattle categories and age brackets provides insights into potential market supply in the short and longer term. The population of cattle under 30 months as of 1 July 2025 fell to just under 5.0 million head - a 0.9% reduction compared to the previous year.

Data for beef cattle and dairy males aged **12-30 months** give an indication of the potential supply of prime cattle onto the market in the **short term**. There were 3% fewer animals on the ground when compared to both July 2024 and 2023. Fewer prime-ready cattle suggests tighter near-term supply when compared to historical levels, though some of these cattle may be used as suckler replacements.

### Cattle aged under 30 months in GB =



For the **longer term**, the population of beef cattle and dairy males aged **0-12 months** rose 2% higher than July 2024 at 1.9 million head – however, this level is 1% smaller than 2023, and 3% smaller than 2022. Within this category, the number of beef animals recorded a notable increase – females up 2% on the year, and males up by 3%. This suggests that prime cattle supply may be more plentiful compared to year-earlier levels, however numbers will remain historically tight further down the line.

## UK BEEF PRODUCTION TRENDS

Data from Defra from January to July 2025 suggests that prime cattle throughput fell by 4% compared to the same period in 2024, reaching just shy of 1.8 million head. As a result, total beef production over that period is down 5% when compared to 2024, and 2% less than 2023. Despite tighter supply, deadweight prices on the market have been strong and trending higher than historical levels. At the start of August, the steer deadweight price in England

and Wales averaged almost £6.40/kg – some 30% higher than year-earlier levels, and 49% above the longer term 5-year average. Prime cattle averages have been on the rise since the end of 2024, with the stronger prices now filtering through to consumer level. According to the latest data, the average price of beef at retail in GB was up by almost 19% on the year at £11.66/kg (Worldpanel by Numerator UK, 12 w/e 13 July 2025). Combined with ongoing cost-of-living pressures, consumers face squeezed spending power.

## CATTLE POPULATION IN WALES:

*The trends within the cattle population in Wales largely reflect those seen across GB. As of 1 July 2025, Wales had 1.1 million cattle, representing 14% of the GB herd and marking a year-on-year decline of 2.5%. The potential supply of prime animals in the short term (as categorized above) was down 2% on the year, whilst the potential supply in the longer term was up 4% - but similar to July 2023.*

# Monthly Market Round-Up

## CATTLE

### Prices – week ending 16<sup>th</sup> August

The average deadweight prices in England and Wales for steers stood at **639.8p/kg**. This was:

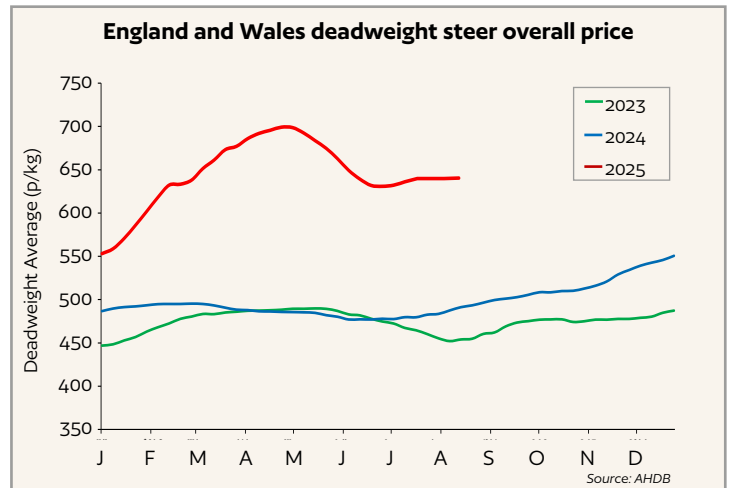
- + 0.3p on the previous week,
- 148.6p above year-earlier levels.

The deadweight prices for other cattle categories were as follows -

- Heifers: 635.6p/kg (+0.8p on the week),
- Young bulls: 634.5p/kg (+5.0p on the week), and
- Cull cows: 505.8p/kg (+1.7p on the week).

### Throughput – July 2025

- Total cattle throughput at UK abattoirs = 211,700 head – down 8% on the year.
- Total prime cattle throughput = 161,900 head – down 8% on the year.
  - steers -9%, heifers -7%, and young bulls -9%
- Average prime cattle carcase weights = 348.1kg (+1.7kg on the year).
- Adult cattle throughput = 45,300 head – down 8% on the year.



**UK Beef & Veal  
Production  
July '25**

70,800 tonnes  
-8% y-o-y



## SHEEP

### Prices – week ending 16<sup>th</sup> August

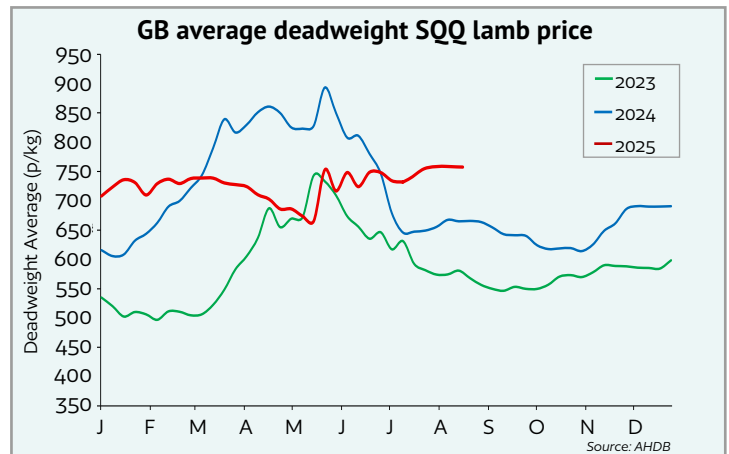
The deadweight\* lamb price in GB averaged **753.5p/kg**. This was:

- - 1.2p on the previous week
  - +88.7p compared with year-earlier levels,
  - 198.5p higher than the 5-year average (2020-24 average: 555.0p/kg).
- Numbers coming forward reached 33,300 head. This was:
- +1% on the previous week
  - - 13% 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 – July 2025

- Total sheep throughput at UK abattoirs = 1.1 million head – similar on the year.
- Lamb throughput = 892,100 head – up 1% on the year.
- Average lamb carcase weights = 19.8kg (+ 2.3kg).
- Cull ewe and ram throughput = 109,900 head – down 7% on the year.



**UK Sheep Meat  
Production  
July '25**

20,700 tonnes  
+10% y-o-y



## PIGS

### Prices – week ending 16<sup>th</sup> August

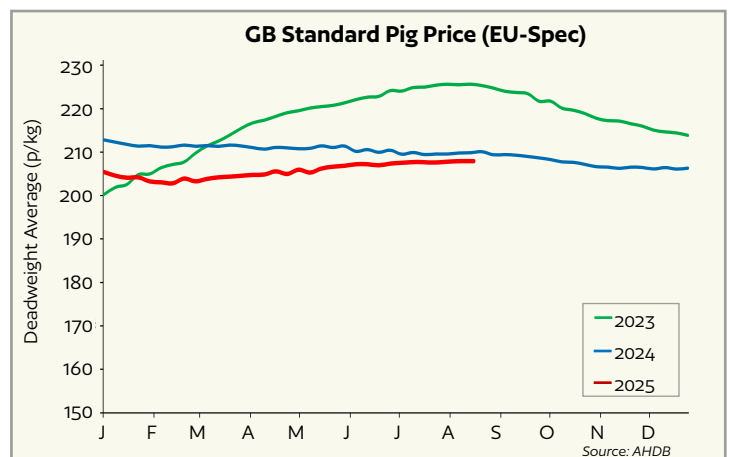
The EU-spec Standard Pig Price (SPP)\* in GB stood at **207.8p/kg**. This was:

- -0.3p on the previous week,
- - 2.1p compared with year-earlier levels,
- 16.4p higher than the 5-year average (2020-24 average: 191.3p/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 – July 2025

- Total pig throughput at UK abattoirs = 876,300 head – down 3% on the year.
- Clean pig throughput = 859,200 head – down 3% on the year.
- Average clean pig carcase weights = 87.9kg (-1.7kg on the year)
- Sow and boar throughput = 17,200 head – down 2% on the year.



**UK Pork  
Production  
July '25**

78,200 tonnes  
-5% y-o-y

