Hybu Cig Cymru
Meat Promotion Wales

HCC Market Bulletin

October 2025

> This month's Market Bulletin focuses on the UK sheep sector, highlighting current trends and key factors influencing the market at the moment.
>
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The GB prime lamb deadweight average peaked at £7.56/kg in early August. Since the highs of the summer, the average has eased somewhat – but has remained above year-earlier levels so far during the second half of 2025. The most recent average stands some 7% higher than year-earlier levels at £6.61/kg - whilst marking it's the fourth consecutive week of price declines.

SUPPLY

According to Defra, total sheep & lamb throughput for 2025 (up to September) is steady on year-earlier levels at 9.3 million head – just **0.2% higher** than the same period in 2024. Within this total, the number of adult sheep processed is down 7% on the year at 1.0 million head, whilst prime lamb throughput has recorded a 1% increase to 8.3 million head. Prime lambs made up 89.2% of the total throughput (compared to 87.7% in 2023).Despite stable throughput, total sheep meat production is **2% higher** on the year at 197,200 tonnes. This increase is driven by heavier carcase weights from the higher carry over of Old Season Lambs processed earlier in the year. As New Season Lambs (NSL) move to dominate supply, weights are expected to mirror seasonal averages again.

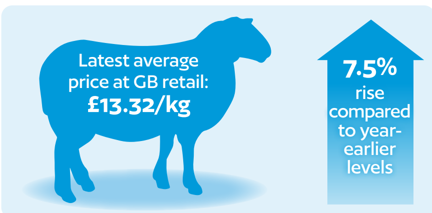
Looking at the lamb crop year so far (which runs from May onwards); UK abattoirs have processed 4.6 million lambs - a 2% rise year-on-year, though still below historical averages. We are awaiting the *UK June 2025 Survey* results, however preliminary data for *England* suggests a 5% decline in their lamb crop, which may impact domestic production going forward. A smaller breeding flock also points to a reduced lamb crop for the 2026 lambing season.

TRADE

HMRC data shows fresh/frozen sheep meat exports from the UK in August 2025 fell 2% year-on-year to 6,100 tonnes, mainly due to reduced EU shipments. However, year-to-date UK exports are **up 13%** at 55,300 tonnes, with 95% of shipments destined for the EU. Demand within the EU is strong due to a fall in sheep meat production year on year in many of the key producer countries. With domestic production in the UK up 3% during the same 8-month period, it's likely the UK had more product available to meet this increased demand. The value of these exports rose by 15% on the year to £425.2 million, reflecting strong domestic prices.

Imports of fresh/frozen sheep meat for the first 8 months of 2025 are **up 7%** on the year to 50,600 tonnes. August imports alone however fell by 15% on the year, following a surge during July with imports almost 30% higher on the year. EU-origin imports are down 17%, while non-EU imports rose 10%, led by Australia. Australian volumes increased by nearly 5,000 on the year – totalling 15,800 tonnes, and accounting for a third of total imports during 2025 so far, despite exceptionally high lamb prices there due to supply constraints during their traditionally low supply period. New Zealand imports fell by 2% on the year, but continues to account for the majority (58%) of imported volume. Looking ahead, future import levels will depend on UK production and southern hemisphere pricing.

DEMAND



According to the latest data from Worldpanel by Numerator UK, grocery price inflation rose to 5.2% in the four weeks to 5 October - similar to July levels. Consumers continue to face higher retail prices, leading many to adjust their spending. Online sales at the grocers grew by 12% compared with the same four weeks last year, making up 13% of the market – the highest share since March 2022.

For lamb; the average price at retail across GB has been on the rise. During the latest 12 week period ending 5th October 2025, the average price stood at £13.32/kg. This is a notable **7.5% rise** when compared to year-earlier levels, and has put pressure on the spending power of consumers. Volume sales fell by 25% on the year, whilst spend on lamb was down 19%. The data suggests consumers are buying less volume with each trip, and less frequently overall. Despite a strong performance during Easter, volume sales of lamb for the year to date are down some 15% on the year.

What does this mean for industry?

The UK sheep meat industry is navigating a complex landscape of strong export demand, stable domestic production, and shifting consumer behaviour. While higher farmgate prices and export values are positive for producers, reduced retail volumes and a smaller lamb crop signal potential challenges ahead.

Monthly Market Round-Up

CATTLE

Prices – week ending 25th October

The average deadweight prices in England and Wales for steers stood at **650.4p/kg**. This was:

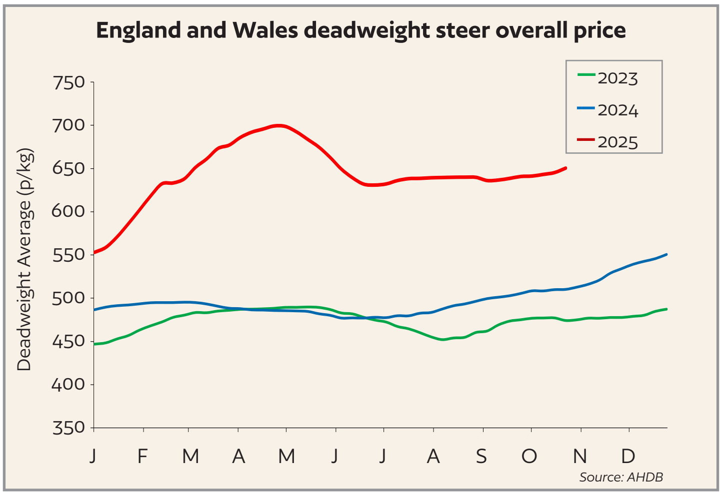
- + 5.2p on the previous week,
- 140.2p above year-earlier levels.

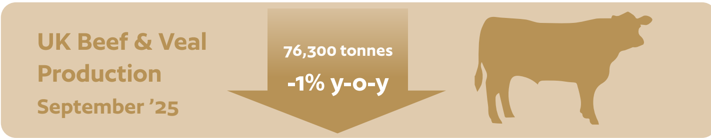
The deadweight prices for other cattle categories were as follows:

- Heifers: 646.0p/kg (+ 3.0p on the week),
- Young bulls: 639.2p/kg (+ 6.9p on the week), and
- Cull cows: 521.1p/kg (+ 8.1p on the week).

Throughput – September 2025

- Total cattle throughput at UK abattoirs = 230,900 head – down 3% on the year.
- Total prime cattle throughput = 169,600 head – down 3% on the year.
  - ➢ *steers -5%, heifers -3%, and young bulls +7%*
- Average prime cattle carcase weights = 347.3kg (+5kg on the year).
- Adult cattle throughput = 54,600 head – down 0.3% on the year.





SHEEP

Prices – week ending 25th October

The deadweight* lamb price in GB averaged **661.4p/kg**. This was:

- - 0.9p on the previous week
- + 42.2p compared with year-earlier levels,
- 124.1p higher than the 5-year average (2020-24 average: 537.3p/kg).

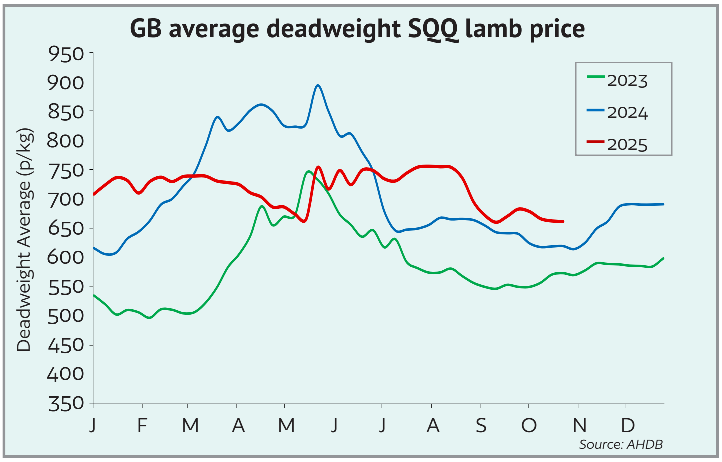
Numbers coming forward reached 37,000 head. This was:

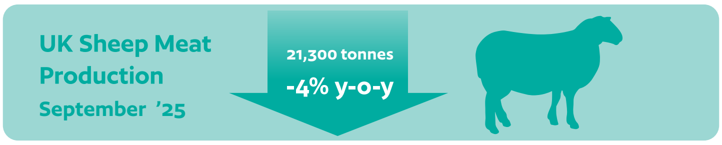
- - 4% on the previous week
- - 14% compared with year-earlier levels

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

Throughput - September 2025

- Total sheep throughput at UK abattoirs = 1.0 million head – down 6% on the year.
- Lamb throughput = 906,200 head – down 5% on the year.
- Average lamb carcase weights = 20.1kg (-0.5kg on the year).
- Cull ewe and ram throughput = 126,500 head – down 10% on the year.





PIGS

Prices – week ending 25th October

The EU-spec Standard Pig Price (SPP)* in GB stood at **203.7p/kg**. This was:

- 0.3p on the previous week,
- - 3.5p compared with year-earlier levels,
- 17.4p higher than the 5-year average (2020-24 average: 186.3p/kg).

**Note: the APP data series is no longer available as the data no longer meets validation thresholds. The SPP (which uses different data sources) is unaffected.*

Throughput – September 2025

- Total pig throughput at UK abattoirs = 885,500 head – up 1% on the year.
- Clean pig throughput = 869,000 head – up 1% on the year.
- Average clean pig carcase weights = 90.7kg (-0.8kg on the year)
- Sow and boar throughput = 16,500 head – down 6% on the year.