Hybu Cig Cymru
Meat Promotion Wales

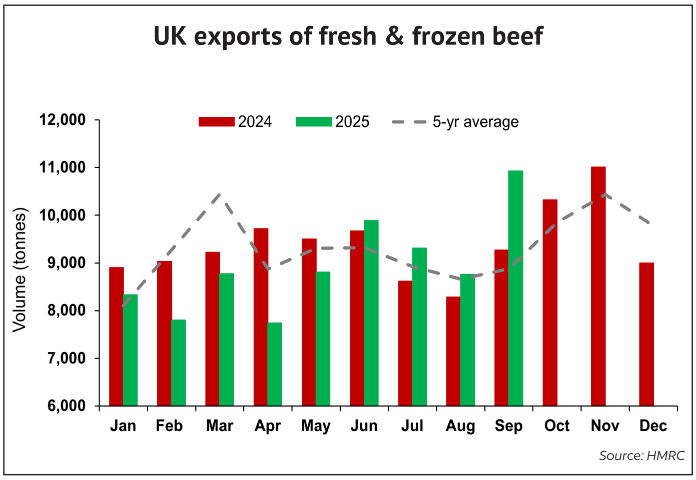
HCC Market Bulletin

November 2025

> This month's Market Bulletin examines export developments within the UK beef sector, global supply pressures, and the continued contrast between strong international demand and more subdued domestic consumption.
>
> Glesni Phillips – Intelligence, Analysis and Business Insight Executive

UK BEEF EXPORT PERFORMANCE

According to recent data from HMRC; year-to-date UK exports of fresh & frozen beef (January to September) stand around 2% lower than the same period in 2024. This slight decline largely reflects tighter cattle availability earlier on the domestic market. More recently, export performance has strengthened considerably, with monthly shipments during late summer and early autumn exceeding year-earlier levels. The most recent monthly volume during October stood almost 20% higher than the corresponding month in 2024, at almost 11,000 tonnes. Export values have remained firm throughout 2025, supported by elevated farmgate prices and the ability of UK exporters to meet consistent demand across both EU and non-EU markets. EU destinations continue to dominate overall volumes, while markets in Asia and the Middle East have shown renewed interest as global supplies tighten. Carcase balancing also remains an important strategic benefit, as certain beef cuts continue to attract competitive prices overseas.

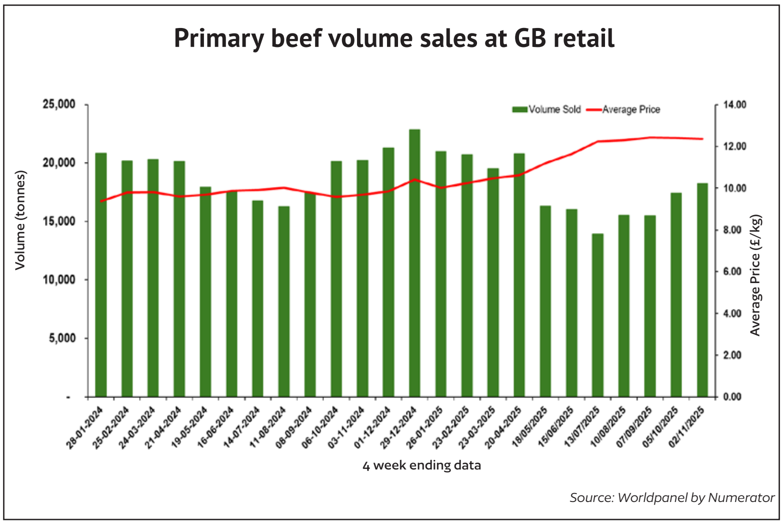


GLOBAL BEEF SUPPLY

Global beef supply conditions remain tight, with major exporting nations such as Australia, the United States and Brazil managing reduced cattle availability, weather-related challenges and herd rebuilding phases. These constraints have contributed to a global shortage of beef, lifting international prices and increasing demand for high-quality product from reliable suppliers. The current supply environment has strengthened the UK's competitive position, particularly in premium markets seeking high-welfare beef during a period of global tightness. A favourable Sterling position against key exporting nations has provided additional support, helping UK product remain attractive to international buyers. Overall, the global outlook suggests that supply constraints will continue into early 2026, maintaining strong interest in UK beef.

DOMESTIC CONSUMER DEMAND

While export performance has shown encouraging momentum, domestic consumer demand for beef remains more subdued. Retail prices across GB continue to track at elevated levels due to tight domestic supply and sustained farmgate prices, which has influenced household purchasing behaviour. Recent retail data from Worldpanel by Numerator (formerly known as Kantar) indicates a reduction in beef volumes sold when compared to year-earlier levels, with consumers opting either to reduce the frequency of beef purchases or to switch towards more affordable protein options. Foodservice demand has remained relatively steady, although wider cost pressures across the sector continue to limit stronger growth. Despite these pressures, the domestic market remains an important outlet, particularly for higher-value cuts.



What does this mean for industry?

The combination of firm global demand, tighter international supplies and strengthening monthly export performance continues to provide underlying support to UK farmgate beef prices. Although domestic consumer demand remains sensitive to high retail prices, international markets are expected to play an increasingly important role in sustaining returns for producers. Looking ahead, the balance between constrained domestic supply, softening household consumption and strengthening global interest will remain a key feature of the market as the sector moves towards 2026.

CATTLE

Prices – week ending 22nd November

The average deadweight prices in England and Wales for steers stood at **661.0p/kg**. This was:

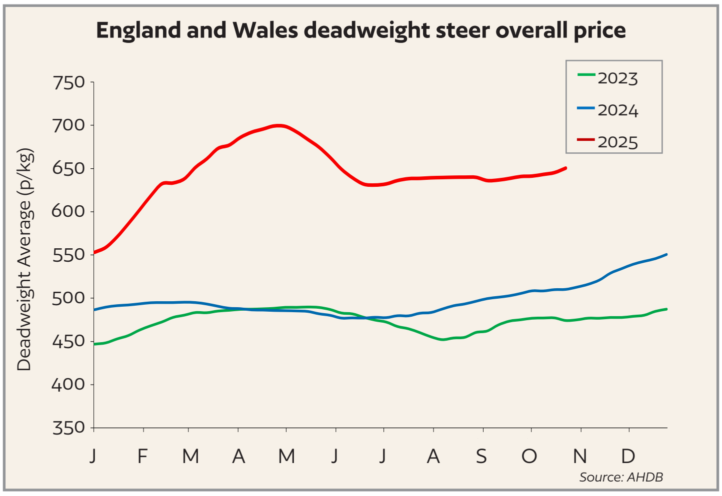
- + 0.7p on the previous week,
- 131.9p above year-earlier levels.

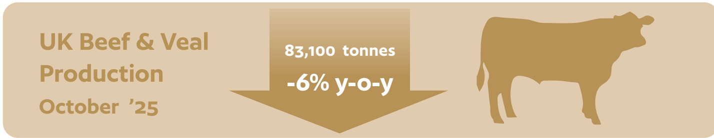
The deadweight prices for other cattle categories were as follows:

- Heifers: 656.4p/kg (+ 0.5p on the week),
- Young bulls: 653.2p/kg (+ 6.6p on the week), and
- Cull cows: 518.5p/kg (- 3.8p on the week).

Throughput – October 2025

- Total cattle throughput at UK abattoirs = 252,400 head – down 8% on the year.
- Total prime cattle throughput = 179,200 head – down 9% on the year.
    - ➢ *steers -10%, heifers -8%, and young bulls +1%*
- Average prime cattle carcase weights = 347.7kg (+8kg on the year).
- Adult cattle throughput = 65,200 head – down 7% on the year.





SHEEP

Prices – week ending 22nd November

The deadweight* lamb price in GB averaged **695.0p/kg**. This was:

- + 3.0p on the previous week
- + 33.8p compared with year-earlier levels,
- 123.1p higher than the 5-year average (2020-24 average: 571.9p/kg).

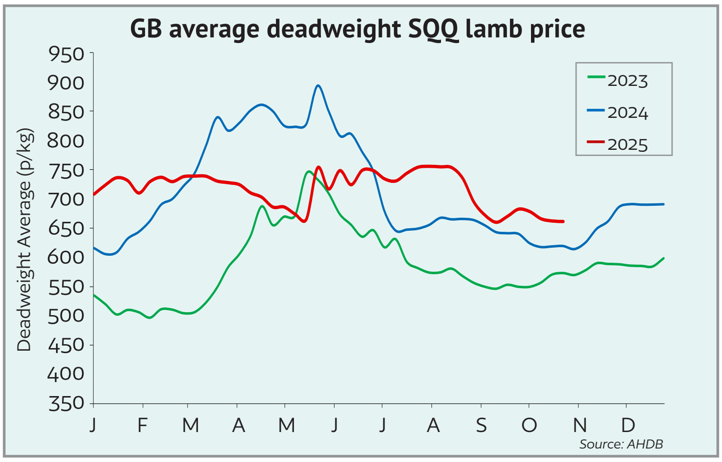
Numbers coming forward reached 35,000 head. This was:

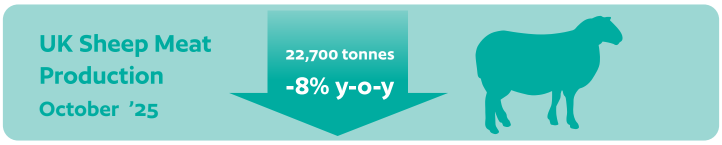
- - 1% on the previous week
- - 8% compared with year-earlier levels

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

Throughput - October 2025

- Total sheep throughput at UK abattoirs = 1.0 million head – down 10% on the year.
- Lamb throughput = 971,800 head – down 10% on the year.
- Average lamb carcase weights = 20.5kg (+0.6kg on the year).
- Cull ewe and ram throughput = 119,100 head – down 11% on the year.





PIGS

Prices – week ending 22nd November

The EU-spec Standard Pig Price (SPP)* in GB stood at **200.7p/kg**. This was:

- + 0.4p on the previous week,
- - 5.8p compared with year-earlier levels,
- 16.3p higher than the 5-year average (2020-24 average: 184.4p/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 – October 2025

- Total pig throughput at UK abattoirs = 964,400 head – up 2% on the year.
- Clean pig throughput = 946,300 head – up 2% on the year.
- Average clean pig carcase weights = 92.0kg (+1.9kg on the year)
- Sow and boar throughput = 18,100 head – down 8% on the year.