Hybu Cig Cymru
Meat Promotion Wales

HCC Market Bulletin

December 2025

> This month's Market Bulletin takes a look at UK June 2025 survey results which were released mid-December, and how livestock numbers may impact on supply further down the line.
>
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CATTLE

Data from Defra shows that the total number of cattle and calves in the UK fell slightly in June 2025, from 9.41 million to **9.29 million head** – a decrease of 1.3% (120,000 head) compared to 2024. This continues the ongoing decline in the UK herd. The overall breeding herd* (beef & dairy) contracted by 1% to 3.1 million head, driven by a 4% reduction in the **beef breeding herd** to 1.3 million head. This is now the smallest beef breeding herd on record, and is 18% smaller than in 2015. Meanwhile, the **dairy breeding herd** recorded a near 1% year-on-year increase to 1.9 million head, bringing levels similar to those seen in 2020.

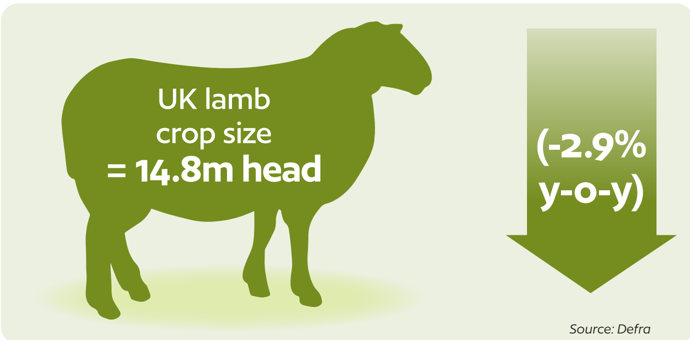
Despite a small increase in the dairy breeding herd, the majority of the cattle categories recorded year-on-year declines. Cattle aged less than 1 year (both males & females) recorded small year-on-year increases, however with all other categories recording declines, this does suggest that current levels may not offset the decline in the UK herd – and in particular, the beef breeding herd. Cattle aged 1 to 2 years experienced a 2% decrease, with both the beef & dairy categories experiencing declines of 3% and 1%, respectively. Cattle aged less than 1 year old were more stable on the year, and recorded a 0.2% increase. The male cattle population decreased by 1% overall, with those aged over 1 year old falling by 4% on the year - although a 2% rise in males aged less than 1 year may provide some support to slaughter numbers in later years. This data does suggest a potential reduction in prime beef supplies and production volumes during the short to medium term.

**a breeding cow in the context of this release is defined as a cow that has calved.*

SHEEP

Defra data shows the total sheep and lamb population in the UK contracted by 1.7% to **30.5 million head**. The decrease of 533,100 head on the previous year marks the smallest flock size on record since the June survey began recording in 1984. This decline was driven by reductions across most sheep categories. The **female breeding flock** fell by 0.7% (or 102,000 head) to 14.8 million head, however those intended for first time breeding recorded a notable increase of 6% on the year. This is encouraging news for the sector, and could indicate an increased number of replacements entering the breeding cycle.

The results indicate the **lamb crop** (aged under one year old) fell by almost 3% to stand at 14.8 million head - the smallest lamb crop on record since the survey began. This decrease has already impacted slaughter availability for the current lamb crop (May 2025 – April 2026), with throughput levels (May-Nov) 2% below the previous year. An increase in the number of first-time breeding ewes may support a larger lamb crop next year, however a number of factors will influence this.



PIGS

As of June 2025, the UK pig population stood at **4.7 million head** - a 0.5% increase from 2024. This growth was driven entirely by a near 37,000 head increase in the number of **fattening pigs**, bringing their total to 4.3 million head. However, the **female breeding herd** declined by 3% to 316,400 head.

JUNE 2025 SURVEY RESULTS FOR WALES:

> Cattle & calves = 1.1 million head (-1% on the year)
> Sheep & lambs = 8.8 million head (+1% on the year)
> Pigs = 28,050 head (+1% on the year)

Source: 'Survey of agriculture and horticulture, June 2025'

What does this mean for industry?

Latest survey data indicates continued tightening across the UK's red meat herd & flock, with lower breeding numbers and reduced young-stock levels signalling constrained domestic supply ahead. Beef availability is likely to come under pressure as the beef breeding herd reaches new lows, while a smaller lamb crop and reduced sheep numbers point to similarly limited throughput. Although increases in dairy cows and first-time breeding ewes offer some longer-term potential, any improvement in supply is expected to be gradual.

CATTLE

Prices – week ending 13th December

The average deadweight prices in England and Wales for steers stood at **651.5p/kg**. This was:

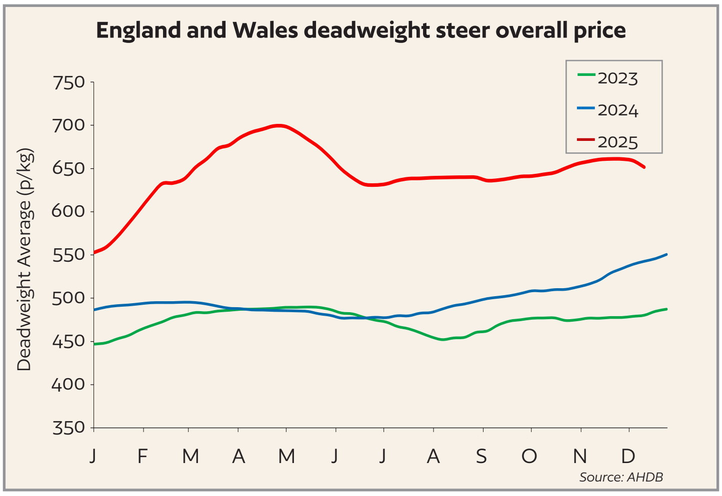
- - 7.5p on the previous week,
- 108.7p above year-earlier levels.

The deadweight prices for other cattle categories were as follows:

- Heifers: 646.8p/kg (- 6.6p on the week),
- Young bulls: 634.5p/kg (- 5.2p on the week), and
- Cull cows: 491.5p/kg (- 12.1p on the week).

Throughput – November 2025

- Total cattle throughput at UK abattoirs = 237,200 head – down 4% on the year.
- Total prime cattle throughput = 168,700 head – down 4% on the year.
  - ➢ *steers -5%, heifers -5%, and young bulls +2%*
- Average prime cattle carcase weights = 346.8kg (+9kg on the year).
- Adult cattle throughput = 61,800 head – down 3% on the year.



UK Beef & Veal Production
November '25
78,200 tonnes
-2% y-o-y

SHEEP

Prices – week ending 13th December

The deadweight* lamb price in GB averaged **700.0p/kg**. This was:

- - 13.5p on the previous week
- + 10.1p compared with year-earlier levels,
- 111.8p higher than the 5-year average (2020-24 average: 588.2p/kg).

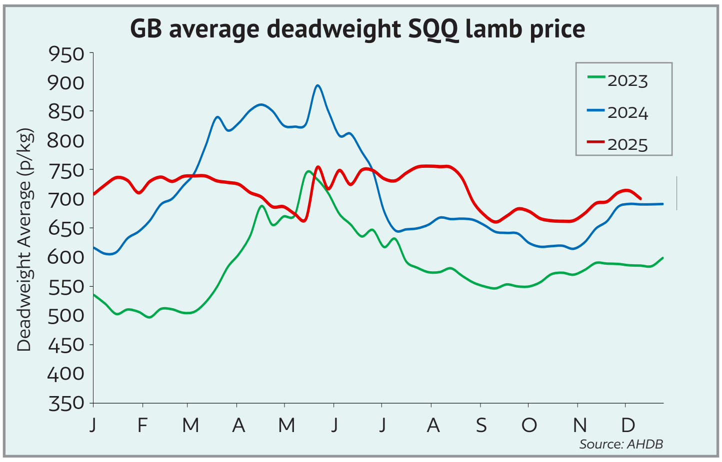
Numbers coming forward reached 42,900 head. This was:

- + 12.5% on the previous week
- - 16% 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 – November 2025

- Total sheep throughput at UK abattoirs = 974,500 head – down 14% on the year.
- Lamb throughput = 886,300 head – down 13% on the year.
- Average lamb carcase weights = 20.4kg (+0.5kg on the year).
- Cull ewe and ram throughput = 88,200 head – down 15% on the year.



UK Sheep Meat Production
November '25
20,400 tonnes
-12% y-o-y

PIGS

Prices – week ending 13th December

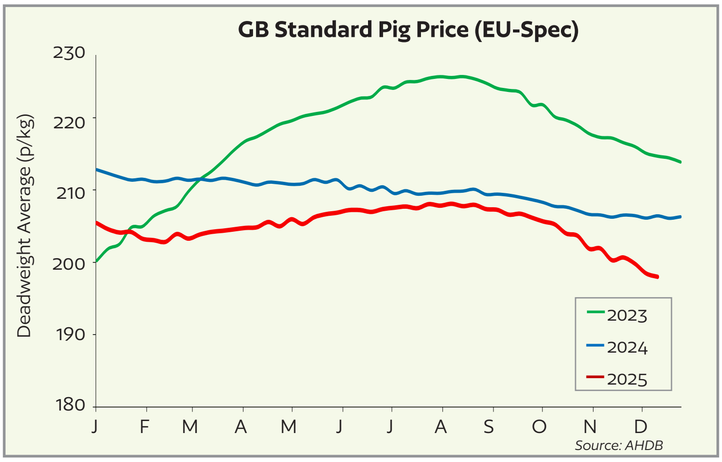
The EU-spec Standard Pig Price (SPP)* in GB stood at **198.0p/kg**. This was:

- - 0.4p on the previous week,
- - 8.4p compared with year-earlier levels,
- 15.6p higher than the 5-year average (2020-24 average: 182.4p/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 – November 2025

- Total pig throughput at UK abattoirs = 983,800 head – down 1% on the year.
- Clean pig throughput = 867,000 head – down 1% on the year.
- Average clean pig carcase weights = 92.5kg (+2.4kg on the year)
- Sow and boar throughput = 16,900 head – up 1% on the year.



UK Pork Production
November '25
82,800 tonnes
+1% y-o-y