Hybu Cig Cymru
Meat Promotion Wales

HCC Market Bulletin

January 2026

> This month's Market Bulletin takes a look at slaughter and production trends for 2025 as a whole following the recently released throughput figures from Defra.
>
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CATTLE

Total cattle throughput at UK abattoirs fell to **2.7 million head** in 2025, down 5% (or 130,200 head) year-on-year, and 3% below the 2020–24 average of 2.8 million head. This marks the lowest annual throughput since 2015, and confirming a continued tightening in cattle availability.

All categories of cattle recorded a year-on-year decrease in slaughter levels. Prime cattle throughput declined to around 2.0 million head, a 4% year-on-year fall, driven by reductions across all prime categories. Steers recorded the largest year-on-year decrease, with slaughter numbers falling to just under 1.0 million head, down almost 60,000 head year-on-year, reaching its lowest level since 2014, reflecting both reduced cattle numbers and ongoing structural changes in finishing systems. Heifer throughput declined by around 3% to 828,000 head, but volumes remain historically elevated compared to longer-term historical levels, suggesting that heifers continue to play a dual role in both beef supply and herd replacement decisions. Alongside this, adult cattle throughput fell by 4% on the year to approximately 614,000 head, the lowest level since 2014. Cow slaughter declined year-on-year, suggesting fewer breeding females are being removed from the herd, which could potentially reflect producer caution in response to tight cattle supplies, replacement costs, and longer-term uncertainty.

Reduced slaughter volumes have contributed to lower domestic beef production, with volumes reaching **893,800 tonnes**, down 4% year-on-year, and 3% below the five-year average. Ongoing supply constraints are likely to continue supporting firm cattle prices, whilst constrained domestic production volumes may elevate import requirements, increasing exposure to global beef market conditions and currency movements. Looking to 2026; the potential supply of cattle in the UK will likely remain tight, as herd rebuilding will depend on producer confidence, profitability, and policy clarity.

SHEEP

Total sheep and lamb slaughter in the UK declined to approximately **12.5 million head** in 2025. This represents a fall of around 2% compared with 2024, and places throughput around 9% below the 2020-24 average, reinforcing the longer-term contraction in UK sheep numbers.

Lamb throughput accounted for the majority (around 90%) of slaughter at around 11.2 million head – a decrease of 2% (or 188,100 head) on the year. This extends the gradual decline seen since the post-pandemic peak and suggests that lower breeding ewe numbers are increasingly influencing finished lamb availability. Notably, current lamb throughput levels are similar to those recorded during the foot and mouth disease year of 2001, highlighting the extent of supply tightening, albeit driven by structural change rather than disease-related disruption. The reduced lamb crop will likely impact the breeding flock's future size. Adult sheep throughput fell by around 8% year-on-year to approximately 1.3 million head, the lowest level since the early 1980's. Despite lower slaughter numbers, total sheep meat production in 2025 stood at **265,700 tonnes**, just 0.2% lower than in 2024, largely reflecting higher average carcase weights which offset the decline in throughput.

Looking at the lamb crop year (May '25 and April '26); lamb throughput between May and December was 7.5 million head – 3% below 2024 levels. A reduction in the breeding flock and lower lamb numbers were confirmed by the Defra June 2025 survey data, showing the lamb crop size being at a historically low level, therefore suggesting supply will likely remain constrained moving forward.

PIGS

UK abattoirs processed **10.6 million** pigs in 2025 – a 1% year-on-year increase, but 3% below the 2020-24 average. Clean pig throughput stood at 10.4 million, while 197,500 sows and boars were processed. Pigmeat production totalled **975,200 tonnes**, up 2% from 2024 but 1% below the five-year average of 987,800 tonnes.

2025 THROUGHPUT DATA FOR WALES:

> Cattle & calves = 176,000 head (-7% on the year)
> Sheep & lambs = 2.0m head (+3% on the year)
> Pigs = 20,700 head (-4% on the year)

Source: Defra

It must be noted that the monthly throughput figures provided by Defra are provisional, and may be revised at a later date.

What does this mean for industry?

Tightening cattle and sheep supplies are likely to continue supporting firm prices into 2026. However, reduced domestic availability may increase reliance on imports, exposing the supply chain to global market and currency volatility. Longer-term recovery will depend on producer confidence, profitability and policy clarity.

Monthly Market Round-Up

CATTLE

Prices – week ending 25th January

The average deadweight prices in England and Wales for steers stood at **641.4p/kg**. This was:

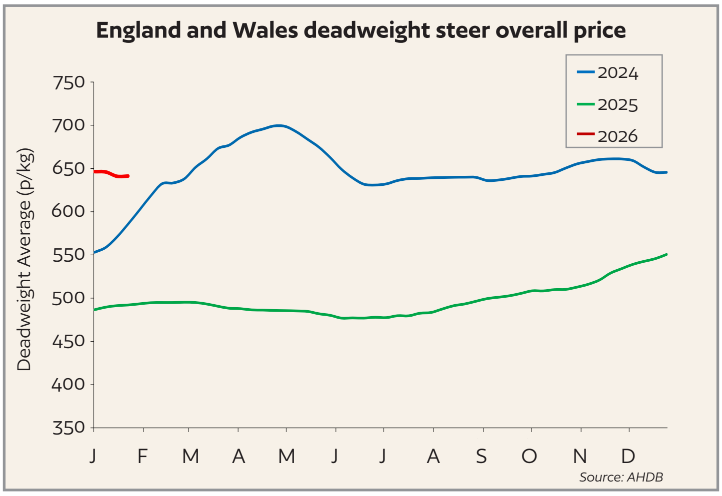
- + 0.3p on the previous week,
- 55.5p above year-earlier levels.

The deadweight prices for other cattle categories were as follows:

- Heifers: 636.7p/kg (-2.5p on the week),
- Young bulls: 622.8p/kg (-3.6p on the week), and
- Cull cows: 505.0p/kg (+5.7p on the week).

Throughput – December 2025

- Total cattle throughput at UK abattoirs = 216,300 head – up 1% on the year.
- Total prime cattle throughput = 156,700 head – down 1% on the year.
  - ➢ *steers -0.4%, heifers -2%, and young bulls +11%*
- Average prime cattle carcase weights = 348.7kg (+9kg on the year).
- Adult cattle throughput = 54,200 head – up 3% on the year.



UK Beef & Veal Production December '25

71,100 tonnes

+2% y-o-y

SHEEP

Prices – week ending 25th January

The deadweight* lamb price in GB averaged **688.4p/kg**. This was:

- - 25.2p on the previous week
- - 42.8p compared with year-earlier levels,
- 81.8p higher than the 5-year average (2020-24 average: 606.6p/kg).

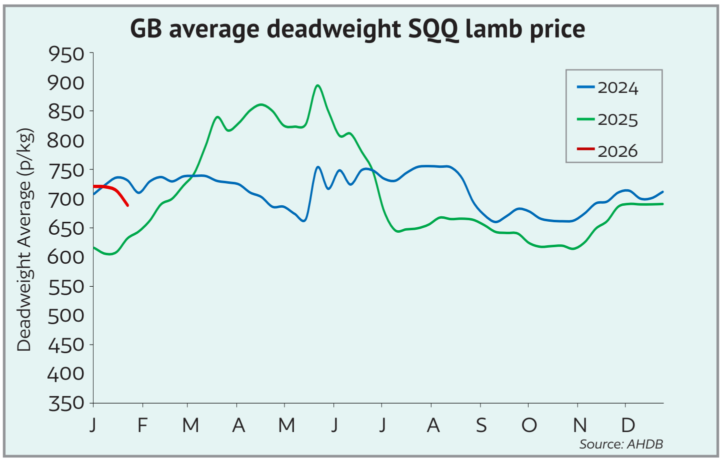
Numbers coming forward reached 25,900 head. This was:

- - 12% on the previous week
- - 24% 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 – December 2025

- Total sheep throughput at UK abattoirs = 1.2 million head – down 5% on the year.
- Lamb throughput = 1.1 million head – down 4% on the year.
- Average lamb carcase weights = 20.9kg (+1.3kg on the year).
- Cull ewe and ram throughput = 104,300 head – down 11% on the year.



UK Sheep Meat Production December '25

25,200 tonnes

+0.4% y-o-y

PIGS

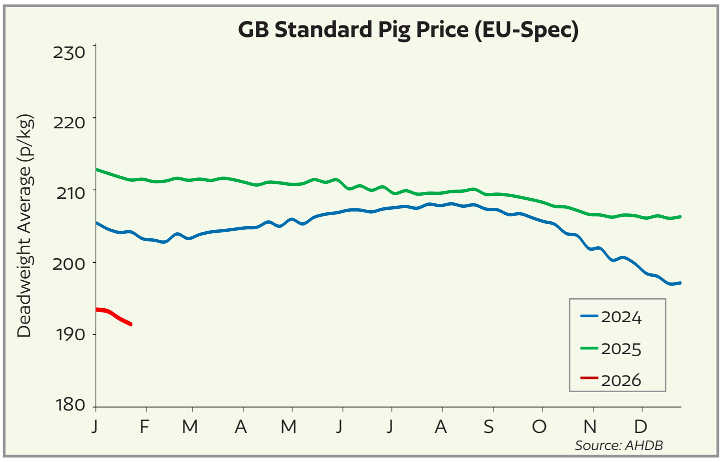
Prices – week ending 25th January

The EU-spec Standard Pig Price (SPP)* in GB stood at **191.4p/kg**. This was:

- - 0.8p on the previous week,
- - 12.8p compared with year-earlier levels,
- 32.3p higher than the 5-year average (2020-24 average: 171.8p/kg).

Throughput – December 2025

- Total pig throughput at UK abattoirs = 888,300 head – up 3% on the year.
- Clean pig throughput = 872,300 head – up 2% on the year.
- Average clean pig carcase weights = 91.7kg (+3.2kg on the year)
- Sow and boar throughput = 15,900 head – up 23% on the year.



UK Pork Production December '25

82,400 tonnes

+7% y-o-y