

“ The latest cattle population data highlights continued contraction in the breeding herd, with modest improvements in younger cattle numbers offering some support to future supply. This month’s Market Bulletin examines trends seen in the recently released data from the British Cattle Movement Service (BCMS) in more detail. ”

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CATTLE POPULATION OVERVIEW

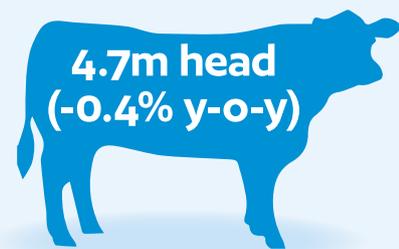
As of 1 January 2026, the total cattle and calf population in Great Britain stood at 7.4 million head, representing a year-on-year decline of almost 1% (around 70,000 head), and a 4% decrease compared to January 2024. This continued contraction reflects ongoing structural changes within the sector. Beef cattle numbers fell by 0.4% to 4.8 million head, while the dairy herd declined more sharply, down 1.8% to 2.6 million head, maintaining the downward trajectory seen in recent years.

Looking more closely at the breeding herd, the population of cattle aged over 30 months stood at 2.7 million head, down 1.9% year-on-year and 7% lower than in 2024. Within this, breeding females over 30 months – a key indicator of future production capacity – declined by 1.7% to 2.6 million head. This was largely driven by a 2% reduction in the beef breeding herd to 1.2 million head, while the dairy breeding herd fell by a more modest 1% to 1.4 million head. The continued contraction in breeding animals reinforces expectations of tighter supply in the medium term, particularly from the suckler herd.

PRIME CATTLE SUPPLY

Younger cattle data provides further insight into supply prospects. The population of cattle under 30 months fell marginally by 0.4% (almost 18,500 head) to 4.7 million head. Within this, beef cattle and dairy males aged 12-30 months – a key indicator of prime cattle availability in the near term – were down 1% compared to January 2025. At 1.7 million head, this is the lowest level since January 2022, suggesting that short-term availability of finished cattle may be slightly lower than in recent years, although some animals may be retained for breeding purposes.

Cattle aged under
30 months in GB =



Further down the pipeline, the population of beef cattle and dairy males aged 0-12 months increased by 1% year-on-year to 1.9 million head - the highest level since January 2023. Growth within this category, including a 1% rise in beef animals, indicates a modest uplift in future supply. However, despite this improvement, overall cattle numbers remain historically tight, and this is likely to underpin supply constraints further ahead.

CALF REGISTRATIONS AND PRODUCTION TRENDS

Recent calf registration data helps to explain some of these trends. Overall registrations in 2025 saw a slight increase on the year, with growth largely driven by calves born to dairy dams. The continued expansion of dairy-beef production remains a key feature, with around 60% of dairy-bred calves sired by beef bulls, reflecting widespread use of sexed dairy semen alongside beef sires. This shift is supporting the increase in younger cattle numbers (0-12 months) seen in the population data. In contrast, suckler calf registrations continued to decline, although the rate of contraction has eased compared to previous years. This points to a slowing in the pace of structural decline rather than a reversal. While growth in dairy-beef is helping to offset some of the reduction in suckler output, it is not fully compensating for the longer-term contraction in the beef breeding herd.

Despite the tighter supply outlook, demand-side pressures remain an important counterbalance. Domestic beef demand continues to weigh on the market, tempering farmgate price growth. GB retail data for the 12 weeks ending 22 February showed a near 7% decline in total beef volumes purchased, with mince seeing the largest drop, driven by both fewer shoppers and lower volumes per trip. Consumer confidence and its impact on spending behaviour will be a key watchpoint in the coming weeks, particularly as higher retail prices continue to influence purchasing decisions.

What does this mean for industry?

Tightening breeding herd numbers continue to point towards constrained cattle supplies in the medium term, despite some improvement in younger stock driven by dairy-beef production. While this may lend underlying support to prices, weaker consumer demand remains a key factor. Market direction will depend on whether reduced supply can outweigh demand pressures, with producer confidence and retention decisions playing a crucial role in shaping future availability.

Monthly Market Round-Up

CATTLE

Prices – week ending 21st March

The average deadweight prices in England and Wales for steers stood at **632.4p/kg**. This was:

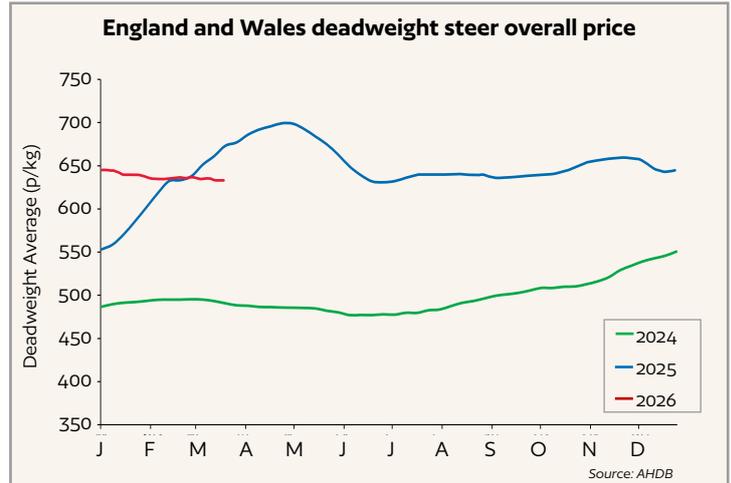
- -2.0p on the previous week,
- 40.7p below year-earlier levels.

The deadweight prices for other cattle categories were as follows -

- Heifers: 632.0p/kg (+1.3p on the week),
- Young bulls: 614.1p/kg (+2.5p on the week), and
- Cull cows: 524.9p/kg (+7.6p on the week).

Throughput – February 2026

- Total cattle throughput at UK abattoirs = 215,600 head – down 2% on the year.
- Total prime cattle throughput = 161,600 head – down 2% on the year.
 - steers -2%, heifers -3%, and young bulls +7%
- Average prime cattle carcass weights = 353.6kg (+10kg on the year).
- Adult cattle throughput = 48,600 head – down 4% on the year.



SHEEP

Prices – week ending 21st March

The deadweight* lamb price in GB averaged **837.5p/kg**. This was:

- +37.8p on the previous week
- +107.0p compared with year-earlier levels,
- 172.9p higher than the 5-year average (2021-25 average: 664.6p/kg).

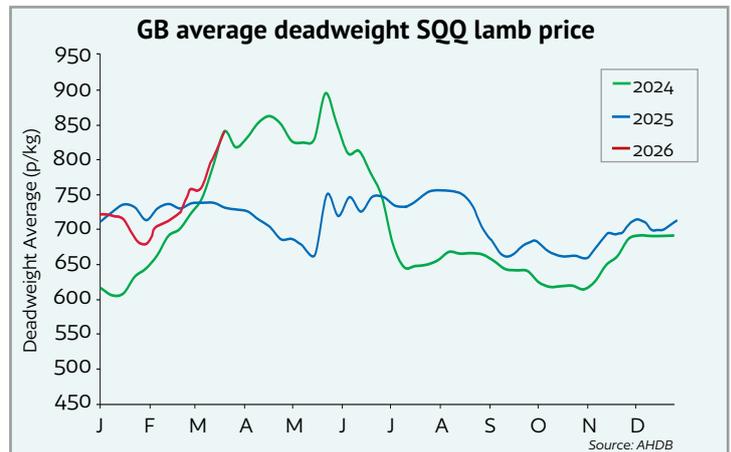
Numbers coming forward reached 43,400 head. This was:

- +11% on the previous week
- +50% 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 – February 2026

- Total sheep throughput at UK abattoirs = 1.1 million head – up 8% on the year.
- Lamb throughput = 949,600 head – up 8% on the year.
- Average lamb carcass weights = 21.0kg (+ 0.6kg on the year).
- Cull ewe and ram throughput = 109,400 head – up 2% on the year.



PIGS

Prices – week ending 21st March

The EU-spec Standard Pig Price (SPP)* in GB stood at **182.7p/kg**.

This was:

- -1.8p on the previous week,
- - 21.6p compared with year-earlier levels,
- 30.4p higher than the 5-year average (2021-25 average: 174.0p/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 – February 2026

- Total pig throughput at UK abattoirs = 861,700 head – up 2% on the year.
- Clean pig throughput = 844,200 head – up 2% on the year.
- Average clean pig carcass weights = 94.3kg (+2.6kg on the year)
- Sow and boar throughput = 17,500 head – up 9% on the year.

