



CHAVEREYS

CHARTERED ACCOUNTANTS & FINANCIAL ALCHEMISTS



Monthly Farming Update

March 2026

Policy issues

1. Apparently with input from the Joint Intelligent Committee, a new National Security Assessment from the UK Government on global biodiversity loss and ecosystem collapse states:
 - ‘The UK’s reliance on imported food and fertilizer makes it vulnerable to supply stocks, price volatility and geopolitical competition for resources’.
 - ‘Critical ecosystems that support major global food production areas and impact global climate, water and weather cycles are the most important for UK national security’.
 - ‘Without significant increases in UK food system and supply chain resilience, it is unlikely the UK would be able to maintain food security if ecosystem collapse drives geopolitical competition for food.’
 - ‘There is a realistic possibility some ecosystems start to collapse by 2030 or sooner as a result of biodiversity loss from land use change, pollution, climate change and other drivers.’
 - ‘Ecosystem collapse would place the UK’s agriculture system under great stress, leaving it struggling to pivot to the new approaches and technologies that would be required to maintain food supply.’
 - ‘The UK does not have enough land to feed its population and rear livestock: a wholesale change in consumer diets would be required. It would also require greater investment in the agri-food sector so that it is capable of innovating in sustainable food production’.

So, now the Government’s own advisers are telling it what the farming community has been saying for so long. But will it take any notice?
2. The Environment, Food and Rural Affairs Committee has reported that a Sanitary and Phytosanitary Agreement with the EU could bring benefits for UK consumers, farmers and producers if it lowers costs by removing the need for border checks and other red tape and makes supply chains more resilient. However, it warned that the UK will potentially have to change regulations in many areas, in particular, the use of pesticides.
3. The Government has published the Nutrient Profiling Model which will be used to restrict the advertising of certain produce items before the 9pm broadcasting watershed. The new methodology will include ‘free sugars’ that are released from fruit and vegetables when they are pureed or mashed. It is claimed that manufacturers would be forced to remove natural products and replace them with artificial sweeteners. This would have an adverse effect on the five-a-day campaign. The proposals have been condemned by the Food and Drink Federation, Mars Food & Nutrition, M&S, Asda and many more.

Reform

1. An outline of Sustainable Farming Initiative 2026 has been published:
 - The number of actions is reduced from 102 to 71.
 - An annual agreement cap has been set at £100,000.
 - Eligibility is set at a minimum of 3 ha.
 - Window 1 will open in June to farms with up to 50ha of agricultural land and farms without an existing Environmental Land Management revenue agreement.
 - Window 1 will close after about 2 months or earlier if the budget is exhausted.
 - Window 2 will open for all farms in September.
 - Each farm business is limited to one SFI26 agreement.
 - The area or value of rotational actions will be limited to those which applied in Year 1.
 - AHW7 Enhanced overwinter stubble will be added to the existing 25 per cent area limit cap, which covers 10 actions, to prevent too much land being taken out of production.
 - The SFI management payment has been abolished.
 - Rate increases have been applied to 3 livestock moorland grazing actions and 2 moorland shepherding livestock actions.
 - Rate reductions will apply to herbal leys, winter bird food and legume fallow actions but only to SFI26 agreements.
 - Actions with a 5-year duration will become 3-year actions in SFI26.
 - Supplemental actions must be applied for at the same time as the relevant base action.
2. Defra has announced that a new round of Environmental Land Management Capital Grants will open in July with £225 millions available.
3. The application window for the next round of the Farming Equipment and Technology Fund will open on 17 March. A total of £50 millions is available apportioned as to £20 millions for farm productivity, £20 millions for animal health and welfare and £10 millions for slurry management. Grants range from £1,000 to £25,000 per theme.

Grants/regulations/legislation/environment

1. A report Green your eats, by the Resolution Foundation, has revealed that agriculture is the only major sector where carbon emissions have barely fallen in the past 15 years. However, the report also advised that, with Government participation in low-carbon farming, the cost increase to food prices would be less than 1 per cent or an addition of 50p to the average weekly shop.

2. An environmental baselining pilot led by AHDB, with input from Quality Meat Scotland, has revealed that 14 per cent of farms analysed were already beyond net zero with over 50 per cent of those managing livestock. The amount of carbon found in the soil, with samples taken up to one metre deep, averaged 126 tonnes per hectare. 95 per cent of carbon stocks on analysed farms were held in the soil with the balance in trees and hedges.
3. According to the Met Office, rainfall in the UK in January was 17 per cent above the long-term meteorological average, while Northern Ireland was 70 per cent above average, the second wettest since records began in 1836, only surpassed by January 1877.
4. Leaf has launched Regen Academy, an online resource to help farmers explore regenerative practices which work for their businesses.
5. A 3-year collaboration has been announced between Leaf, Cambridge University and Hutchinsons to explore the use of artificial intelligence in regenerative agriculture.
6. Defra has announced a package of measures to reduce the impact of deer on the environment:
 - A team of dedicated deer officers will be established to support effective deer management activity.
 - Grant funding will be made available.
 - Licensing processes will be streamlined.
 - Changes will be made to allow night shooting and close season shooting to provide better protection for crops, timber and habitats where there is a clear need.
 - Support will be provided to the wild venison market.
7. With the grey squirrel population in Great Britain having reached an estimated 2.7 million animals whereas the English population of red squirrels is estimated to be only 38,900, the economic cost of grey squirrel damage to woodlands in England and Wales is estimated to be £37 millions annually. As a consequence, Defra has issued an update to the 2014 Grey Squirrel Action Plan. Actions to be taken over the ensuing 5 years include:
 - Encouraging landowners to take greater action through financial incentives and advice.
 - Supporting conservation volunteers and landowners by leading communication on the impacts of grey squirrels and providing support for training in grey squirrel management.
 - Supporting research into novel forms of population management.

8. A study conducted by Cranfield University, and published in *Agricultural Water Management*, has analysed greenhouse gas emissions and blue water scarcity by impacts across the UK apple supply chain. The findings reveal that British apples have a negligible blue water scarcity footprint due to predominantly rain-fed production whereas many overseas apples have irrigation requirements in water-stressed locations. Total greenhouse gas emissions per kilogram generated at the orchard production stage of apples are broadly similar for UK, European and Chilean apples with cold storage being the main culprit. However, southern hemisphere apples create higher emission levels especially when maritime shipping is included.
9. The Farming Innovation Programme, in association with Innovate UK, has announced funding for further projects:
 - ‘Sunshine Tomato’, led by John Innes Enterprises, has received funding of £967,797 for precision breeding to create a tomato enriched with provitamin D3.
 - ‘Autotom: Reimagining Tomato Production Through Precision Breeding and Automation’ is led by Cambridge Glasshouse Company and has been awarded £1.76 millions to combine compact precision-bred tomato plants with automated greenhouse systems and conveyor-based harvesting with the aim of reducing labour requirements by 70 per cent and boosting yields to 45-50kg/m²/year.
 - ‘Innovative Faba Bean Feed Ingredients: Enteric Methane Abatement and Feed Carbon Intensity Reduction in English Dairy Systems’ is being run by McArthur Agriculture and has been awarded £1.5 millions. It aims to demonstrate how UK-grown faba bean feed ingredients can reduce emissions from English dairy systems by up to 1.6m tonnes of CO₂e per year, targeting enteric methane using faba bean co-products rich in condensed tannins.
10. The James Hutton Institute has launched Hutton Unearthed, its first public-facing fundraising campaign aimed at accelerating research into climate resilience, sustainable farming, biodiversity recovery and environmental justice.
11. The Environment Agency has announced a new package of surveillance and investigative measures to tackle waste crime:
 - An enhanced 33-strong drone squad will track down illegal dumps from the air.
 - The employment of a new screening tool which enables officers to scan and cross-check lorry licence applications against waste permit records, with suspect operators flagged before they have a chance to move waste illegally.
 - An increase in the Joint Unit for Waste Crime, a 20-strong group of specialists working with law enforcement partners to dismantle organised criminal networks.

12. Defra has published fly-tipping data for England for 2024/25:

- Local authorities dealt with 1.26 million incidents, up 9 per cent.
- 62 per cent of fly-tips involved household waste, the number, 777,000, was an increase of 13 per cent.
- The most common place for fly-tipping was on highways, being 37 per cent of the total, up 9 per cent.
- The most common size category was a ‘small van load’, 31 per cent of the total.
- 4 per cent of incidents were of ‘tipper lorry load’, up 11 per cent. The cost of clearance of these loads was £19.3 millions.
- Local authorities carried out 572,000 enforcement actions, up 8 per cent.
- 69,000 fixed penalty notices were issued, up 9 per cent.
- The total number of court fines fell by 9 per cent to 1,250 with the combined value down 8 per cent to £673,000.

13. Defra has announced additional grant funding:

- A further £70 millions for the Farming Innovation Programme.
- A further £50 millions for the Farming Equipment and Technology Fund.

14. Cardiff-based LED lighting specialist, Bloemteknik, has been awarded £707,000 by Innovate UK to support the continued development of its autonomous lighting platform, GreenFingers, used in greenhouses. GreenFingers continuously analyses canopy-level plant and environmental data to generate productivity and energy-efficient insights, which are applied autonomously through real-time LED control actions.

15. The Scottish Parliament has passed the Natural Environment (Scotland) Bill, designed to halt biodiversity loss and restore nature.

16. The Scottish Government has announced funding of £14.25 millions for the second round of the Future Farm Incentive Scheme and £1 million for the Sea Eagle Management Scheme.

Other matters of farm finance and tenure

- 1.** Defra has awarded a contract valued at £650,000 to the Game and Wildlife Conservation Trust’s Allerton Project to provide Defra employees with a foundation of knowledge about farming. As one farmer said “They definitely are doing things backwards, they need farmers advising them.”
- 2.** Arup, the Open Data Institute, WRAP (Waste and Resources Action Programme), AHDB and HESTIA are to design, develop and test new Data Sharing Infrastructure and governance model for the UK’s agri-food supply chain. The Arup-led consortium aims to better measure and communicate environmental impacts of the Government’s Food Strategy and the Environmental Improvement Plan. It is hoped the consortium will demonstrate how data sharing infrastructure can improve the way environmental impacts are monitored, reported and verified across the sector.

3. Under the auspices of Defra, the Commissioner for the Tenant Farming Sector in England has launched a survey to gather views on awareness of his role and the Agricultural Landlord and Tenant Code of Practice. The survey closes on 6 March.
4. Cranfield University has reached agreement with Defra to make the National Soil Map of England and Wales free and open access.
5. Defra has published data on farm rents in England in 2024/25:
 - The average annual rent for Full Agricultural Tenancy agreements fell by 6 per cent to £174 per hectare. Adjusted for inflation, the fall was 10 per cent.
 - The average annual rent for Farm Business Tenancy agreements rose by 4 per cent to £230 per hectare but there was no movement in real terms.
 - The average rent for seasonal agreements rose by 2 per cent to £166 per hectare but fell by 2 per cent in real terms.
6. The 1908 Group has been launched, comprising Acorus, PWA Planning and Woolfe Bond Planning, leading names in planning and consultancy particularly in agriculture. All three enterprises are owned by the National Farmers Union of England and Wales and the new name marks the formation of the NFU.
7. The Agricultural Price Index for December shows falls for outputs of 0.9 per cent, compared to a year ago, and 2.4 per cent compared to November. The index for inputs rose by 2 per cent, compared to a year ago, but was down 0.3 per cent on November.
8. Research undertaken by TWM Solicitors has revealed that Inheritance Tax investigations in 2025 reached almost 4,000 with additional tax of £246 millions being raised.
9. Having announced on 13 January that shooting and deer forest businesses in Scotland would no longer be eligible for the Small Business Bonus rates relief system, the Scottish Government has confirmed that properties with a rateable value of up to £20,000 would be eligible for graded sporting reliefs with an exception if the venison entered the food chain.

Product prices

A. Market background

1. Sterling weakened against the Euro and the US Dollar this month - the Euro movement being more linear whilst the change against the Dollar being more volatile. Opening the month at 86.5p per Euro, Sterling peaked early at 86.1p, then fell for most of the month to hit a low of 87.8p before a marginal improvement led to a close at 87.6p per € (1.1p weaker). Against the US Dollar it was a similar picture, with Sterling opening at 73.0p per \$ and, after a very small improvement to 72.8p, it fell to 74.0p, recovered to 72.9p and fell again to close the month at 74.2p per \$ (1.2p weaker).

2. The gold price, having fallen from its all-time peak, significantly, in the final days of January, continued to fall in the early days of February before climbing for the rest of month. Opening at £3,591 per troy ounce, the price dropped to £3,362 before gaining back all the loss and more over the rest of the month to close at £3,981 (up £390).
3. Crude oil prices closed up, having first fallen below its opening price. Brent Crude opened at \$69.32 per barrel and after falling to a low of \$66.30 it climbed, with some volatility mixed in, for the rest of the month to peak at its closing average price of \$72.87 per barrel, up \$3.55 overall and the highest average since June 2025.

B. Crops

1. The cereals market closed broadly unchanged, with various competing factors all but cancelling each other out. Concerns over the ongoing cold weather in the US and Europe has moved from 'hampering development' to concerns over levels of winterkill; the result of sustained sub-zero temperatures, with variable snow cover to insulate, will become evident as Spring progresses. All this, countered by high stock levels rolling into the season. At the very end of the month, escalating US / Iran tension led to volatility; expected to increase over coming months. Sterling's weakness against both US dollar and Euro also helped to prop up prices. Milling wheat premiums remain below £10/tonne although there is now possible upside potential over the horizon. Feed wheat futures closed up, particularly in the medium term; by late February, deliveries for November 2026, and 2027 were £175/tonne (+4) and £182/tonne (+1) respectively. Oilseed rape prices closed significantly up, driven by the combination of the rising crude oil price, concerns over the 2026 crop, possible changes in US biofuel mandates, the global soyabean market and a weakened Sterling.

Average spot prices in late February (per tonne ex-farm): feed wheat £163 (-); milling wheat £172 (+1); feed barley £152 (-); oilseed rape £431 (+21); feed peas £206 (-3); feed beans £206 (+1).

C. Livestock

1. The average live-weight cattle prices for steers and heifers both closed higher by a moderate margin. The average steer price, from its opening average of 360p/kg lw, peaked at 368p/kg early in the month, then fell back before a partial recovery saw it close the month at 367p/kg lw (up 7p to sit 7p/kg above the average a year earlier). The average finished heifer price improved in a more linear fashion; opening at 373p/kg it climbed steadily over the course of the month, with a brief mid-month pause, to a closing average of 386p/kg (up 13p to sit 19p above the average a year earlier). The average dairy cow price fell back early on but soon improved with a material jump in the final week. From an opening position of £1,669 it fell to £1,588 then climbed to £1,791 where it settled for much of the month before jumping in the final days to a closing average of £2,082 per head (up £413 to sit £408 below the prior year average).

2. The average finished lamb price (SQQ liveweight, old season) bounced back from the fall in January, climbing sharply at either end of the month, and steadily otherwise. From an opening average of 325p/kg, it jumped to 344p/kg early on then climbed more steadily to 350p/kg in late February before a final surge to close the month at 369p/kg (up 44p, sitting 24p/kg above the average a year earlier).
3. The average UK standard pig price (SPP deadweight) continued to fall throughout the month. From an opening position of 191.4p/kg dw, it fell to a closing position of 186.5p/kg (down 4.9p/kg overall, 17.4p/kg below the previous year).
4. Partly due to limited responses from producers in recent months, the UK all milk price for December remains the most recently reported average, having fallen 2.62ppl to 40.29ppl, sitting 6.19ppl below a year earlier and on a par with the rolling 5-year average. The EU average milk price for December fell a further 2.50ppl to 43.38ppl, to sit 3.23ppl below the price a year earlier.

Other crop news

1. The conference From Soya to Sustainability has revealed that a combination of science, applied research, farmer-led trials and growing supply chain engagement has created conditions for a major shift towards domestic pulse production. The livestock industry's reliance on imported soya is having a major impact on UK agriculture's carbon footprint thereby creating an opportunity for UK growers. The Anderson Centre has reported that 1.6 million tonnes of beans would be needed to replace 50 per cent of the soya currently used in livestock feed.
2. A nationwide poll by the Nature Friendly Farming Network has revealed that 90 per cent of respondents consider that there are clear benefits from growing fruit, vegetables and pulses including improved resilience through diversification, healthier soils and more varied income streams rather than relying wholly on cereals. However, only 38 per cent of respondents have already diversified while 29 per cent reported the matter was under consideration. About 50 per cent of non-growers claimed unsuitable soils or a lack of technical expertise as reasons for not doing so.
3. Niab and the United Kingdom Cereal Virulence Pathogen Survey have revealed that the widespread planting of winter wheat varieties carrying the yellow rust major resistance gene Yr15 is likely to have encouraged the emergence of new virulent strains of the disease.

4. In partnership with the University of Leeds, McCain Foods is to launch a new Farm of the Future in North Yorkshire following the establishment of similar farms in Canada and South Africa. The farm is designed to help accelerate the adoption of regenerative practices in real-world conditions. The 202-hectare site will adopt practices such as controlled traffic farming, year-round soil cover and biodiversity building. It will pilot a circular nutrient system, developed in partnership with the University of Leeds National Pig Centre, using pig manure to enrich soils, reduce waste and demonstrate how mixed farming systems aim to improve soil health and biodiversity while helping to lower greenhouse gas emissions.
5. The Agricultural Price Index shows an increase of 22.5 per cent for forage plants, compared to a year ago, but falls of 9.3 per cent for wheat, 5.4 per cent for barley, 20.2 per cent for oats, 1.9 per cent for potatoes, 3.9 per cent for oilseed rape, 0.2 per cent for fresh vegetables and 5 per cent for fresh fruit. Compared to November, there were increases of 2.3 per cent for barley, 2.1 per cent for potatoes, 1.8 per cent for forage plants and 0.2 per cent for fresh vegetables but falls of 1.1 per cent for wheat, 3.1 per cent for oats, 2.3 per cent for oilseed rape and 15.9 per cent for fresh fruit.
6. Scientists at Northwest A&F University in Yangling, China have reviewed research on breeding crops to improve yield and biomass, breeding for below-ground crop traits has been ‘largely untapped.’ Genes that could be targeted for high-tech breeding approaches producing longer roots have been found in wheat, rice and maize while plant cultivators have been created which release different levels of compounds which help fix carbon.
7. LettUs Grow is to participate in QuBOOSTR, a £2.4 millions precision breeding project involving QuberTech and the John Innes Centre. The project aims to domesticate dandelions, a plant that naturally produces latex in its root systems, a sustainable source of rubber for the UK.
8. Defra has released data on bioenergy crops in 2024:
 - 142,000ha of agricultural land in the UK were used to grow crops for bioenergy, 2.3 per cent of all arable land.
 - 30 per cent of land used for bioenergy was for biofuel (biodiesel and bioethanol) for the road transport market with the remainder used for heat and power production.
 - 148 million litres of biofuel was produced mainly from wheat and sugar beet.
9. The British Pea & Bean Conference will be held on 11 November at Jakemans Community Stadium in Boston.

Other livestock news

1. The latest Dairy Antimicrobial Focus report from Kingshay, using 2024/25 data from 967 dairy herds and 136 vet practices across the UK, has revealed that the average total antimicrobial usage has fallen to 12.2mg/kg Population Corrected Unit, down from 12.7mg/kg PCU in 2023/24 and 15.7mg/kg PCU in 2020.
2. A study published in Animal Journal has suggested that the inclusion of rapeseed cake or oil in the diet of cattle can reduce enteric methane with no negative metabolic effects or effects on rumen fermentation or the fatty acid composition of *M.longissimus doris*.
3. NMR has introduced a genomic testing service for cross-bred herds as part of its GeneEze service as a result of AHDB's access to female genotypes from cross-bred cows.
4. There have been outbreaks of BTV-3 bluetongue disease in Staffordshire, Devon, Oxfordshire, Cumbria, Buckinghamshire, Somerset, Cheshire, Derbyshire, Shropshire and Wales.
5. The Home Office has refused to continue the concession to allow overseas sheep shearers to enter the UK without a visa.
6. During January, with comparisons to a year earlier:
 - UK prime cattle slaughterings fell by 3.7 per cent to 163,000 head.
 - Beef and veal production fell by 0.8 per cent to 876,000 head.
 - Mutton and lamb production rose by 0.5 per cent to 21,000 tonnes.
 - Pig slaughterings fell by 31 per cent to 872,000 head.
 - Pigmeat production rose by 0.1 per cent to 85,000 tonnes.
7. A new report, Welsh Suckler Beef Production: Addressing Decline and Securing a Sustainable Future, has revealed that the number of herds fell by nearly 40 per cent between 2004 and 2023, down from 10,816 to 6,595, mainly due to high production costs. The report has called on the Welsh Government to provide a targeted suckler herd support package.
8. Muller has reduced its price for Advantage Farmers by 1ppl to 34.5ppl.
9. The UK Dairy Carbon Network is to hold a series of open meetings for dairy farmers to demonstrate ways to improve efficiency and profitability and reduce greenhouse gas emissions:
 - Setting up heifers for a profitable lifetime will take place on 11 March at Two Pools Farm, Iron Action, Bristol.
 - Silage secrets and clamp confessions will be held on 18 March at Sibbersfield Farm, Sibbersfield, Chester.
10. Arla has reduced its price by 1.75ppl to 33.98ppl.
11. A case of foot and mouth disease was confirmed in Cyprus in February.

- 12.** During January, average UK butterfat was unchanged, compared to December, but was up 1.1 per cent on a year ago at 4.45 per cent. Average protein fell by 0.5 per cent, compared to December, but was up 3.3 per cent on a year ago at 3.53 per cent.
- 13.** The Agricultural Price Index for December shows increases of 24.5 per cent for cattle and calves, compared to a year ago, and 3.1 per cent for sheep and lambs, but falls of 4.8 per cent for pigs, 2.2 per cent for poultry, 13.3 per cent for milk and 0.3 per cent for eggs. Compared to November, there was an increase of 2.4 per cent for sheep and lambs but falls of 1.9 per cent for cattle and calves, 1.4 per cent for pigs and 6.1 per cent for milk.
- 14.** AHDB analysis of global pork costs has revealed:
- Over the 5 years to 2024, Italy and Great Britain, which consistently have the highest feed costs, have recorded averages of 1.29p per unit and 1.25p per unit respectively. Contrast that with Brazil where feed costs in 2024 fell to 0.60p per unit.
 - In 2024, Great Britain recorded the highest global breeding costs at 0.07p per unit, Italy's breeding costs were 0.01p per unit, Ukraine, the USA and Brazil were 0.02p per unit.
 - Veterinary and medicine costs were all highest in Austria and Ukraine in 2024, at 0.08p per unit, whereas Brazil and Canada recorded costs of only 0.03p per unit.
 - Energy costs were highest in Ukraine at 0.37p per unit while Brazil recorded costs of 0.01p per unit.
 - Maintenance costs were highest in Germany at 0.08p per unit whereas costs in Hungary, Brazil and Belgium were only 0.01p per unit.
 - Ukraine recorded the highest miscellaneous costs at 0.32p per unit with the lowest costs in Canada and Brazil at 0.01p per unit.
 - In 2024, straw and bedding costs in Great Britain reached 103.9p per pig, 44.8p above those in Sweden, ranked second.
 - Indoor bedding system costs in Great Britain were 48.2p per pig, the third highest, whereas Denmark recorded costs of 5.9p per pig.
- 15.** Hungary has reported 7 outbreaks of Aujeszky's disease in pigs, the first since 2021. France has reported sporadic cases, but is still listed as free of the disease.
- 16.** The full economic cost of production of pork in the last quarter of 2025 has been estimated to be 190p/kg/dw with margins per slaughter pig at £10.32 and 11p/kg/dw. This is a fall of 2p/kg/dw on quarter 3 due to a reduction in feed costs.

17. In the 3 months to December:

- 273 million dozen eggs were produced for human consumption, up 7 per cent on 2024 and 1.6 per cent on the 3 months to September.
- The average farmgate price was 148p per dozen, up 1.2 per cent on 2024 and 0.3 per cent on the September quarter.
- The production of egg products totalled 18,000 tonnes, up 34.5 per cent on 2024 and 6 per cent on the September quarter.

18. Highly pathogenic avian influenza HPAI H5N1 has been reported in commercial poultry in Newark, Nottinghamshire (2); Newington, Kent (3); Mundford, Norfolk (2); Gainsborough, Lincolnshire (3); York, Yorkshire (3); Dereham, Norfolk (3); Welton, Lincolnshire; Sudbrooke, Lincolnshire; Ely, Cambridgeshire; Market Rasen, Lincolnshire; Tewkesbury, Gloucestershire; Swaffham, Norfolk (2); Dalton-in-Furness, Cumbria; Alderley Edge, Cheshire; Alvechurch, Worcestershire; and in captive birds in Grassington, North Yorkshire; Needham Market, Suffolk; Chedburgh, Suffolk; and Ancroft, Northumberland.

19. During January, with comparisons to a year earlier:

- UK commercial layer chick placings fell by 5.4 per cent to 3.4 million chicks.
- Broiler chick placings rose by 0.1 per cent to 99.8 million chicks.
- Turkey poult placings rose by 25 per cent to 600,000 chicks.
- Broiler slaughterings fell by 2.6 per cent to 96.6 million birds.
- Turkey slaughterings rose by 0.3 per cent to 500,000 birds.
- Total poultry meat production rose by 1.3 per cent to 181,900 tonnes.

VIII Inputs/Supply businesses

- 1.** Defra has released NMPT-GB, an online nutrient management tool. The tool matches nutrient inputs to crop and soil needs.
- 2.** Scientists at the UK Agri-Tech Centre and Rothamsted Research have developed multispectral and fluorescence imaging to detect the grey field slug.
- 3.** The NFU has reached agreement with the Department of Transport and the Carriage of Dangerous Goods Practitioners Forum for agriculture to be exempt from the Carriage of Dangerous Goods regulations. Agriculture-specific guidance for moving products, such as fuel and fertilizer, has been produced.
- 4.** The Agricultural Price Index for December shows a fall of 2.1 per cent for animal feedingstuffs, compared to a year ago, but increases of 0.3 per cent for seeds, 3 per cent for energy and lubricants, 15.4 per cent for fertilizers, 1.9 per cent for chemicals, 3.7 per cent for veterinary services, 3.3 per cent for buildings maintenance and 5.9 per cent for equipment maintenance. Compared to November, there were falls of 0.7 per cent for fertilizers and 1.1 per cent for veterinary services but increases of 0.3 per cent for seeds, 1.2 per cent for energy and lubricants, 0.1 per cent for animal feedingstuffs, 0.1 per cent for buildings maintenance and 0.4 per cent for equipment maintenance.

5. The potato industry has decided not to pursue an Emergency Authorisation for Mancozeb. Discussions with the Health & Safety Executive led to the conclusion that any authorisation would be limited to a single application per crop which would not be commercially viable and would deliver only very limited resistance.
6. Foodservice group Sysco GB has signed an agreement with Shell Energy Europe to harness 20 Gigawatt hours of wind power a year until 2035 sourced from the Race Bank offshore wind farm off North Norfolk.
7. A Duda & Sons and G's Group have announced the joint venture acquisition of Tozer Seeds Ltd.

Marketing

1. With effect from 8 February, the French Government has suspended the importation of any food products from non-EU countries containing residues of any plant protection products not approved in the EU. The French Chamber of Fruits and Vegetables estimates it will affect 56 per cent by volume of fruit and vegetables imported, representing 20 per cent of all fruit and vegetable consumption. The US Department of Agriculture has stated the decree 'has the potential to negatively impact the export to France of \$130 millions of US soybeans, fruit and vegetables as four of the five pesticides targeted by France can be legally used in the US.
2. The IGD has warned that global disruption and geopolitical unease is adding fresh layers of complexity for the food system, impacting both business decision making and consumer confidence. It has urged food and drink businesses to review their supply chain vulnerability and to look for ways to re-shore or near-shore supply. It predicts that food and drink inflation will average 3.8 per cent in 2026, down from 4.2 per cent. It estimates that 30 per cent of shoppers plan to cut grocery spending while 42 per cent expect to reduce spend on eating-out but it is concerned these forecasts may prove to be optimistic.
3. Exports of British farm products to the EU have fallen by almost 40 per cent in the 5 years since Brexit was implemented.
4. According to Nielsen, demand for chilled plant-based food grew by 1 per cent across UK supermarkets in 2025 and is up 1.7 per cent in the past 12 weeks following years of falls. Tesco has reported increased demand for high protein ingredients such as tofu and tempeh, both up by 10 per cent over the past year. It also reported a growing micro-trend focused on whole-food plant proteins including beans, lentils and chickpeas.
5. Morrisons has detailed its £1.6 billions commitment to British farming in the year ahead:
 - It has introduced a shared farming agreement for potato growers that underwrites 100 per cent of the costs of growing to mitigate cost and weather pressures.

- It has launched the Agriculture Directors Forum, bringing together agricultural leaders from key suppliers to strengthen collaboration, align on shared priorities and support the delivery of agricultural strategy, with a focus on innovation, sustainability, animal welfare and long-term resilience.
 - The ‘Morrisons Next Generation Farming Programme’ provides training and development initiatives. So far, over 100 farmers have been through the programme.
 - Along with McDonald’s and the NFU, Morrisons has launched the School of Sustainable Food & Farming at Harper Adams University.
 - It has developed the Sustainable Farm Network which comprises 38 farm networks covering 150,000 ha.
- 6.** Data from AHDB for the 12 weeks to 25 January reveals:
- Volume sales of beef fell by 6.7 per cent with average prices up 17.1 per cent, compared to a year ago. The spend increase was 9.4 per cent.
 - Primary beef volumes fell by 7.3 per cent with mince down 9.9 per cent, processed beef down 4.8 per cent and added value products down 6.7 per cent.
 - Volumes of lamb increased by 1.5 per cent, coupled with a 4.3 per cent price increase, average spend increased by 5.8 per cent.
 - Primary lamb cuts increased by 4.9 per cent, with roasting up 8 per cent, while added value lamb volumes rose by 1.3 per cent but processed lamb volumes fell by 10.3 per cent.
 - Pig meat volumes increased by 0.2 per cent, average prices increased by 1.7 per cent resulting in a spend increase of 1.9 per cent.
 - Primary pig meat volumes increased by 2.8 per cent with mince up 47.6 per cent but processed meat volumes fell by 1 per cent with bacon down 4.6 per cent and sausages down 1.9 per cent.
 - Pork added value volumes increased by 9.1 per cent with sous vide up 21.5 per cent.
- 7.** The Bang in Some Beans campaign, led by The Food Foundation and Veg Power with £1.4 millions of funding from The National Lottery Community Fund, has been boosted by a number of food industry giants participating:
- Angel Hill Foods Co: increase volume sales for all bean products by 25 per cent by 2028.
 - Baxter Storey: double volume sales for all bean products by 2028.
 - Compass Group UK&I: increase the proportion of beans procured by 15 per cent by 2028.
 - Field Doctor: double volume sales for all bean products by 2028.
 - Finnebrogue: double volume sales for all bean products by 2028.
 - Nursery Kitchen: increase volume sales of beans by 75 per cent by 2028.
 - Wahaca: increase volume sales of beans by 10 per cent by 2028.

At present, only 4 per cent of adults are eating enough fibre and the average person consumes only one portion of beans per week.

8. Data from Worldpanel by Numerator shows that own label accounted for 52.2 per cent of grocery spending in the 4 weeks to 25 January, the highest ever recorded. Promotional spending was up 10.9 per cent, compared to a year earlier, the fastest rate of growth since October 2024, whereas full-price sales only grew by 1.7 per cent. Take-home sales grew by 3.8 per cent while like-for-like grocery price inflation fell to 4 per cent, the lowest level since last April.
9. The Office for National Statistics has reported that lamb price inflation was 8 per cent in December, 1 per cent lower than the 3-year average. However, volumes increased by 3.8 per cent with spend up 5.4 per cent. As a result of the high beef prices, shoppers have switched to lamb resulting in the price gap falling from £2.13/kg, at the start of 2025, to £0.59p/kg at the end.
 - Volumes of lamb roasting joints have increased by 12.2 per cent, compared to a year earlier, with a 6.4 per cent increase in spend.
 - Over the Christmas period, due to promotions, volumes rose by 18.3 per cent as a result of a 7.8 per cent drop in price.
 - In the 12 weeks to 28 December, volume sales of lamb leg joints increased by 15.3 per cent with spend up 7.8 per cent.
 - Lamb shoulder joints enjoyed fewer promotions resulting in a volume fall of 8.4 per cent although spend was up 4 per cent.
 - Lamb mince volumes increased by 6.7 per cent with spend up 12.2 per cent.
 - Lamb sous vide volumes increased by 3.8 per cent with spend up 11.8 per cent.
10. During 2025:
 - Dairy exports increased by 9.1 per cent to 1.35Mt, mainly to the EU, with values up 16.6 per cent to £2.2 billions.
 - Volumes of milk and cream increased by 6.2 per cent with values up by £71 millions.
 - Volumes of milk powder grew by 42.7 per cent with annual exports valued at £251 millions.
 - Volumes of whey and whey products grew by 16.6 per cent.
 - Cheese and curd volumes grew by 4.4 per cent with values up 9.3 per cent to £971 millions.
 - Butter volumes increased by 14.3 per cent with values up 27 per cent to £289 millions.
11. The Co-op incubator programme, known as The Apiary, is open for small businesses to apply for the listing of fruit-based snacks and healthy treats. Since 2022, the Co-op has listed 86 new products from 34 suppliers. This year's focus is on health trends such as high protein or healthy snacking. Successful applicants receive support to strengthen their brand and business, including personalised mentoring, targeted masterclasses and supplier peer network.

12. In the 12 weeks to 24 January:

- Cow's milk volumes fell by 1.7 per cent, compared to a year earlier, yet spend increased by 6.7 per cent as a result of an 8.5 per cent increase in average prices. Whole milk volumes increased by 2.6 per cent but other milks saw falls.
- Volumes of cow's cheese increased by 1.6 per cent while spend increased by 4 per cent. Cheddar volumes increased by 0.7 per cent while other types of cow's cheeses increased by 11.3 per cent and snacking by 9.3 per cent.
- Cow's butter volumes fell by 0.6 per cent but spend increased by 3.7 per cent. Block butter volumes increased by 4.7 per cent but spreads fell by 3.2 per cent.
- Cow's cream volumes increased by 0.3 per cent with a 7 per cent spend increase. However, whipping fell by 11.9 per cent, single by 4.4 per cent and sour by 0.1 per cent.
- Volumes of cow's yogurt, yoghurt drinks and fromage frais rose by 5.9 per cent with spend up 10.1 per cent. Plain yoghurt recorded the fastest growth, at 19.56 per cent, with fat-free up 12.9 per cent.

13. The Eat Them To Defeat Them dietary health campaign returns to schools in March with a new creative theme 'Veg Hunters', encouraging children to hunt out, find and eat vegetables. Sponsored by Tilda, new components are 'Eat Them To Defeat Them Schools Challenge' and 'Veg Hunter Champions' for year 5 and 6 pupils. The campaign is sponsored by Sainsbury's and will reach 300,000 pupils at 1,000 schools.

14. During 2025, UK pig meat imports fell by 5 per cent to 752,500 tonnes, the lowest since 2021. Fresh and frozen pork fell by 6 per cent, bacon by 3 per cent, sausages by 3 per cent and offal by 15 per cent. Exports increased by 3 per cent to 306,200 tonnes but the value of exports fell by 5 per cent to £491.6 millions. Exports to China grew by 13 per cent but those to the EU fell by 5 per cent and the Philippines registered a 9 per cent fall.

15. The UK Supreme Court has upheld a ruling in favour of Dairy UK that Oatly is banned from using the term 'Post-Milk Generation' as it includes the word 'milk'.

16. During 2025, UK red meat exports totalled £2 billions, an increase of 12 per cent.

17. YouGov tracking data has revealed that awareness of Red Tractor is at 75 per cent, up 3 per cent since January 2025. The scheme has overtaken the Lion Mark for eggs for the first time.

18. During January, Aldi invested £22 millions in reducing a range of grocery prices.

19. Asda has been fined £507,767 for displaying out-of-date food items at its store in Barnsley, South Yorkshire. Items were found to collectively be 91 days past their use-by date. The prosecution followed a warning in March 2024, Food Standards Officers found 32 out-of-date food items totalling 581 days past their use-by date.

20. Albert Bartlett has launched a limited-edition White Rooster potato bag which will be sold in Sainsbury's stores.

Miscellaneous

1. Farm Underwriting, a specialist insurer for agricultural businesses, has reported that 1 in 10 claims have revealed underinsurance with cover falling short by an average of 40 per cent. Average shortfalls amounted to £11,000 per claim.
2. The latest NFU livestock worrying study has revealed the total cost to be £1.95m in 2025. In the Midlands alone, dog attacks cost £438,000. The study showed that 57 per cent of 1,407 dog owners surveyed allowed their dogs to be off the lead in the countryside, 10 per cent admitted they had no recall while 44 per cent accepted they could not guarantee the dog would return to the owner when called. However, 66 per cent claimed they did not believe their dogs would harm or kill animals, 5 per cent admitted their dogs had chased livestock, 60 per cent considered other dog owners did not treat livestock worrying as a serious issue and 72 per cent did not actively prevent their dogs from chasing livestock.
3. The Agricultural Engineers Association has published details of UK tractor registrations in 2024. Case New Holland overtook John Deere with 3,408 machines, a 28.98 per cent market share. John Deere fell to second with 3,304 machines, a 28.09 per cent market share. All manufacturers, with the exception of Same Deutz-Fahr, recorded reductions compared to 2023 with John Deere down 736, Case New Holland 211 and Valtra down 155. Apart from the top two, Agco-Massey Ferguson sold 1,296 machines, Agco-Fendt 859, Kubota 715, Claas 420, Agco-Valtra 417, SDF 220, JCB 212 and Agri Argo 90.
4. The Office for National Statistics has reported that 47 suicides were registered in England and Wales in the farming and agricultural sector in 2024.
5. The Farm Safety Foundation has launched its annual Mind Your Head Week campaign. It has also collaborated with Baton of Hope to create a farming-themed digital awareness and suicide prevention package. The Royal Foundation is providing funding of £1 million.
6. Red Tractor has introduced updates to its portal which allow members to take live, geo-stamped photographs as compliance evidence. The portal automatically captures location, date and time data.
7. Cambridge University has reversed its decision to close its course in veterinary medicine. The university's General Board has committed to better support the veterinary school but has demanded that improvements are made to both the school's clinical and financial operations. The school has about 160 staff and admits 60 students each year.
8. Applications have opened for the Worshipful Company of Farmers 75th Rural Business Management Court and will close on 30 April.
9. Tom Bradshaw has been re-elected as NFU president.

10. Fruit Focus, which will be held on 8 July this year, is to relocate to Bradbourne House, part of the East Malling estate.

Postscripts

1. Keir Starmer decided he'd start walking to Parliament. Everyday, at the same street corner, he would pass a hooker. He learned to brace himself as he approached her for what was almost certain to follow. "One hundred and fifty pounds!" she'd shout. "No! Five pounds!" he said from the side of his mouth, just to shut her up. This ritual between him and the hooker became a daily occurrence. She'd yell, "One hundred and fifty pounds!" He'd yell back. "Five pounds!" One day, Angela Rayner decided to accompany her boss, and as the couple neared the hooker's corner, he became even more apprehensive than usual. Sure enough, there she stood. He tried to avoid eye contact as she watched the pair pass. Then, the hooker yelled, "See what you get for five pounds...!"

2. A man was looking for a place to sit in a crowded university library.

He asked a girl, "Do you mind if I sit beside you?"

The girl replied, in a loud voice, "NO, I DON'T WANT TO SPEND THE NIGHT WITH YOU!"

All the people in the library started staring at the man, who was deeply embarrassed and moved to another table.

After a couple of minutes, the girl walked quietly to the man's table and said with a laugh: "I study psychology, and I know what a man is thinking; I bet you felt embarrassed, right?"

The man responded in a loud voice: "£800 FOR ONE NIGHT? ... I'M NOT PAYING YOU THAT MUCH!"

All the people in the library looked at the girl in shock.

The man whispered to her: "I study law, and I know how to screw people".

3. Two ladies meet up in heaven.

1st woman: Hi! Wanda.

2nd woman: Hi! Sylvia. How'd you die?

Sylvia: I froze to death.

Wanda: How terrible!

Sylvia: It wasn't so bad. After I quit shaking from the cold, I began to get warm and sleepy and finally died a peaceful death. What about you?

Wanda: I died of a massive heart attack. I suspected that my husband was cheating, so I came home early to catch him in the act. But instead, I found him all by himself in the den watching TV.

Sylvia: So, what happened?

Wanda: I was so sure there was another woman hiding somewhere that I started running all over the house looking. I ran up into the attic and searched, and down into the basement. Then I went through every closet and checked under all the beds. I kept this up until I had looked everywhere, and finally I became so exhausted that I just keeled over with a heart attack and died.

Sylvia: Too bad you didn't look in the freezer – we'd both still be alive.

Look before you leap!

This May, less than two months away, sees the introduction of many of the provisions contained in The Renters' Rights Act 2025. The Act is likely to have a significant impact on farms and rural estates which let residential property.

The objective of the Act is to enhance tenant security and raise the standard of properties. In England, fixed-term assured shorthold tenancies will be abolished as will 'no-fault' evictions. In future, new and existing tenancies will be open-ended periodic assured tenancies.

While 'no-fault' evictions will go, the grounds for possession have been increased and include matters such as rent arrears, anti-social behaviour, the need to occupy the property and the intention to sell, the latter two grounds cannot be used with the first 12 months of a tenancy.

Grounds for possession will include:

- the need for vacant possession where a head tenancy is ending;
- to facilitate the occupation by a 'qualifying agricultural worker to include some contractors';
- to recover tied accommodation after an employee's role has come to an end.

Properties that are subject to formal agricultural tenancies will not be affected.

If a farm worker is to occupy a cottage, it is important that an 'opt-out' notice is served in advance, failure to do so risks the tenancy being an assured agricultural occupancy.

All the above heightens the importance of looking into one's crystal ball and determining whether any potential future events could be affected by today's decision making.

Monthly Farming Update

We welcome feedback on the MFU.
Does this issue raise any questions in your mind?
Would you like more information on a particular item?

Please ring one of our agricultural specialists:

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