



CHAVEREYS

CHARTERED ACCOUNTANTS & FINANCIAL ALCHEMISTS



Monthly Farming Update

August 2026

Policy issues

1. Jeremy Moody, the highly respected secretary of the Central Association of Agricultural Valuers, has reported 'Our government is trying to outsource much of the regulation of farming and the food chain to Brussels where we could have no voice, and to do so overnight next summer. Produce grown here for eating here would be under EU rules.' He further states that crops grown this autumn may be illegal to sell when harvested in 2027 and 'The Andersons Centre has said an overnight switch to EU rules just for crop protection products could cost £500-800 millions in lost yield and husbandry changes. Our focus should be on getting our farming and our economy growing again, rather than simply accepting regulations from others with the added uncertainty as it then changes beyond our control.' When Jeremy speaks, most in the industry listen. Sadly 'most' does not include the present Government.
2. The UK-Switzerland Free Trade Agreement has come into force:
 - British lamb exports will benefit from zero tariffs under the Swiss quota system while beef steaks will have tariffs reduced by 35 per cent.
 - Tariffs on fruit and vegetables will be reduced, falling to 0 per cent on a range of products including peas, carrots and broad beans.
 - English sparkling wine will benefit from a 34 per cent tariff reduction.
3. Does the new Prime Minister care about farming? Well, he says he does, but is he likely to say otherwise? The proof will be forthcoming or not, but we didn't have long to wait – he returned Dame Angela Eagle to Defra but this time as the head. If you missed it first time around, here is the CV of the Defra Secretary:
 - She was born in Bridlington in 1961, so she is older than the average farmer.
 - She was education at Formby High School and studied PPE at St John's College, Oxford.
 - She worked in the economic directorate of the CBI until she was elected MP for Wallasey in 1992.
 - She has no business experience, but, there again, nor has any other Labour MP.
 - She married Maria Exall in 2008.
 - Wallasey sits on the mouth of the River Mersey. It is a built-up area devoid of agricultural land.

So, farming now has politicians representing Wallasey (docks); Portsmouth (docks); Hull (docks) and Coventry. It doesn't augur well!
4. The NFU has joined with the British Retail Consortium, the Food and Drink Federation and UKHospitality in signing an open letter to the Government calling for a five-point plan to strengthen the UK's food supply chain by delivering greater value for the public, procuring a well-negotiated EU realignment, improving planning systems, securing labour, and driving investment and growth.

5. Defra has published the Future of Rural England Report which purports to ‘take a proactive approach and place rural communities at the centre of decision-making.’ The report covers 83 pages but makes no mention of centralising the decision-making resulting in thousands of new homes and solar parks being built on Grade 1 agricultural land much to the annoyance of said rural communities.
6. The Fresh Produce Consortium and foodservice supplier Delifresh have joined forces to launch a nationwide petition urging Britain’s chefs, restaurants and foodservice suppliers to reject the UK-EU Border Reset. To date, over 1,000 chefs and food professionals have signed the ‘One Squeeze Too Farm’ petition.

Reform

1. Defra has announced that the Countryside Stewardship Higher Tier will open to direct applications from farmers and land managers encompassing woodland agreements, agroforestry agreements and new single-focus agreements to restore species-rich grassland. An initial number of agreements in the region of 1,200 will be available.
2. The Farmer Collaboration Fund, with £30 millions available, will open for applications on 1 September and will then close at the end of the month. The fund will be available to collaborative ventures with peer learning, specialist advice, local facilitation and support for new groups.
3. Data has been published on the Farm Investment Fund:
 - By 31 March, 30,200 full applications had been received across four annual rounds with £140.3 millions paid to claimants in respect of the Farming Equipment and Technology Fund.
 - The most funded items were Nipple Drinker Systems, Heat Detection System Ear Tag Collar or Ankle Bands and Rubber Flooring Mats for Cattle.
 - The Large Grants scheme had received 6,800 online applications and 1,550 full applications across 9 themes. Payments totalling £53.4 millions were paid.
 - The areas receiving the most funding were the South West and the North West.
4. The Capital Grants scheme opened on 30 July and Defra has reported that 25 per cent was allocated on the first day.
5. A Farmer Welfare Grant, with £1.5 millions available, will open for applications on 6 August. The scheme will last for 3 years and will support targeted projects that strengthen farmers’ personal and business resilience.
6. Defra has announced that a webinar will be held on 25 August, 10am-12pm, covering information, guidance and the eligibility criteria for the Farmer Collaboration Fund grant. A second webinar will be held on 9 September, 2.30pm-3pm, covering a walkthrough of the application portal.

Grants/regulations/legislation/environment

1. As part of the “Wild Again: Restoring England’s Wildlife” initiative, Natural England is to invest £60 millions in recovering England’s wildlife. Some of the projects, covering over 350 species, are:
 - Recovery of the mole cricket and New Forest cicada
 - Recovering rare fen insects
 - Research into water voles
 - Preventing twite extinction
 - Natterjack toad habitat management
 - Red squirrel conservation
 - Grass snake habitat enhancement
 - Black grouse conservation
 - Smooth snake recovery
 - Cornish adders
 - Barbastelle and bechstein bat survey
 - Reviving rainforests
 - Beaver existence in Kent
 - Turtle dove survey
2. The Nature’s Rights Bill has been introduced in the House of Lords as a private member’s bill. It seeks to recognise nature as “a legal subject and rights-bearing entity and thereby to change the basis on which decisions affecting nature are made. This follows the River Ouse being the first river in England to be formally recognised by a local authority as having rights, subsequently being joined by the River Wye.
3. A review commissioned by Defra and conducted by the Organic Research Centre has reported that organic farming delivers consistent environmental benefits across key indicators such as biodiversity, soil health and reduced chemical use. AI was used to review over 300 peer-reviewed studies and farm-level data. It found organic systems show the strongest evidence of achieving Environmental Improvement Plan goals.
4. The Jersey Royal Company, part of Albert Bartlett, has launched the 2026 Cover Crop Competition. Jersey’s potato growers will be recognised for cover crop mixes that enhance soil health, increase biodiversity and support pollinators and birds between crop seasons. In 2025, a research project across 106 sample sites showed that cover crop fields showed both higher pollinator abundance and higher diversity than control grass fields, in particular:
 - Far higher pollinator numbers and diversity in cover crop fields highlighting the impact
 - All 3 mixes – Bird, Pollinator and Soil Health – delivered positive effects on pollinator populations, reinforcing the importance of diverse mixes tailored to local conditions.
 - Bumblebees, honeybees, butterflies and other groups showed distinct preferences for different flowers and traits.

5. Data has been published on the carbon footprint of the UK and England to 2023:
 - The UK's carbon footprint fell by 4 per cent in 2023 to 699 million tonnes carbon dioxide equivalent (MtCO₂e).
 - Per capita consumption based greenhouse gas emissions in the UK were 10tCO₂e per person, down 5 per cent.
 - While greenhouse gas emissions from goods and services produced and consumed within the UK are down by 49 per cent since 1996, emissions from imports have risen by 43 per cent and now account for more than half the UK's total carbon footprint.
 - Emissions from goods and services imported from China now account for 25 per cent of all imported emissions and 13 per cent of the UK's carbon footprint.
 - England's carbon footprint fell by 3 per cent to 587 MtCO₂e.
 - The UK's carbon dioxide footprint fell by 4 per cent to 548 MtCO₂ while that of England fell by 3 per cent to 461 MtCO₂.
6. Scientists at the University of California, Davis, the US Department of Agriculture and Lawrence Livermore National Laboratory are tracing pesticide movement and accumulation in bee colonies as a result of a number of hives collapsing with worker bees abandoning their hives, leaving the queen behind with her brood of immature bees. The research shows that a honeybee queen facing chronic exposure to pesticides will absorb the contamination and pass it to her eggs. Researchers created 'nano colonies', which represent the inner workings and functions of a hive and colony, with each nano colony containing one queen and 60 worker bees. Initially, worker bees were able to filter out pesticides, but that ability became less efficient as more pesticide accumulated over time. Unlike queens, which could pass on the pesticide to her eggs, worker bees would, in time, become overwhelmed.
7. Following the public furore over the potential culling of Dartmoor ponies, it has been announced that ponies will be removed from stocking rate calculations in new Environmental Management agreements. Pony numbers will also be monitored to ensure they remain stable. A new dedicated pony supplement will be introduced into farming schemes to remove any financial incentive to reduce pony populations. The Dartmoor Land Use Management Group has been asked to develop a whole-moor grazing framework covering all interested parties.
8. According to the National Drought Group, the following areas are officially in drought:
 - Wales
 - East Anglia
 - Hertfordshire and London
 - Thames Valley
 - Hampshire and the Isle of Wight
 - Devon and Cornwall
 - Wessex, including Dorset, Somerset, Wiltshire and South Gloucestershire

Other matters of farm finance and tenure

1. In the 4 weeks to 12 July, grocery price inflation fell to 2.6 per cent, the lowest since December 2024. However, over the past 12 months, the average household spent £5,530 on groceries, up £156 on the previous year.
2. A report published by Barclays – Resilience in the Field: The evolving case for sustainable and regenerative agriculture – has found that 80 per cent of those surveyed have adopted or are planning to adopt regenerative farming practices. Further:
 - 66 per cent identified rising input costs as the biggest threat over the next 12 months.
 - 77 per cent had experienced the effect of changing climatic conditions. Of those, 72 per cent reported drought, 71 per cent greater weather variability and 55 per cent increased rainfall.
 - 65 per cent have already reduced pesticide or herbicide use while a further 14 per cent are planning to do so.
 - 52 per cent have adopted technology to improve efficiency while a further 30 per cent plan to do so.
 - 60 per cent have developed transition plans themselves while only 22 per cent used an independent adviser.
3. New sanitary and phytosanitary arrangements, which came into force on 15 July, may result in plant-regulated goods being unable to travel direct from the UK to Gibraltar as such products are expected to enter through a Border Control Post in an EU member state such as Spain. Rerouting will require businesses to secure phytosanitary certificates and IPAFFS pre-notification, alongside additional documentary requirements, inspections and handling charges. Only 5 days' notice of the change was given.
4. The Food and Nature Resilience Fund has been unveiled by Wildfarmed and Lloyds Banking Group. The fund aims to reward farmers for delivering environmental improvements while continuing to grow food. Severn Trent, Affinity Water and Axa XL have all joined the fund.
5. The Central Association of Agricultural Valuers has released the results of its 49th survey into the letting of land in the year to October 2025:
 - There was a net loss of let land of 4,510 acres.
 - There was a sharp loss in the re-letting of AHA tenancies. Historically, 75-80 per cent have been re-let but this dropped to 52 per cent.
 - The proportion of AHA tenancy land being sold at the end of the tenancy rose from the usual 8-10 per cent to 23 per cent.
 - The average length of Farm Business Tenancies fell from 3.97 years in 2023/24 to 3.38 years in 2024/25, the lowest level since 2021. Excluding tenancies of less than a year, the average fell from 5.05 years to 4.65 years, the lowest since 2018.

- In Scotland, there was a net loss of 10,455 acres. The proportion re-let fell from 75 per cent to 60 per cent while the average length fell from 4.31 years to 3.55 years.
- 6. The Agricultural Price Index for May shows a fall of 4.3 per cent for outputs, compared to a year ago, but an increase of 0.6 per cent compared to April. The index for inputs increased by 6.9 per cent and 0.8 per cent respectively.
- 7. Research by the University of Warwick and commissioned by The Institute of Agriculture and Horticulture has revealed there are 6 priority areas for farmers and growers to develop their skills in order to strengthen their businesses. Expertise must be gained in:
 - Autonomous robots
 - Biological pest controls
 - Carbon and green technologies
 - Remote sensing
 - Big data analytics
 - Precision breedingThe report stresses that skills training must evolve as quickly as the new technologies are introduced.
- 8. Data from Strutt & Parker has revealed that 177 farms were publicly marketed in the first half of the year, compared to 167 in the same period in 2025, and the total was 16 per cent above the 5-year average. However, the acreage involved was 23,675 ha, almost identical to 2025. The average value of arable land sold was £10,500 per acre, 6 per cent down on 2025.
- 9. Data has been published on Farm Household Earnings in 2024/25:
 - On average, primary farm household earnings were £48,400, corresponding to a single adult earning £29,800, with the highest being on general cropping farms at £41,100 and the lowest on lowland grazing livestock farms at £24,300.
 - 73 per cent of farm households had Off-Farm Income.
 - Average Off-Farm Income was £12,500, equivalent to £8,300 for a single adult.
 - Pension income was the most common source of Off-Farm Income at 28 per cent followed by investment income at 26 per cent.
 - The least common income was from green technology at 3 per cent.

Product prices

A. Market background

1. Sterling closed marginally up against the Euro and more significantly up against the US Dollar this month. After opening the month at 86.2p per Euro, Sterling had gained almost 2 per cent by the end of week two (to 84.6p) but fell back to close the month at 85.5p per € (0.7p stronger overall). Against the US Dollar, Sterling opened at 75.5p per \$ and similarly had gained 2 per cent by mid-month (to 73.8p) but then fell back to 75.3 in the remaining weeks before a late recovery to close the month at 74.2p per \$ (up 1.3p).
2. The gold price, whilst remaining volatile held relatively flat overall; opening at £3,046 per troy ounce, the average price peaked several times in the month (the highest being £3,138) and hit a low of £2,951, before closing the month at £3,007 (down £39).
3. Crude oil prices surged again this month as the resolution to the Strait of Hormuz 'issue' appeared to collapse and tensions in Russia escalated again, whilst late month news saw a relaxation. Daily swings were small but the trend for the first three weeks was markedly upwards, whilst the final week was more volatile. Brent Crude opened at \$73.81 per barrel and initially continued to fall to a low of \$71.57, thereafter climbing over \$30 to peak at \$101.87, before a series of falls and recoveries led to a closing average of \$89.83 per barrel, up \$16.02.

B. Crops

1. The cereals market gained significantly throughout most of July but closed on a downward trend. Re-ignition of the conflicts in both the Black Sea region and the Strait of Hormuz brought significant uncertainty to the market, accentuated by speculative traders, however, news was marginally more positive as the month end approached; volatility remains. On the production front, hot and dry weather in Europe has brought cereals harvest early, with light results, and yield prospects for the approaching maize harvest have been lowered. US and South American conditions have improved taking some of the pressure away; meanwhile Sterling's strength against the Euro and the volatile crude oil price only added to the volatility. The milling wheat premium has also been more volatile, reaching as much as £25, but closing at £17 per tonne. Feed wheat futures rose sharply to a crescendo in late July and, despite closing the month lower, were still significantly up overall; by late July, deliveries for November 2026, and 2027 were £200/tonne (+23) and £197/tonne (+9) respectively, with May 2028 deliveries closing the month at £205/tonne (+10). Oilseed rape prices have held, with the strong expectation from the Canadian harvest supported by a buoyant US Soya crop, being countered by domestic expectation and a bold crude oil price.

Average spot prices in late July (per tonne ex-farm): feed wheat £186 (+9); milling wheat £203 (+16); feed barley £165 (+20); oilseed rape £432 (+5); feed peas £206 (+2); feed beans £216 (-15).

C. Livestock

1. The average liveweight cattle prices for steers and heifers both closed marginally up, having been a little higher. The average steer price opened at 341p/kg lw and climbed to 349p/kg mid-month before softening to 347p/kg lw where it closed the month (up 6p to sit 15p/kg below the average a year earlier). The average finished heifer price moved similarly: opening at 352p/kg lw it rose to a mid-month peak of 364p/kg before falling to close the month at 360p/kg (up 8p to sit 14p below the average a year earlier). The average dairy cow price stayed volatile but fell back overall: falling from an opening position of £2,477 to a mid-month low of £1,969 and, after recovering to £2,326, dropping back further to £1,867 per head where it closed the month (down £610 overall to sit £200 above the prior year average).
2. The average finished lamb price (new season SQQ liveweight) fell sharply early on and continued to fall throughout the remainder of the month, as the transition from old to new season continued. From an opening average of 424p/kg, the average price fell to 384p/kg early on, before falling for the remainder of the month to close the month at an average of 352p/kg (down 71p, to sit 7p/kg above the average new season price a year earlier).
3. The average UK standard pig price (SPP deadweight) gained marginally in the month but fell back in the final week. From an opening position of 178.1p/kg dw, it rose to 179.7p/kg but fell back to close the month at an average of 178.3p/kg (up 0.2p/kg overall to sit 29.7p/kg below the previous year).
4. The initial average UK all milk price for May, released in early July, was 34.20ppl, 0.15ppl below the revised April average of 34.35ppl (previously 33.99ppl) - 8.99ppl below the average a year earlier and 6.43ppl below the rolling 5-year average. The EU average milk price for April (38.30ppl, sitting 8.31ppl below the price a year earlier) remains the most recent update.

Other crop news

1. Data has been published on the supply and use of fresh fruit and vegetables in the UK:

Vegetables:

- Home production rose by 8 per cent to 2.622mt.
- Imports fell by 3 per cent to 2.113mt.
- Exports fell by 12 per cent to 66kt.
- Total supply grew by 3 per cent to 4.67mt.
- Supply per inhabitant grew by 3 per cent to 67kg.
- Home production as a percentage of total supply rose by 2 per cent to 56 per cent.

Fruit:

- Home production grew by 2.3 per cent to 577kt.
- Imports grew by 8.2 per cent to 3.569mt.
- Exports grew by 14.7 per cent to 39kt.
- Total supply grew by 7.3 per cent to 4.107mt.
- Supply per inhabitant grew by 7.3 per cent to 59kg.
- Home production as a percentage of total supply fell by 1 per cent to 14 per cent.

2. The first AHDB harvest report, covering up to 27 July has been published:

- 54 per cent of wheat had been harvested; the average yield is 6.8t/ha compared to 7.2t/ha in 2025 and 7.9t/ha for the 10-year average.
- 95 per cent of winter barley was in; the average yield is 6.8t/ha, the same as in 2025 but just below the 10-year average of 6.9t/ha.

3. Légumes de France, the French grower organisation, has warned that the country faces a ‘catastrophic’ situation for many of its vegetable crops. In some crops, up to half of domestic production is likely to be lost with lamb’s lettuce, baby greens, lettuce, carrots, leeks, shallots, garlic and onions all down thousands of tonnes per product.

4. Statistics Netherlands has reported that Dutch production of brown onions from seed has increased to 27,200 hectares, just short of the 2024 record year but the red onion area grown from seed is down 14.7 per cent.

5. Vining pea growers across the Eastern counties have reported a yield fall of almost a third due to drought-like conditions. The UK’s only pea cannery, operated by Princes, has forecast yields of 60 per cent of the norm.

6. The UK’s first precision-bred potato has received marketing notice approval under the UK’s Precision Breeding regulatory framework. Disease-resistant Maris Piper has been developed by the Jonathan Jones Group at The Sainsbury’s Laboratory and has the biological capacity to resist late blight and also Potato Virus Y and Potato Leafroll Virus.

7. A census conducted by Statistics Netherlands has revealed that the Dutch potato planted area has fallen by 8.4 per cent to 150,000 hectares, the lowest figure since 2012. Only seed production increased, by 0.8 per cent to 42,100 hectares.

8. The Agricultural Price Index for May shows increases of 8 per cent for wheat, compared to a year earlier, 14.7 per cent for oilseed rape, 40.4 per cent for forage plants, 3.1 per cent for fresh vegetables and 20.4 per cent for fresh fruit. However, there were falls of 0.9 per cent for barley, 15 per cent for oats and 14.4 per cent for potatoes. Compared to April, there were increases of 4 per cent for wheat, 1 per cent for barley, 0.7 per cent for oats, 9.4 per cent for oilseed rape and 35.2 per cent for fresh fruit but falls of 0.2 per cent for forage plants and 5.6 per cent for fresh vegetables.

9. British Sugar is proposing to cease beet processing at Cantley, Norfolk with effect from February 2027.
10. The World Apple and Pear Association has reported that stocks of apples in European cold stores are up 30 per cent on last year and so competition is becoming fierce. Germany has reported prices as having been below average all season, as low as 50 per cent in many cases.
11. Figures released by GroentenFruit Huis and grower group Nederlandse Fruittelers Organisatie suggest that the Dutch apple crops will be down 18 per cent at 195,000 tonnes, with Elstar down 21 per cent and Jonagold down 20 per cent. However, the pear crop is expected to be 10 per cent up at 393,000 tonnes with Conference up 12 per cent.
12. The British Growers Association has reported that this summer's weather is 'proving to be a disaster' for brassica crops, as well as affecting plantings for winter. Fields of broccoli, cauliflower and cabbage have stopped growing and become dormant, available produce is smaller in size and weight and much is likely to bolt before reaching maturity.
13. The Environment Agency has activated the Trent-Witham-Ancholme River Transfer Scheme whereby water is transferred through a 17.5km pipeline.
14. Suntory Beverage & Food GB&I, the producer of Ribena and Lucozade, is to invest £14.5 millions in a blackcurrant processing facility in partnership with Döhler Group's Herefordshire-based Bevisol Ltd. Suntory is also to invest £200,000 in a 4-year research project on soil health and climate resilience.
15. An ADOPT-funded trial, which is investigating whether surplus renewable energy can be used to increase UK food production, has reported that supplementary lighting has delivered a 24 per cent increase in lettuce biomass during spring growing trials.
16. Sainsbury's has entered into 10-year supply agreements with Thanet Earth and Evesham Vale Growers for tomatoes, peppers and cucumbers. The agreement will include Thanet Earth supplying cucumbers all years round.
17. Dyson Farming is working with LiVA Biotechnology of Israel to commercially trial LiVA's prebiotic bio-protection technology. In previous trials, after six post-harvest days, LiVA treated punnets delivered twice the proportion of harvest-fresh fruit compared to untreated controls.
18. Scientists at the University of Florida's Institute of Food and Agricultural Sciences, the United States Department of Agriculture and NASA have used hyperspectral imaging to detect stress in lettuce shortly after watering was reduced. This allowed plant stress to be identified well before any visible signs and could help growers using greenhouses or automated irrigation systems to adjust growing conditions sooner.

19. The International Bremia Evaluation Board Europe has advised, for the first time in several years, that no new Bremia variants of downy mildew in lettuce found in Europe was deemed significant enough to warrant an official denomination.

Other livestock news

1. During July, new cases of bluetongue BTV-3 were identified in Devon (25), Somerset (15), Wales (2), Cheshire (3), Staffordshire (5), Cornwall (7), Lancashire (2), Dorset, Wiltshire and Derbyshire (3).
2. Tesco has announced enhancements for its Tesco Sustainable Beef Group. Members will benefit from a new 3-year contract, earning an additional amount per kg by meeting new standards focused on quality, breeding, animal health and welfare, and sustainability. There will also be a bonus incentive for new levels of traceability through whole-life assured cattle. Farmers will be financially supported to take part in Tesco's baselining work with Soil Association Exchange. 600 farmers, who were previously part of the group, will move to a new Aberdeen Angus contract and will be able to earn an additional amount per kg by meeting criteria focusing on age, weight and genetics.
3. The Animal Health and Plant Health Agency has reported that an internal audit has revealed that some farms have been overpaid bovine TB compensation. The review goes back 6 years.
4. During June, with comparisons to a year earlier:
 - UK prime cattle slaughterings fell by 3.2 per cent to 158,000 head.
 - Beef and veal production fell by 0.4 per cent to 70,000 tonnes.
 - Sheep slaughterings fell by 20 per cent to 762,000 head.
 - Mutton and lamb production fell by 18 per cent to 19,000 tonnes.
 - Pig slaughterings rose by 4.9 per cent to 889,000 head.
 - Pigmeat production rose by 5.2 per cent to 83,000 tonnes.
5. By 13 July, and since 23 May, 4 further outbreaks of Foot and Mouth Disease have been reported in Cyprus and 55 in Greece.
6. The former East Suisnish Ferry Pier Shore on Raasay is to be converted into a venison processing facility at a cost of £129,000, ending the need to transport carcasses off the island.
7. The Rabobank dairy outlook for the period July-September shows:
 - Production is expected to peak in this period, flatten in quarter 3 and contract in quarter 4 resulting in growth of 1 per cent in 2026/27, down from 3.1 per cent in 2025/26.
 - Skimmed milk powder and whey are strengthening on protein demand but butter and cheese face oversupply.
 - EU and UK production will increase by 0.2 per cent in this quarter but will fall back by 1 per cent in the second half of the year.

8. According to AHDB, in the 3 months to June, the Actual Milk Price Equivalent processing costs increased by 0.06ppl while the Milk for Cheese Value Equivalent increased by 0.08ppl, mainly as a result of energy price increases.
9. Changes announced to milk prices include Freshways, a 3ppl increase taking its price to 32ppl.
10. The AHDB Milk Every Moment campaign has seen that student understanding that milk can support sporting performance reached 79 per cent in April, up from 76 per cent in December:
 - 67 per cent recognise that milk provides a range of vitamins and minerals.
 - 90 per cent agree that milk can form part of a healthy, balanced diet.Since its launch in 2024, the campaign has generated:
 - More than 16 million digital impressions.
 - Reached over 9 million people.
 - Had over 248,000 engagements across TikTok and Instagram.
11. During May, with comparisons for April
 - Milk available to processors increased by 3.1 per cent to 1,394 million litres.
 - Liquid milk production increased by 0.6 per cent to 514 million litres.
 - Cheese production fell by 1.2 per cent to 46,400 tonnes.
 - Butter production fell by 0.4 per cent to 20,100 tonnes.
12. Since the launch of the electronic Medicines Book in 2015, total anti-biotic use in the UK pig industry has fallen by 72 per cent to 77.2mg/PCU in 2025 and is down 10 per cent on 2024. The system captures data from over 94 per cent of UK pig production.
13. The European Food Safety Authority has reported that cases of African swine fever are more prevalent in domestic pigs in the summer while more prevalent in wild boar during the winter months. New cases have been reported in domestic pigs in Tuscany, Italy, the first in this area. There have been additional cases in domestic pigs in Bosnia and Herzegovina, Croatia, Hungary, Italy, Moldova, Poland, Serbia and Ukraine.
14. The Scottish Government is to provide £2 millions to independent pig producers to assist in covering losses incurred since March. Since the start of the year, Scotland has lost 15 per cent of its sows and 4 producers have exited the market.
15. In the first quarter of the year, 273 million dozen eggs were produced for human consumption, 6 per cent up on a year ago and 0.3 per cent up on the December 2025 quarter. The average farm-gate price was 154p per dozen, up 3.9 per cent on a year ago and up 3.1 per cent on the December quarter. The production of egg products totalled 21,900 tonnes, up 44.6 per cent on a year ago and up 21 per cent on the December quarter.

16. 13 outbreaks of Newcastle disease have been reported in the Spanish province of Valladolid, the first outside Valencia, despite being 400km from the nearest outbreak. Outbreaks have declined elsewhere in Europe, particularly in Germany and Poland.

VIII Inputs/Supply businesses

1. The US Supreme Court has overturned the decision of a Missouri jury in the case of Monsanto v Durnell which awarded gardener John Durnell \$1.25 millions after he alleged years of using Roundup had led him to develop non-Hodgkin lymphoma. The court ruled that US federal pesticide law overrides any state-based 'failure-to-warn' claims where US Environmental Protection Agency (EPA) has already approved a product's label. The US EPA, the European Food Safety Authority and the UK's HSE Chemicals Regulation Division have all said that glyphosate is safe when used according to label instructions.
2. Scientists at the James Hutton Institute have begun a new research project, funded by the Plant Health Centre and supported by Rural and Environmental Science and Analytical Services, to develop a clear UK-wide roadmap for using DNA technology to improve the detection and monitoring of harmful plant pests and pathogens.
3. BASF has launched Aphena, a biological product designed to amplify natural aphid control. The product contains a natural pheromone that aphids release as an alarm signal when disturbed and ladybirds and lacewings have learnt to use this scent to locate their prey. It has been calculated that, without natural limits, aphids could cover the Earth in a layer 149 kilometres deep in a single year.
4. The Agricultural Price Index for May shows a fall of 0.6 per cent for veterinary services, compared to a year earlier, but increases of 0.7 per cent for seeds, 26.7 per cent for energy and lubricants, 31.3 per cent for fertilizers, 7.5 per cent for chemicals, 0.1 per cent for animal feedingstuffs, 6.7 per cent for equipment maintenance and 2 per cent for buildings maintenance. Compared to April, there were falls of 0.1 per cent for seeds, 2.7 per cent for energy and lubricants and 0.1 per cent for veterinary services but increases of 4.9 per cent for fertilizers, 0.1 per cent for animal feedingstuffs and 0.6 per cent for equipment maintenance.
5. Research conducted by ADAS across 11 commercial farms over 5 years has found that, on average, Variable Rate Nitrogen applications would have increased yields by only 0.05 tonnes per hectare and improved profits by £10 per hectare. Further, the environmental benefits were modest. The survey covered winter wheat, winter barley and oilseed rape.

6. The British Survey of Fertilizer Practice for 2025 has been published:
 - The overall nitrogen application rate increased by 6kg/ha to 127kg/ha on crops and by 8kg/ha to 42kg/ha on grass.
 - The crop area receiving dressing increased by 1 per cent to 88 per cent while the grass area increased by 6 per cent to 48 per cent.
 - The overall phosphate application rate fell by 1kg/ha to 16kg/ha on crops but increased by 1kg/ha to 5kg/ha on grass.
 - The crop area receiving dressing fell by 4 per cent to 31 per cent while the grass area was unmoved at 5 per cent.
 - The overall potash application rate on crops was unchanged at 22kg/ha but increased by 2kg/ha to 8kg/ha on grass.
 - The crop area receiving dressing fell by 3 per cent to 35 per cent but the grass area increased by 2 per cent to 30 per cent.
 - The overall sulphur application rate on crops increased by 2kg/ha to 31kg/ha and by 2kg/ha to 6kg/ha on grass.
 - The crop area receiving dressing increased by 3 per cent to 60 per cent and by 2 per cent to 15 per cent on grass.
7. As reported in Farmers Guide, the Slimers project (Strategies Leading to Improved Management and Enhanced Resilience against Slugs) has developed the Slimers Toolkit which combines soil mapping, AI and farmer-led monitoring to improve prediction and control of outbreaks of the grey field slug, which, it is estimated, costs UK arable farms £43.5 millions annually.
8. A new consortium of academics, agronomists and growers have come together under the TRACER-Post project, with funding from Innovate UK, to use AI, smart trapping and real time analytics to enable automated detection and classification of the Bean Seed Fly and Swede Midge which attack onion and brassica crops.

Marketing

1. The UK Packaging Pact, which was created in 2018, has entered into a 10-year voluntary agreement to help businesses eliminate unnecessary packaging. Five core Industry Expert Groups have been created to help transform how plastic packaging is designed, used and recycled. The chairs are heads at Tesco, M&S, Robinson Packaging, Suez and the British Plastics Federation. James Bull, head of packaging and food waste strategies at Tesco, will chair the 'Scale Reuse and Refill' industry expert group while Clare Edgar, head of packaging at M&S, will chair the 'Harmonising Data' group. James Riley, head of sustainability at Robinson, will chair the group optimising packaging, Stuart Hayward-Higham of Suez Recycling & Recovery UK will lead the circular infrastructure investment group and Brian Lodge, director of packaging at the British Plastics Federation will chair the films and flexibles group.
2. In response to antimicrobial use in livestock production, the EU has adopted measures that will remove Brazil as an approved exporter for a number of animal products, including beef and poultry, with effect from 3 September.

3. Fresh Produce Journal has published the top performing crops in 2025:
 - Strawberries have taken the crown for the first time with volumes up 9.8 per cent and value up 13.7 per cent.
 - Volumes of dessert apples fell by 2.5 per cent although value increased by 2.2 per cent, purely through inflation.
 - Volumes of tomatoes fell by 0.4 per cent although value increased by 2.1 per cent.
 - Volumes of old potatoes fell by 4.1 per cent and value by 2.5 per cent.
 - Broccoli volumes increased by 6.9 per cent although value fell by 0.9 per cent.
 - Onions held steady with volumes up 1.1 per cent and value up 0.2 per cent.
 - Surprisingly, volumes of new potatoes fell by 1.7 per cent while value fell by 3.6 per cent.
 - The adverse performance of Asda has had dragging effect on the sales of spring onions, down 2.5 per cent, although value increased by 2.6 per cent.
 - Asparagus continues to thrive with volumes up 1.7 per cent and value up 9.3 per cent.
 - Blackberries are one of the fastest growing categories with volumes up 14.4 per cent and value up 26.4 per cent.
 - Leeks have not had a good year with volumes down 7.2 per cent and value down 3.8 per cent but young shoppers are become more active.
 - Beetroot sales have soared with volumes up 10.7 per cent and value up 14 per cent because of the health benefits.
 - Peas have not had a good year with volumes down 11 per cent and value down 0.7 per cent, mainly due to a drop in yields following unfavourable growing conditions.
 - Volume sales of sprouts have fallen by 2.7 per cent but values have risen by 1.4 per cent. Weather is the main reason.
 - Parsnip sales have held up with a volume increase of 2.4 per cent, yet a value fall of 2.1 per cent.
4. According to Worldpanel by Numerator, in the 4 weeks to 12 July, shopping frequency reached its highest level since March 2020, with take-home sales increasing by 3.3 per cent.
5. AHDB has published data on the impact of different beef breeds on the market:
 - Named beef breeds, including Angus, Wagyu, Hereford and Native Breed accounted for 2.6 per cent of all retail beef sales over the past year, a decline of 11.7 per cent compared to a fall of 6.5 per cent in total beef sales.
 - Angus is the largest named beef breed, accounting for 1.9 per cent by volume but it is also the greatest faller while Wagyu only comprises 0.5 per cent by volume but increased its share by 50.2 per cent.
 - Aberdeen Angus is the most recognised beef breed with a 95 per cent awareness rating, its highest level in 4 years, while Wagyu has increased its awareness rating over the same period by 12 per cent to 75 per cent.

- In 2025, 29 per cent of prime cattle killed in GB were Aberdeen Angus or Aberdeen Angus X. 57 per cent were dairy beef animals with the remainder suckler herd. Registrations of Wagyu and Wagyu X peaked at 45,500 head in 2024, up from 13,500 head in 2021, but have since fallen back slightly.
- 6.** Data has been published by Worldpanel by Numerator UK covering the red meat retail performance in the 12 weeks to 12 July:
- Spend on beef increased by 6.3 per cent although volumes declined by 0.9 per cent.
 - Primary beef volumes fell by 1 per cent with mince down 4.5 per cent whereas beef steak volumes grew by 9.1 per cent and diced beef by 10.5 per cent.
 - Processed beef volumes grew by 3.1 per cent with burgers up 5.2 per cent.
 - Added value volumes grew 4.8 per cent with sous vide up 9.5 per cent.
 - Volumes of lamb fell by 1.4 per cent but spend increased by 5.9 per cent.
 - Volumes of primary lamb cuts fell by 6.9 per cent with roasting legs down 31.8 per cent.
 - Processed lamb volumes fell by 3.8 per cent but added value volumes increased by 5.3 per cent with sous vide up 6 per cent.
 - Pig meat volumes fell by 2.4 per cent while spend fell by 1.3 per cent.
 - Primary volumes increased by 1.5 per cent with roasting up 3.9 per cent and mince up 25.9 per cent.
 - Processed pig meat volumes fell by 4.3 per cent with bacon down 4.7 per cent, sliced cooked meats down 6.3 per cent and sausages down 3.2 per cent.
 - Added value volumes increased by 6.5 per cent with sous vide up 18.8 per cent.
- 7.** M&S has launched a campaign with Bowel Cancer UK to encourage customers to eat more fibre to reduce their risk of bowel cancer. 'Better with Beans' will run until 31 August and will result in the supermarket donating £50,000 to the charity.
- 8.** NIQ Homescan POD, Total GB has published data on the dairy retail performance in the 12 weeks to 11 July:
- Milk volumes declined by 1 per cent compared to the same period in 2025 but whole milk volumes continued to buck the trend with a 1.4 per cent increase.
 - Cow's cheese volumes increased by 2.8 per cent with spend up 1.6 per cent. Cheddar volumes fell by 0.7 per cent but others, such as cottage cheese, increased by 12.4 per cent, snacking by 5.4 per cent and speciality and continental by 3.3 per cent.
 - Butter volumes fell by 1.5 per cent while spend was down 4.6 per cent. Block butter continued to outperform with volumes up 4.5 per cent.
 - Volumes of yoghurt, yoghurt drinks and fromage frais grew by 8 per cent with spend up 10.2 per cent.
 - Cream volumes fell by 1.2 per cent but spend was up 1.7 per cent.

9. New data revealed by Veg Power has found that children participating in the 'Eat them to defeat them' campaign more than once ate an extra portion of veg per day compared to non-participating children and, as a result, 92 per cent of parents wanted their child to repeat the experience. Of 329 parents surveyed by the campaign, 86 per cent said their child ate more vegetables, 85 per cent said their child tried more vegetables, and 77 per cent said they ate more vegetables themselves. Currently, 80 per cent of children fail to achieve recommended intake levels of fresh produce, with a third eating under a single portion each day.
10. According to Worldpanel by Numerator, in the 12 weeks to 12 July, Lidl increased its market share by 0.5 per cent as a result of sales rising by 8.6 per cent while Ocado's sales rose by 14.1 per cent. Asda's sales fell again but only by 1.1 per cent.
11. Tesco has reintroduced its free apples for children at 800 of its larger stores and 77 of its Express stores. The initiative will run until 30 August.
12. Asda has enrolled 30 Welsh suppliers on a new development programme to help businesses upskill and gain insight into the retailer's compliance, marketing and product development. The initiative is a partnership with Food and Drink Wales.

Miscellaneous

1. A survey commissioned by The Food Foundation and the Food, Farming and Countryside Commission has revealed:
 - Only 7 per cent surveyed think the food system works well.
 - 45 per cent think food should be a higher priority for government than transport, water and housing.
 - 69 per cent suggest the government should do more to ensure food is healthy.
 - 90 per cent want farmers to receive a fair price which would cover the real cost of production.
 - 88 per cent want the food system to be resilient to global conflict and extreme weather.
 - 68 per cent want food produced without damaging the environment if it means higher prices.
2. A research project at Harper Adams University is investigating whether the Adoption Diffusion Outcome Prediction Tool (ADOPT), developed by Kuehne et al in 2017, could help strengthen early assessment of agricultural research, development and extension proposals in the UK. ADOPT was developed to estimate the likely extent and speed of adoption of agricultural innovations, based on characteristics of the target population, the innovation itself, learning processes, and expected benefits and risks. The research team is inviting advisers, researchers, industry specialists, technology providers and others with relevant experience to provide feedback on case studies. Interested parties should contact emaritan@harper-adams.ac.uk.

3. Figures from the Health and Safety Executive for the year to March show that agriculture, forestry and fishing continues to have the highest rate of fatal injuries per 100,000 workers. 22 workers lost their lives, the total being second only to construction where 25 workers died.
4. The annual Voice of the Farmer survey, conducted by NFU Mutual, involving 1,652 farmers across the UK, has revealed that the number of farmers who hold protection products, such as life assurance, has increased from 44 per cent in 2025 to 51 per cent.
5. In its latest Consumer Insights Tracker, the Food Standards Agency has reported that 52 per cent of consumers are buying less food because of higher prices. The figures, which cover the year to March, show that:
 - 91 per cent are concerned about food prices.
 - 64 per cent eat food past its use by date to save money.
 - 60 per cent have eaten leftovers kept in the fridge for more than 2 days.
 - 33 per cent turn off a hob or oven earlier to cook in residual heat.
 - 77 per cent are concerned about ultra-processed food.
 - 77 per cent are concerned about food waste in the supply chain.
 - 76 per cent are worried about animal welfare.
 - 76 per cent are concerned about the quality of food.
6. Tesco and Sainsbury's have joined over 100 food businesses in supporting the Good Food Bill which proposes a new framework to embed long-term objectives to ensure all have access to nutritious food. The bill includes measures such as:
 - Creating statutory targets to reduce childhood obesity
 - Creating a reference diet to guide policymaking.
 - 5-year government action plans.
 - Ministerial duties to consider the Good Food Bill when making decisions related to food.
 - Boosting domestic food and vegetable production and reducing the reliance on imported food.
7. Results of Defra's Farmer Opinion Tracker for England for April have been published:
 - 7 per cent of farmers fully and 50 per cent roughly understand Defra's vision for farming, similar to a year ago.
 - 36 per cent are making changes to their farm business while 46 per cent will need to do so in the next 5 years.
 - 53 per cent will be making changes to their agri-environment scheme arrangements within the next year.
 - 58 per cent believe that Defra paying for environmental outcomes will be very important while 22 per cent consider it will be moderately important.
 - 71 per cent are not confident that changes to schemes and regulations will lead to a successful future for farming.

- Only 3 per cent feel very positive about their future while 32 per cent are somewhat positive. The vast majority of the remainder are not at all confident.
 - The level of confidence in Defra remains low, 70 per cent are either not at all confident or are uncertain.
8. Research from the Institute of Occupational Safety and Health suggests that a culture of underreporting is hiding the true extent of workplace injuries in UK agriculture. A survey of 250 farmers found that 30 per cent were discouraged from reporting health and safety incidents because of inspection concerns, enforcement action or legal consequences.
 9. Felix, the charity merged from FareShare and The Felix Project, has reported that 41 per cent of local charities receiving food via its nationwide food redistribution network have experienced an increase in demand in the last 12 months.
 10. The Agricultural Engineers Association has reported 5,955 new tractor registrations in the 6 months to 30 June, up 22.3 per cent on the same period in 2025.
 11. According to The Global FoodBanking Network, the amount of produce donated to global food banks from farms increased by 55 per cent in 2025 to 228,000 tonnes.
 12. The James Hutton Institute has launched a new Corporate Plan covering the period 2026-2031. The plan includes a major update to the Hutton's Climate Action Plan, which commits to reducing greenhouse gas emissions by at least two thirds by 2030; expanding renewable energy; improving energy efficiency; reducing travel emissions; and managing research farms to support carbon neutrality. The plan follows the 2025 BIGGAR Economics Impact Report which found that every £1 invested by the Scottish Government in the Institute returned £15 to the UK economy.
 13. Felix, City Harvest, The Bread and Butter Thing, Community Shop, Feeding Britain, His Church, Neighbourly and Xcess Network have all signed a new covenant to treble food redistribution in the UK over the next decade.
 14. New regulations will replace the current waste carriers, brokers and dealers registration scheme by a full environmental permitting system. Applicants will face identity, tax and criminal record checks, together with requirements to demonstrate technical competence before being allowed to operate.
 15. Financed by Horizon Europe, an EU funding program for research and innovation, the James Hutton Institute is to lead a €6 millions project aiming to bring more young people into farming involving 15 partners organisations from across Europe. The project, Farm Heroes, will last for 4 years and will also address a lack of women entering the industry.

16. AHDB and LEAF have joined forces to enable 80 farmers to take part in the School Farm Visits Support programme. Those taking part will receive:

- Fully funded Countryside Educational Visits Accreditation Scheme training.
- Tailored one-to-one support with a LEAF Education Specialist.
- Practical resources and ongoing support including access to a network of experienced host farms.

Postscripts

1. There was an old man who lived in a forest. As he grew older and older, he started losing his hair, until one day, on his deathbed, he was completely bald. That day, he called his children to a meeting. He said, "Look at my hair. It used to be so magnificent, but it's completely gone now. My hair can't be saved. But look outside at the forest. It's such a lovely forest with so many trees, but sooner or later they'll all be cut down and this forest will look as bald as my hair." "What I want you to do ..." the man continued. "Is, every time a tree is cut down or dies, plant a new one in my memory. Tell your descendants to do the same. It shall be our family's duty to keep this forest strong." So, they did. Each time the forest lost a tree, the children replanted one, and so did their children, and their children after them. And for centuries, the forest remained as lush and pretty as it once was, all because of one man and his re-seeding heirline.
2. Set your wifi password to 2444666668888888. So, when someone asks tell them it's 12345678.
3. An angel appears in a puff of smoke to a man and says to him, "Because you have lived a good and virtuous life, I can offer you a gift: you can be the most handsome man in the world, or you can have infinite wisdom, or you can have limitless wealth." Reflecting, the man says, "I'll take the wisdom". "Wisdom is yours," says the angel, disappearing in another puff. The smoke is barely clear before the man thinks, "I should have taken the money."
4. A gorilla dies of old age at a zoo right before the zoo opens. It is the only gorilla at the zoo since they are not very profitable. However, the gorilla is their most popular attraction by far, and they can't afford to go a day without it. So, the zoo owner asks one of his workers to wear a gorilla suit they have in storage for an extra £100 a day if he will go in the gorilla cage and pretend to be the gorilla until the zoo can afford a new one. Quickly, the new "gorilla" becomes the most popular craze at the zoo. People from all over are coming to see the "Human-like" gorilla. About a month in, the craze has started to wear off. So, to get peoples' attention back, he decides to climb over his enclosure and hang from the net ceiling above the lions' den next to him. A large crowd of people gather watching the spectacle in awe and terror. Suddenly the man loses his grip and falls to the floor of the lion's den. The man starts screaming "HELP!! HELP!!!". Suddenly a lion pounces him from behind and whispers in his ear, "Shut up right now or you're going to get us both fired."

5. How can you tell your girlfriend is getting fat? She fits in your wife's clothes.
6. An Englishman, a Frenchman, a ravishing blonde and an old lady are sharing a compartment on a train as it winds its way through the Alps. Every now and then the train passes through a tunnel, during which time the compartment is plunged into complete darkness. On one such occasion, a ringing slap is heard and as the train passes back into daylight, the Frenchman is rubbing his sore, red cheek. The old lady thinks, "I bet that dirty Frenchman fondled the blonde and she struck the pervert." The blonde thinks, "I bet that filthy Frenchman was looking to grope me in the dark, mistook the old lady for me and she slapped him." The Frenchman thinks, "I bet that perfidious Englishman touched up the blonde in the dark and she slapped me by mistake." The Englishman thinks, "I can't wait for another tunnel so I can slap that Frenchman again."
7. A Navy man walks into a bar, gives the bartender a conspiratorial wink, and says, "Quick, pour me a drink, before the trouble starts." The bartender pours a drink and watches as the sailor downs it in one gulp. The sailor slams the glass down on the bar and says, "Quick, give me another one before the trouble starts." The bartender pours another glass and the sailor drinks it as quickly as he had the first. The sailor pauses, lets out a belch and demands a third drink 'before the trouble starts.' After several rounds of this, the bartender says, "Look sailor, you've been talking about trouble for ten minutes. Just when is this 'trouble' going to start?" The sailor looks at the bartender and grins. "The trouble starts just as soon as you figure out that I don't have any money."
8. At a party, a woman admonished her husband, saying, "That's the fourth time you've gone back for ice cream and cake. Doesn't it embarrass you?" He shrugged and answered, "Why should it? I keep telling them it's for you."
9. "I'd like a bottle of wine," a woman told her waiter. "What year, ma'am?" the waiter replied. She huffed and said, "Well, I'd like it right now."

Cut off the hand and the benevolent will also suffer!!

It is fair to say the outlook for those with 'wealth' or 'high incomes' is not good. A 'mansion' tax, a 'wealth' tax, an increase in Capital Gains Tax, an increase in the top rate of Income Tax – all of these are possibilities. For those living in the southern part of England, an increase in Council Tax is likely as government funding is channelled northwards.

What those in power fail to consider is the impact all or any of the above will have on the charity sector.

In the year to April, Gift Aid paid to charities increased by 10 per cent to £1.8 billions while Inheritance Tax relief for donations increased by 6 per cent to £1.28 billions.

As regards Gift Aid, almost half of the 10 per cent increase was the result of a small number of very large donations. The number of charities receiving Gift Aid in excess of £1 millions from HM Revenue & Customs increased from 1,580 to 1,660 but the number of people declaring Gift Aid donations on Tax Returns in 2024/25 fell from 1.32 millions to 1.30 millions even though the value increased from £4.1 billions to £4.7 billions. This was largely due to an increase in donations of over £10,000.

As regards donors, 7 per cent of those with income under £50,000 declared a donation compared with 37 per cent of those with income over £250,000 and 20 per cent of donors were aged 65 or over.

It is also noticeable that the number of employees participating in the Payroll Giving Scheme fell from 504,000 to 475,000.

In London and the South East, 541,000 taxpayers declared donations totalling £2.678 millions. In the North East, North West and Yorkshire and Humberside, 178,000 taxpayers declared donations totalling £408,000.

All the above suggests that those individuals who are most likely to be affected by potential tax changes are those who are the greatest contributors to charity.

If cloth is to be cut, it will not just be the 'better off' who suffer but also those bodies which strive to help the underprivileged, wildlife and the environment.

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:

Karen Blackiston, Nick Holmes, Iain Morris, Ben Wilkinson

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The MFU was edited from 1991 to 2006 by John Nix, Emeritus Professor of
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