CHAVEREYS

CHARTERED ACCOUNTANTS & FINANCIAL ALCHEMISTS



Monthly Farming Update

November 2026

Policy issues

1. Is that it? The agricultural community was hoping for some relief from the battering it has taken from the present Government. Instead, it got as near to nothing as one can get and some insults thrown in to boot. Some of the relevant measures:

   - An increase in the minimum wage – see Finance. More costs.
   - Some business rates relief – see Finance. Possibly some help to diversified farms but unlikely to have much impact.
   - Reduced tariffs on certain imported foods – see Marketing. So, less costs for imports, more costs for home-grown.
   - Highly publicised reduction in fertilizer tariffs – see Inputs. Of little practical benefit to UK farmers.
   - Postponement of increases in fuel duty – see Finance. At least no extra cost but no savings.
   - A 4 per cent increase in the Income Tax rate applicable to property and interest income from 2027/28. Many farms have let buildings or cottages and survive on this income while few have savings. This will hurt.
   - An increase in the rate of equipment First Year Allowance from 40 per cent to 50 per cent – this may benefit some, but not many farming businesses.
   - A reduction in the rate of Writing Down Allowance from 14 per cent to 12 per cent – unhelpful.
   - A consultation on the introduction of quarterly Income Tax payments on account from April 2029 rather than half-yearly as at present – more cash flow issues.
   - VAT and PAYE to be collected by direct debit – more cash flow issues.

   The policy will have different degrees of impact on farming businesses but, overall, the impact will almost certainly be negative. To be expected from a government which has abandoned the rural sector.

2. Defra has announced an extension of the 'easement' of inspections on fruit and vegetables imported from Europe. The easement has been extended until 31 January 2028 as an EU-UK Sanitary and Phytosanitary Agreement is expected to be in place by then.

3. At the Conservative Party conference, statements included:

   - The first stage of a review into 34 quangos attached to Defra has been completed.
   - The Environment Agency and Natural England would be abolished.
   - An Environment Crime and Enforcement Authority would be created.
   - Natural Resources Wales would be scrapped.
   - The restriction on Inheritance Tax relief for farming assets would be removed.
   - A family home would be excluded from an Inheritance Tax assessment.

4. The Food Foundation has criticized the 2026 Budget questioning the efficacy of 'removing tariffs on gherkins, toffees and sweets.' It stated 'the Government's Budget recognises the cost-of-living crisis through measures on energy bills and housing but gives a worrying lack of attention to the UK's food system as prices continue to rise, with healthier food nearly twice as expensive per calorie as less healthy.'

Reform

1. The Environment, Food and Rural Affairs Committee has invited farmers to share their experiences of applying for the Sustainable Farming Incentive. Questions include:
   - Whether they were able to submit an SFI application before the window closed, and what prevented them from doing so if not.
   - Whether they were aware of notifications when 25 per cent, 50 per cent, and 75 per cent of funds had been allocated.
   - If they now have to make changes to their business after being unable to submit an application.
2. Despite more than £65 millions being handed to farmers under the Sustainable Farming Incentive over a 3-year period to assess and manage their soils, Defra failed to routinely collect the results. 75,000 farm businesses participated in SAM1/CSAM1 soil actions requiring them to assess soil health, write a soil management plan and test soil organic matter. The Sustainable Soils Alliance has discovered the data was only requested by the Rural Payments Agency on an ad hoc basis as part of their inspection process.

Grants/regulations/legislation/environment

1. The Environment Agency has announced temporary measures allowing farmers and growers to abstract water outside the authorised abstraction period to fill existing water storage reservoirs. However, the authorisation does not apply to Principal Salmon Rivers or to catchments with a section 57 spray irrigation restriction.
2. During September, average rainfall across England was only 65 per cent of the normal expected amount, with the East only getting 52 per cent and the South East 57 per cent. At this time of year, reservoirs should be 74.3 per cent full but Wimbleball, in Somerset, is only 21 per cent full, and Ardingly, in West Sussex, just 23 per cent full.
3. The Environment Agency has declared 'severe drought' in parts of Cornwall, Devon, Somerset, East and West Sussex. Severe drought is the highest level and is only declared when drought is causing, or will soon cause, serious harm and emergency action is needed to protect people, water supplies, the environment and critical supplies.

4. A new Flood and Drought Resilience Task Force has been launched including representatives from the Environment Agency, Met Office, Mayoral authorities, the Fire and Rescue Services and the farming, water and insurance industries.

5. Defra has published the Organic Action Plan for England which has been developed in partnership with the English Organic Forum. The plan will have 3 themes:

   - Increase and manage organic supply through targeted support for existing and new organic producers and processors.
   - Realignment of existing and emerging domestic supply and demand with an increased proportion of sales met by domestic production.
   - Increase demand for English organic produce through increasing consumer awareness and stimulating demand from the public sector.

   Delivery of the plan will be measured against 5 outcomes:

   - A year-on-year closing of the gap between imports and exports of organic goods.
   - An aim to grow the organically managed land area to 10 per cent.
   - An assessment of the contribution of organic production and consumption to the Environment Improvement Plan.
   - A sustained increase in the share of organic food within public sector purchasing.
   - Growth in the knowledge and understanding of organic production among farmers, growers and consumers.

6. Another setback for the food and farming sector. In 2025, Defra helped fund the Surplus with Purpose scheme, run by food charity Felix, which covers the cost of harvesting and packaging "good to eat" surplus produce. This year, Defra has reduced its level of support with the result that Felix has reported a 19 per cent fall in available fresh produce.

7. The results of the lowland Peat 3+ project, undertaken by the Environment Agency's Chief Scientist's Group, have been published. The research provides new evidence about the feasibility of raising water tables in lowland agricultural peatlands and some of the implications for water quality.

8. Data has been published on wild bird populations in the UK:

   - Since 1970, the breeding bird indicator has fallen by 19 per cent in the UK and by 15 per cent in England. The main period of decline was between the late 1970s and the early 1990s but there has been a downward trend since the mid-2010s.
   - Farmland bird populations have fallen by 63 per cent since 1970 and by 12 per cent since 2020. Woodland bird populations have fallen by 32 per cent in the UK and by 37 per cent in England since 1970. In the UK there has been little change since 2020, but England has registered a fall of 6 per cent.
   - There has been little change in the UK in breeding water and wetland bird populations since 1975 but there have been falls in England of 17 per cent since 1970 and 6 per cent since 2020.

- Upland bird populations have declined by 19 per cent in the UK and by 15 per cent in England since 1994.
- As regards farmland birds, yellow wagtail are down 75 per cent on 1970; greenfinch are down 65 per cent; kestrel down 51 per cent; reed bunting down 39 per cent; turtle dove, tree sparrow, grey partridge, corn bunting and starling are all down by over 85 per cent; while lapwing, yellowhammer, linnet and skylark are all down by over 50 per cent. However, populations of wood pigeon, jackdaw, stock dove and goldfinch have all more than doubled.

9. An article in the Journal of Applied Ecology has compared the merits of tree planting with natural colonisation. The authors compared 60 years of naturally colonised and planted forest patches, all adjacent to mature forest. Both canopy height and basal area, predictors of above-ground biomass, were consistently higher in planted forest patches whereas naturally colonised forests had more open canopies. The conclusion was that tree planting may be preferred for carbon storage and timber production whereas natural colonisation will increase forest diversity.

10. Defra is to make £53 millions available between April 2027 and March 2030 for the Community Trees Fund to plant up to 500,000 new trees outside woodlands, such as on streets, in parks and across rural landscapes.

11. The Horticultural Trades Association has opened applications for Broad Horizons, a fully funded development programme designed to build the skills, knowledge, experience and confidence of those working across environmental horticulture. Applicants must have their employer's full support and be able to commit to all programme activities throughout the year. Details are available at broadhorizons@hta.org.uk.

12. The Forest Stewardship Council has awarded the Small & Farm Woodland of the Year 2026 to Hole Park Estate, Rolvenden, Kent for 20 hectares of specialised cricket bat willow plantations.

13. The Scottish Government has published updated guidance for the next round of the Future Farming Investment Scheme which will open shortly with £14.25 millions available.

14. Defra is to make £26 millions available to enable local authorities make environmental improvements in their area.

15. Along with Forestry England, Forest Research has released information on five alternative productive species that can be resilient in stressful conditions and provides data on the species' origins; silvicultural characteristics; site requirements; timber properties; and their anticipated place in the future of British forestry. The species are coast redwood; Douglas fir; maritime pine; red oak and Western red cedar. The information is available on-line from Forest Research on the web page Enhancing forest resilience through stand structural complexity – Centre for Forest Protection.

16. The Scottish Government has allocated a further £1 million of funding for nature recovery projects including £150,100 for the recovery and restoration work following the Abernethy wildfire in the Cairngorms.

17. Applications have opened for the Welsh Peatlands Restoration Grant. The total available is £700,000 and applications are invited for grants of £10,000 - £250,000. Projects must occur during the year to March 2028 and should cover peatland erosion; peatland drainage; sustainable management of blanket peats; sustainable management of lowland peats; restoration of afforested peats; and gradual restoration of the highest carbon-emitting peatlands. Applications will close on 30 November.

Other matters of farm finance and tenure

1. The Autumn Budget includes:

   - A cancelling of plans to add 5p to fuel duty in January.
   - The 3.7p cut to duty on red diesel is extended to 1 July, at a cost of £30 millions in 2027/28.
   - Import tariffs of 4 per cent on kerosene are removed until December 2028.
   - Import tariffs on fertilizer are removed until December 2027 but the impact is marginal as, during 2026, 100 per cent of ammonium nitrate and 57 per cent of granular urea has come from the EU on which tariffs are not levied and most of the remainder of urea comes from Algeria and Egypt which are also tariff free.
   - Gas standing charges are to be abolished in 2027.
   - The small business rates relief threshold is extended to £18,000 for full relief and to £21,000 for tapered relief for retail, hospitality and leisure properties. For other properties in these sectors, rates will be frozen for 2 years. The cost to the Exchequer is estimated to be £315 millions in 2027/28.
   - The National Living Wage and the National Minimum wage will both increase by 3.9 per cent on 1 April.

2. A poll conducted by the CLA has revealed that 90 per cent of family businesses have paused investment and, in some cases, are actively devaluing their businesses to avoid incurring tax changes following the changes to the Inheritance Tax scheme. Some have described cancelling the creation of holiday lets, postponing buying new machinery, delaying the building of new reservoirs and allowing buildings and land to deteriorate. Over a third have shelved projects costing over £150,000 while 64 per cent have abandoned plans costing over £50,000. 50 per cent have reported they will have to sell at least 25 per cent of their land to fund the tax while 25 per cent claim they will have to sell more than half their land. 70 per cent of farmers are concerned their business will not survive the next 10 years while 29 per cent are seriously considering leaving the industry in the next 5 years.

3. A survey conducted by McCain covering 200 farmers has reported that 42 per cent have considered leaving their farms in the past year while 40 per cent have questioned whether they will still be farming in 10 years' time. 77 per cent of all respondents claimed that government policy was the biggest threat to farming's future and 91 per cent claimed that government support was inadequate.
4. The Andersons Centre has estimated that agricultural input inflation reached 7.8 per cent in the year to September 2026, up from 7.2 per cent in August and 1.7 per cent in January. Fertilizer prices are up 35 per cent, energy and lubricants by over 25 per cent, contractor charges 11 per cent, wages 5 per cent and feed prices 3 per cent. However, output prices have fallen by 1.3 per cent compared to a year ago.
5. A report published in Agricology from the Basic Income for Farmers Collective suggests that the Scottish Government should issue a monthly basic income payment of £1,000 to all farmers, crofters, growers and farm workers actively working in agriculture in Scotland with payment made to the individual rather than the farm business. Ignoring subsidy payments, the average farm profit in 2025/25 was £500 following a loss of £13,900 in 2023/24. Although farms of under 50 hectares make up 73 per cent of the total, the majority of subsidies are still paid on a per hectare basis.
6. Scotland's June Agricultural Census 2026 has been published:
    - Cattle numbers were 1.67 million head, up 0.7 per cent on 2025 but down 1.3 per cent on the 5-year average.
    - Pig numbers rose by 4.9 per cent to 327,700 head but were down 1.2 per cent on the 5-year average.
    - Sheep numbers were down 0.5 per cent at 6.5 million head and were 2.2 per cent below the 5-year average.
    - Poultry numbers were down 4.4 per cent at 11.88 million birds.
    - The winter cereals area was up 6.9 per cent on the 5-year average but the spring cereals area was down 17 per cent.
    - The area of soft fruit was 1,800 ha, 10 per cent down on the 5-year average and the lowest since 2015, mainly caused by a fall in strawberry production.
    - The number of people working in agriculture fell by 700 to 66,100.
7. A survey conducted by the Tenant Farmers Association has found that 85 per cent of tenant farmers who required additional finance were seeking to borrow £10,000 - £50,000 with over 50 per cent needing to borrow over £20,000. 90 per cent of those seeking borrowing were concerned it would be 'somewhat or very difficult to secure', while 80 per cent believed it was more difficult to obtain extra finance as a tenant farmer. 81 per cent thought they would use a government-backed interest-free business loan scheme if one was available.
8. During August, the Agricultural Price Index for outputs fell by 5.4 per cent, compared to a year ago, but was up 0.9 per cent on July. The index for inputs was up 8.6 per cent and 1.4 per cent respectively.

9. England's material footprint, the amount of primary raw materials needed to support the goods and services consumed by residents, fell by 9 per cent in 2023 to 1,006 m/t:
    - Raw material consumption per-capita fell by 10 per cent to 17 tonnes.
    - Non-metallic materials accounted for 48 per cent of the total, biomass 23 per cent, fossil fuels 19 per cent and metal ores 10 per cent.
    - Household consumption represented 69 per cent of total consumption, followed by gross fixed capital formation at 20 per cent and central government 7 per cent.
    - Food and non-alcoholic beverages and transportation accounted for 41 per cent of household consumption.
    - Resource productivity increased to £2.38 of gross value added per kg of raw material consumption, up 6 per cent.
10. The State of Agricultural Research and Innovation has been published by the Centre for Agricultural Research Impact. The report has mapped £1.2 billions of publicly funded research between 2022 and 2026 and included the opinions of over 600 farmers. Extending to over 100 pages, the conclusions of the report are:
    - Transparent mechanisms need to include stakeholders in research priority-setting.
    - There must be sector-wide strategic coordination of agricultural research and research funding.
    - The share of research geared towards improving practitioner knowledge and skills must be increased.
    - User-centred research programmes must be strengthened and grown.
    - Mechanisms to respond to emerging needs in projects must be included.
    - There must be regular foresight and long-term funding pathways.
11. A report from Geering Chartered Surveyors is questioning the methodology behind agricultural valuations in an era where Biodiversity Net Gain and conservation covenants are turning farmland into an asset that earns a contracted income for decades. It is suggested that the land should be valued on a yield basis, as with commercial leases. Further, at the conclusion of the commitment, the soil structure may be improved and biodiversity value embedded with the possibility that public policy may further entrench conservation use and market demand for environmental credits may have deepened.
12. The latest Strutt & Parker Farmland Database reports the average price achieved for arable land over the first 9 months of 2026 was £10,600/acre, while the average for grassland was £8,700/acre. A total of 22,800 acres was publicly marketed, 16 per cent below the 5-year average and 33,800 acres down on the same period in 2025. Farmers accounted for 62 per cent of land purchased, the highest for over a decade.

13. The Scottish Government has published the Community Engagement Obligations and draft large land holding guidance under the Land Reform (Scotland) Act 2025 consultation paper seeking views on what information should be included in new Land Management Plans.

14. Tesco's annual Greenprint farmer survey has found that 58 per cent of farmers have introduced innovation in the past year, up from 46 per cent, yet 76 per cent of those surveyed said getting innovation onto farms is challenging or very challenging.

15. Worldwide Fruit Ltd, based in Lincolnshire, has launched a bespoke Ethical & Environmental Training Programme, designed to strengthen how the business identifies, assesses and responds to interconnected human rights, labour, environmental and climate-related risks across its high-risk sourcing regions.

Product prices

A. Market background

1. Sterling improved against both the Euro and the US Dollar this month; more notably against the Euro but more volatile against the Dollar. Having opened the month at 85.8p per Euro, Sterling improved steadily, and with purpose, throughout October with minimal volatility to close the month at 83.3p per € (2.5p stronger overall). Against the US Dollar the story was very different: Sterling opened at 75.5p per $ and, despite some volatility and a short-lived dip to 76.0p, held its level for the first half of the month; the remainder of the month was far more volatile, peaking at 74.4p and dropping to 75.3p; closing the month at 74.6p per $ (up 0.9p).

2. The gold price kept some volatility but closed down overall; opening at £3,139 per troy ounce, the average price climbed marginally to peak at £3,180, before falling back to close the month at £2,904 (down £235 overall).

3. Crude oil prices opened the month by falling back marginally, before climbing again for most of the remainder of the month, whilst the final days saw the average relax marginally. The ongoing issues in Iran and the Ukraine remain the main drivers in the market. Brent Crude opened at $108.40 per barrel and dropped back to $100.20 in the opening days before climbing to a late-month peak of $116.72; the price settled in the final days to a closing October average of $113.43 per barrel, up $5.03.

B. Crops

1. The cereals market fell back this month. Whilst the Black Sea and Strait of Hormuz issues remained, the market view, that matters have not worsened and may have improved, applied downward price pressure generally. Further downward pressure came from improvements in weather patterns across the main US grain growing states and a stronger Sterling. Milling wheat premiums remain low but have risen marginally above £10 per tonne. Feed wheat futures fell across the board, bringing the pricing for the three quoted seasons close to parity; by late October, deliveries for November 2026, 2027, and 2028 were

£193/tonne (-14), £194/tonne (-10) and £198/tonne (-3) respectively. Oilseed rape prices have fallen, driven largely by the favourable soya bean harvest in the US and indications that a diplomatic solution to the Black Sea conflict may be possible (albeit some way off); the negative impact was reduced by the increased crude oil prices.

Average spot prices in late October (per tonne ex-farm): feed wheat £199 (-5); milling wheat £210 (-3); feed barley £177 (-4); oilseed rape £445 (-8); feed peas £229 (+9); feed beans £224 (-19).

C. Livestock

1. The average liveweight cattle prices for steers closed marginally down this month, whilst the heifer average closed marginally up. The average steer price opened at 360p/kg lw and initially fell to 358p/kg, then climbed to 369p/kg before falling again to close October at an average price of 358p/kg lw (down 2p to sit 18p/kg below the average a year earlier). The average finished heifer price followed a similar path albeit without falling so far at the end of the month: opening at 372p/kg lw, it fell to 369p/kg and rose to peak at 379p/kg, before relaxing at the end of the month to close at 378p/kg (up 6p overall to sit 9p below the average a year earlier). The average dairy cow price remained strong but volatile, closing marginally down overall; climbing from an opening position of £2,094 per head to peak at £2,473; falling to £2,111 and climbing back to £2,310, before falling to close the month at £2,052 per head (down £42 overall to sit £107 above the prior year average).
2. The average finished lamb price (new season SQQ liveweight) held relatively steady this month, in the context of the swings seen in previous months. Opening the month at 340p/kg, the average price dropped to 333p/kg but recovered partially to close at 336p/kg (down 4p overall, to sit 28p/kg above the average new season price a year earlier).
3. The average UK standard pig price (SPP deadweight), having made gains in September, lost those gains and more in October. From an opening position of 180.8p/kg dw, the average held steady in the early weeks but fell back in the latter part of the month to a late October closing average of 176.4p/kg (down 4.4p overall to sit 27.2p/kg below the previous year).
4. The initial average UK all milk price for August remains the most recent information available, being: 36.89ppl, a significant 1.42ppl above the July average of 35.47ppl to sit 8.34ppl below the average a year earlier and 5.86ppl below the rolling 5-year average. The EU average milk price for August was 37.68ppl, 0.93ppl above the July average and 9.68ppl below the price a year earlier.

Other crop news

1. Defra has published its first estimate of the 2026 harvest:
   - Total wheat is estimated at 10.8m/t, 0.8 per cent up on 2025 as a result of a 2.7 per cent increase in average yield to 7.2t/ha. The highest average yield was recorded in the North East at 8.4t/ha while the highest production increase was 6.5 per cent recorded in Yorkshire and the Humber.
   - Total barley is estimated to be 3.7 m/t, down 11 per cent. Winter barley production rose by 1.7 per cent but spring barley fell by 23 per cent. Winter barley yields were static at 6.6 t/ha but spring barley yields fell by 8 per cent. Only Yorkshire and the Humber recorded a production increase, at 2.1 per cent.
   - Total oats production fell by 29 per cent to 527,000 tonnes. Average yields fell by 11 per cent to 4.1t/ha.
   - Total oilseed rape production rose by 43 per cent to 1 m/t. The area increased by 36 per cent and the average yield by 5.9 per cent. The North East recorded the largest increase, at 53 per cent.
2. AHDB has published its early balance sheets for wheat and barley for 2026/27. All figures are in thousand tonnes:

	5-year average	2025/26	2026/27	Percentage change	5-year average percentage change
Wheat					
Opening stocks	1,979	1,980	1,514	-24	-23
Production	13,322	11,958	12,074	1	-9
Imports	2,295	2,615	2,750	5	20
Availability	17,596	16,553	16,338	-1	-7
Human and industrial consumption	7,131	6,564	6,411	-2	-10
Animal feed	7,069	7,220	7,249	0.4	2.5
Seeds etc	325	319	319	-	-2
Domestic consumption	14,525	14,103	13,979	-1	-4
Balance	3,071	2,450	2,359	-4	-23
Barley					
Opening stocks	1,146	1,279	1,337	5	17
Production	6,953	6,367	5,614	-12	-19
Imports	165	213	250	17	52
Availability	8,264	7,859	7,201	-8	-13
Human and Industrial consumption	1,806	1,456	1,407	-3	-22
Animal feed	4,248	4,378	4,393	0.3	3.4
Seeds etc.	215	206	201	-2.4	-6.5
Domestic consumption	6,269	6,040	6,001	-1	-4
Balance	1,995	1,819	1,200	-34	-40

3. Scientists at the James Hutton Institute have analysed data from its Centre for Sustainable Cropping, near Dundee, comparing spring barley grown after field beans with barley grown after barley. Matters involved reduced tillage, organic matter inputs, cover and companion cropping, more targeted pesticide use, nutrient budgeting and biodiversity – supporting field features. The study found that synthetic nitrogen fertilizer use for barley following beans was reduced by an average of 22kg per hectare with pesticide use also lower. Across 5 two-year cropping periods, growing field beans before barley reduced the environmental impact of barley production in 4 of the 5 periods with an overall average reduction of 25 per cent. Further, the spring barley yielded an average 1.2 tonnes per hectare more than barley following barley in 4 of the 5 years. However, the study advised that the results can be influenced by the weather, particularly temperature and humidity.
4. Trials conducted by the University of Reading have suggested that intercrops generally increase yields, wheat grain protein and total protein compared with a wheat monocrop. Rows planted at a 50:50 rate revealed that yield benefits began to fall once a nitrogen application exceeded 75 per cent of a standard wheat application rate.
5. A survey from the PROBITY project has revealed that 82 per cent of farmers are positive about the use of gene editing in crops and 78 per cent would consider growing them on their farm within 5 years. PROBITY – A Platform to Rate Organisms Bred for Improved Trait and Yield is a 3-year farmer-led project run by the British On-Farm Innovation Network.
6. According to Defra, the average Briton consumed 37g of peas per week in 2025, down from 144g per week 50 years ago. Further, according to Choose British Peas, only 57 per cent view frozen peas as a classic British food, down to 24 per cent among 18-24-year-olds while only 33 per cent of Gen Z associate peas with Britain at all.
7. In support of strip cropping, a paper published in the Journal of Applied Ecology has reported on a comparison of strip cropping and monoculture across 22 farms in the Netherlands in 2024. Strip cropped fields encompassed a variety in strip widths and number of crops and included conventional and organic systems. The survey identified 233,478 arthropods and analysed 17 herbivore taxa, including pest and non-pest herbivores and 12 natural enemy taxa. On average, herbivores and natural enemies increased by 33 per cent and 32 per cent respectively, compared to monoculture fields, across all taxa in cereals and by 74 per cent and 18 per cent respectively in potatoes. While potential pest herbivores increased in strip cropping, their predators increased more strongly resulting in more predators per pest herbivore (+27 per cent to 83 per cent).

8. The Agricultural Price Index for August shows increases of 15.6 per cent for wheat, compared to a year ago, 11.6 per cent for barley, 18.3 per cent for oats, 11 per cent for oilseed rape and 10.1 per cent for fresh vegetables, but falls of 31.9 per cent for potatoes, 2.3 per cent for forage plants and 6.4 per cent for fresh fruit. Compared to July, there were increases of 6.1 per cent for wheat, 6.1 per cent for barley, 12.6 per cent for oats, 1.3 per cent for oilseed rape and 9.4 per cent for fresh vegetables but falls of 12.3 per cent for forage plants and 10.6 per cent for fresh fruit.

9. A report from the Energy and Climate Intelligence Unit has suggested that British potato growers could face losses of £80 millions to £169 millions as a result of extreme heat and drought hitting crop yields. The losses in the UK are estimated to exceed 400,000 tonnes.

10. NFU Sugar and British Sugar have come to an agreement on the 2027/28 sugar beet contract. Contents include:

    - A one-year fixed price contract at £28.50/t for up to 50 per cent of the contract.
    - A one-year contract with a guaranteed base price of £25.50/t plus a market-linked bonus for up to 100 per cent of the contract and an index-linked contract for up to 50 per cent of it.
    - The market-linked bonus will be triggered when the average ex-works white sugar selling price exceeds £475/t with growers receiving 25 per cent of the excess.
    - The index-linked contract will derive its value from the No.11 raw sugar futures contract and the relevant £-$ exchange rate. The contract will begin at £25.50/t.
    - There will be yield protection, a 60-mile transport allowance for all factories or 75 miles for former Cantley growers; an interest-free cash advance option; a late delivery allowance and complimentary frost insurance.

11. A project led by Keele University and funded by Defra and UK Research and Innovation is seeking to protect the UK from bacterial plant diseases that are spreading across continental Europe. Planthoppers spread the diseases which threaten potatoes, sugar beet, carrots and grapevines.

12. The winner of the Tesco annual Agri-Tech challenge has been announced as Tornado, a sealing technology designed to strengthen plant resilience and protect crops, developed by Swiss agri-tech company AgroSustain. The technology forms as invisible barrier on the plant surface using edible ingredients, helping crops withstand challenging growing conditions including drought and salinity.

13. AH Worth has launched Tesco Finest Red Kale with deep purple-red leaves and a slightly sweeter flavour than traditional green kale.

14. A report from scientists at Deep Science Ventures has suggested that the nutritional value of fruit and vegetables has fallen by 50 per cent as a result of a decline in soil quality resulting in people having to eat twice the number than they would have done in the 1960s to get the same levels of minerals such as potassium, magnesium and copper. It further estimates that 5 million people in the UK on weight-loss treatments will be consuming too few minerals and vitamins.
15. Walsh Mushrooms, based at Bury St Edmunds, is to start growing organic mushrooms at its Suffolk site.
16. Soft fruit grower Place UK, based in Norfolk, has warned that the Government's approach to seasonal worker visas has created a cliff edge for the industry. The business employs 700 seasonal staff under a scheme that is set to run until 2030. The lack of any announcement about an extension is preventing investment.
17. Scientists at Wageningen Plant Research in the Netherlands have developed sensors which will enable growers to map the detailed requirements of individual trees in an orchard. Precision fruit cultivation is expected to make orchards more efficient and more sustainable. Trees with too much blossom can be sprayed to dry out the stigma of some of the flowers while those with little blossom can receive growth products. The whole process will be automated, will reduce costs and facilitate better harvest planning.
18. A study undertaken by Washington University in St Louis and published in Horticultural Research involved examining the genetics of Malus angustifolia, the Southern crab-apple, and revealed that it is 'filled with untapped genetic information'. The Southern crab-apple is resistant to fireblight and abiotic stressors meaning that it has evolved to thrive in conditions that commercial apple varieties struggle.
19. The University of Lincoln's Riseholme Park Campus has secured funding of £7.1 millions of which £4.8 millions will be to establish one of the UK's new Robotics Adoption Hubs. HARVEST will provide businesses access to robotics research, testing facilities and industry expertise.
20. A study at China's Shenyang Agricultural University has reported that melanonin-treated blueberries softened more slowly post-harvest and also accumulated less abscicic acid which is linked to blueberry softening. Treated fruit retained more insoluble pectin and contained less soluble pectin.
21. A study conducted at China's Nanjing Agricultural University has identified the gene which enables cucumbers to set without pollination. Parthenocarpy can help growers maintain yields when pollination is poor and will produce seedless fruit which is more highly valued by consumers. Applying plant hormones, such as brassinosteroids, can stimulate parthenocarpic fruit set.

22. UK agri-tech companies Fotenix and Leap AI have developed QualiCrop, an automated grading line designed to detect defective tomatoes and remove them from a moving conveyor belt.
23. Sweden-based Elleholms Tomatodling has reported a 13.2 per cent increase in tomato yields during a 6-month trial of hydromagnetic water technology using the UK-designed Magnostream Pro system.
24. Biobest has announced the market introduction of Polly, a pollination robot designed for tomato growers which operates alongside bumblebees. Trials have demonstrated yield improvements of 2-6 per cent.
25. A report from Strutt & Parker has highlighted the opportunities for farmers to move into the cut-flower sector. Across the UK there are now over 1,000 growers represented by Flowers from the Farm. Currently the industry is valued at over £33 millions a year but British flowers are also making inroads into the £14 billions wedding industry with a surge in demand for local, seasonable blooms. A small well-planned cut-flower enterprise has the potential to be a high-margin diversification that dovetails with sustainability goals and biodiversity incentives.

Other livestock news

1. A study involving scientists from Teagasc, Trinity College Dublin and Aarhus University has investigated improving grassland yields while reducing reliance on fertilizer with research taking place across 26 international sites as part of LegacyNet. Results show that sowing two grasses, two legumes and two herbs in roughly equal proportions produced a yield of 12.3t/ha. Compared to the grass monoculture treated with double the amount of nitrogen, this is an 11 per cent yield increase. Compared to the two-species grass-legume combination, the yield increase is 18 per cent.
2. Farmers Guardian has discovered that the Animal and Plant Health Agency may attempt to recover over £600,000 from 321 farmers who had received incorrect bovine TB compensation dating back to 2000.
3. The UK Ruminant Antibiotic Roadmap has been published. It aims to improve the collection and reporting of antibiotic usage data and includes guidance on mandatory data collection, centralised reporting by veterinary practices and pharmacies, and better use of farm-level information to support animal health planning.

4. Andersons has updated its Friesian Farm dairy model to include a forecast for the current year and a budget for 2027/28:

	2024/25 final ppl	2025/26 estimate ppl	2026/27 forecast ppl	2027/28 budget ppl
Milk price	42.9	41.7	37.0	41.0
Culls and calves	3.4	6.3	5.8	5.5
Total output	46.3	48.0	42.8	46.5
Variable costs	18.0	20.0	20.2	19.5
Overhead costs	17.2	17.4	19.0	18.9
Rent, finance and drawings	7.2	7.2	7.4	7.5
Cost of production	42.4	44.6	46.6	45.9
Margin	3.9	3.4	-3.8	0.6
BPS + SFI	2.5	1.9	1.5	0.8
Business surplus	6.4	5.3	-2.3	1.4

5. Innovation for Agriculture has reported on the launch of Sustainable Dairy Pathways: The Path to 2030, covering how the UK dairy sector can become more resilient and sustainable while continuing to produce safe, nutritious and affordable food. Three areas are of importance:
   - The largest investment will be in slurry and manure management systems, including slurry storage, covers, low-emission spreading equipment, separation technologies and related infrastructure.
   - Infrastructure and technology will only deliver benefits if the people using them have the right skills. Therefore, farmers and employers will need to invest in skills, training and good workplaces while processors and industry bodies can support training, leadership, wellbeing and career development.
   - Developments in nutritional science will show how the unique structure of dairy foods enhances nutrient absorption and improves health outcomes.
6. The European Commission has adopted its EU Livestock Strategy together with a new Protein Action Plan. Key points include:
   - Changes to livestock production, including moving pigs from crates to pen systems with a proposal due in 2027.
   - Measures to strengthen sector resilience including a dedicated risk-management scheme under the post-2027 Multiannual Financial Framework covering climate-related and animal disease risks.
   - An increase in the share of protein from EU-grown oilseeds and protein crops from 25.8 per cent in 2025 to 35 per cent by 2035.

7. Bluetongue cases in October occurred in Cheshire (2); Cornwall (8); Cumbria (7); Derbyshire (1); Devon (34); Gloucestershire (2); Greater Manchester (1); Lancashire (13); Leicestershire (2); North Yorkshire (7); Somerset (17); Northumberland (1); West Yorkshire (1); Shropshire (1); and Staffordshire (1).

8. According to AHDB, whole milk production has been severely impacted by heat stress in cows, while heatwaves have caused a number of secondary impacts:
   - Milk solids output has fallen as lower milk volumes outweighed marginal growth in milk composition.
   - Higher somatic cell counts and bactoscan levels highlight the negative effect of excessive heat on milk hygiene levels.
   - Heat related herd health challenges, disease risks and higher feed costs have added to the cost of production.

9. The Bluetongue Restricted Zone has been extended to cover the whole of Scotland.

10. According to AHDB, UK beef production is forecast to fall by 0.6 per cent in 2027 to 896,000 tonnes. Imports are expected to rise by 3 per cent with exports rising by the same amount. UK sheep production is forecast to fall by 2.4 per cent to 262,000 tonnes.

11. During September, with comparisons to a year earlier:
   - UK prime cattle slaughterings fell by 6.5 per cent to 160,000 head. Beef and veal production fell 5.4 per cent to 73,000 tonnes.
   - Sheep slaughterings fell by 5.3 per cent to 914,000 head. Mutton and lamb production fell by 3.7 per cent to 22,000 tonnes.
   - Pig slaughterings fell by 1.1 per cent to 890,000. Pig meat production fell by 0.2 per cent to 84,000 tonnes.

12. A survey of breeding companies covering the year to March 2026 has reported continued growth in the use of sexed semen with 91 per cent of Holsteins using sexed semen. There has also been an increase in the use of beef semen in dairy herds, 53.5 per cent of all semen used. At 42 per cent and 41 per cent respectively, Aberdeen Angus and British Blue remain the most popular beef breeds.

13. The Agricultural Price Index for August shows increases of 0.3 per cent for poultry, compared to a year ago, and 1.9 per cent for eggs, but there were falls of 7.1 per cent for cattle and calves, 14.7 per cent for pigs, 1.5 per cent for sheep and lambs and 17.3 per cent for milk. Compared to July, there were increases of 0.2 per cent for pigs, 3.5 per cent for poultry and 4 per cent for milk, but falls of 2 per cent for cattle and calves and 11.6 per cent for sheep and lambs.

14. Research into calf nutrition, published in Animal Journal, has suggested:

- Higher milk feeding improves calf growth, health and welfare.
- Milk replacers differ from whole milk in fat and protein quality.
- Nutrient balance across milk and solid feeds drives lifelong productivity.
- Fat structure and casein: whey ratio shape digestion and metabolism.
- Aligning weaning with solid-feed readiness boosts rumen development.

15. The June 2026 Agricultural Census has revealed that there were 1.67 million cattle in Scotland, up 0.7 per cent on 2025 but 1.3 per cent below the 5-year average. The increase was the first since 2021. Pig numbers grew by 4.9 per cent to 327,700 but were 1.2 per cent below the 5-year average. The increase was the first since 2022. Sheep numbers fell by 0.5 per cent to 6.5 millions, 22 per cent below the 5-year average, while poultry numbers fell by 4.4 per cent to 11.8 million birds.

16. During September, average butterfat rose by 3.4 per cent, compared to August, and by 0.6 per cent, compared to a year earlier, to 4.41 per cent. Average protein rose by 3 per cent, compared to August, to 3.54 per cent, but was unchanged on a year earlier.

17. Andersons has published the latest results and its forecast for Meadow Farm, a notional 154-hectare beef and sheep holding in the Midlands with pasture and wheat and barley grown for livestock feed. The farm has 60 spring-calving suckler cows; a dairy bull beef enterprise; and a 500-ewe breeding flock.

	2024/25 £/ha	2025/26 £/ha	2026/27 £/ha	2027/28 £/ha
Livestock margin	1,761	2,088	2,050	1,861
Crops margin	775	733	798	785
Overheads	650	734	816	771
Drawings	87	76	76	78
Rent and finance	256	259	266	272
Margin from production	-6	287	95	-44
BPS + SFI	298	225	225	121
Surplus	292	512	320	77

18. During August, with comparisons to July,

- Milk available to processors fell by 4.9 per cent to 1,167 million litres.
- Liquid milk production fell by 2.5 per cent to 473,600 litres.
- Cheese production fell by 4.8 per cent to 39,200 tonnes.
- Butter production fell by 2 per cent to 14,600 tonnes.

19. The Government has confirmed that sheep shearers and agricultural contractors remain excluded from the UK's Temporary Shortage List.

20. A survey carried out by the National Sheep Association has revealed that 65 per cent of sheep farmers plan to vaccinate their flock against bluetongue virus next year.

21. AHDB has launched new breeding values for Lleyn, Exlana, Wiltshire Horn, Romney, Easycare and Wool Shedding Composite sheep. The evaluation draws on more than 28,000 genotypes.

22. AHDB has morphed the 'Swaffham group' into the Outdoor Pig Environmental Risk Reduction Programme. The group includes representatives from major pork businesses, the National Pig Association and AHDB and a key focus will be generating practical evidence and insight that can be used to inform discussions with government agencies and policymakers.

23. The Animal & Plant Health Agency has published details of the pig population in Great Britain in 2024/25.

- The total number of pigs was 4,961,792, up from 4,826,086 in 2022/23.
- The number of holdings was 18,212, down from 31,663 in 2014/25 and 20,855 in 2022/23.
- In England, pig numbers rose from 4,353,754 to 4,453,786 but the number of holdings fell from 16,714 to 14,703.
- In Scotland, pig numbers rose from 410,863 to 454,814 but the number of holdings fell from 1,820 to 1,399.
- In Wales, pig numbers fell from 61,469 to 53,192 while holding numbers fell from 2,321 to 2,210.

24. AHDB has appointed London Economics to undertake an impact assessment of an outbreak of African swine fever in Great Britain. Key areas of work will include:

- Assessing the impact of an outbreak where regionalisation agreements are not in place.
- Company outcomes where regionalisation agreements are recognised by trading partners.
- Evaluating the differing impacts of outbreaks including feral wild boar and domestic pigs.
- Examining the feasibility, requirements and practical implications of compartmentalisation.
- Assessing how compartmentalisation could change the economic impact of an outbreak.

25. The first avian influenza H5N1 case of the season has been detected in commercial poultry at Belford, North Northumberland. The first case in Scotland was found in commercial backyard poultry on the Isle of Lewis.

26. A study by researchers at Queen's University Belfast and LGC Group published in Poultry Science, has suggested that processed animal proteins could reduce the environmental impact of chicken production. At inclusion rates of 10 and 15 per cent, it reduced modelled greenhouse gas emissions, land use and water consumption per 1000kg of chicken carcase produced. The main drawback was on increase of 7-8 per cent in terrestrial acidification, an environmental impact associated with emissions including ammonia. However, it could be a useful alternative to soybean meal.

27. In the 3 months to September:

- 268 million dozen eggs were produced for human consumption, unchanged on last year and down 1.4 per cent on the June quarter.
- The average farm-gate price was 153p per dozen, up 3.8 per cent on 2025 and 0.1 per cent on the June quarter.
- The production of egg products was 19,200 tonnes, up 11.9 per cent on 2025 but down 1 per cent on the June quarter.

28. During September, with comparisons to a year earlier:

- UK commercial layer chick placing rose by 12 per cent to 3.4 million chicks.
- Broiler chick placings fell by 0.1 per cent to 95.9 million chicks.
- Turkey poult placings rose by 85 per cent to 1.5 million chicks.
- Turkey slaughterings rose by 26 per cent to 700,000 birds.
- Broiler slaughterings rose by 3 per cent to 98.4 million birds
- Poultry meat production rose by 6.7 per cent to 182,100 tonnes.

29. Since mid-September, a further 7 outbreaks of Newcastle Disease have been reported in Hungary, 5 outbreaks in Spain and 2 in Poland.

VIII Inputs/Supply businesses

1. Research at Rothamsted, as part of the NICCEE (Global Nitrogen Innovation Centre for Clean Energy and Environment) Global Centre programme, has suggested that implementing improved nitrogen management practices could reduce energy-related CO_2 – equivalent impacts by 8.8 – 13 per cent. Having modelled current energy use across a variety of farm types, the researchers found that implementing a range of best-practice nitrogen management measures reduced the indirect energy use associated with fertilizers by 16-40 per cent. The research also found that fertilizer production is a major contributor to farm energy use footprints with embedded emissions associated with fertilizers on farms without livestock accounting for 39-47 per cent of energy-related impacts.
2. Ahead of the introduction of the Carbon Border Adjustment Mechanism, a levy on carbon emissions in the supply chain of imported goods, HM Revenue & Customs has published a proposed rate of £1.45 per tonne of carbon dioxide equivalent for fertilizer.

3. Defra has announced that select fertilizer tariffs will be cut by 2 – 6.5 per cent from 26 November. However, the NFU has said the cuts are likely to be of 'minimal' benefit to farm businesses. The AHDB has reported that UK-produced Ammonium Nitrate is up 20.5 per cent on pre-Middle East conflict levels while the imported product is up 21.3 per cent.

4. The British Survey of Fertiliser Practice 2025 has published figures on a nutrient dressing cover for all crops and grass:

	All crop			All grass			All crops and grass		
	2024	2025	+/-	2024	2025	+/-	2024	2025	+/-
Total Nitrogen									
Application rate (kg/ha)	121	127	6	34	42	8	73	79	6
5-year average (kg/ha)	123	124	1	42	40	-2	78	77	-1
Dressed crop area (%)	87	88	1	42	48	6	62	65	3
Field rate (kg/ha)	139	145	6	82	87	5	118	121	3
Total Phosphate									
Application rate (kg/ha)	17	16	-1	4	5	1	10	10	0
5-year average (kg/ha)	19	18	-1	5	5	0	12	11	-1
Dressed crop area (%)	35	31	-4	21	24	3	27	27	0
Field rate (kg/ha)	49	52	3	19	20	1	36	36	0
Total Potash									
Application rate (kg/ha)	22	22	0	6	2	2	13	14	1
5-year average (kg/ha)	25	24	-1	8	-1	-1	16	15	-1
Dressed crop area (%)	38	35	-3	22	4	4	29	0	1
Field rate (kg/ha)	60	63	3	28	2	2	46	47	1
Total Sulphur									
Application rate (kg/ha)	29	31	2	4	2	2	15	17	2
5-year average (kg/ha)	29	29	0	4	1	1	15	15	0
Dressed crop area (%)	57	60	3	13	2	2	32	34	2
Field rate (kg/ha)	51	52	1	34	3	3	47	48	1

5. The Agricultural Price Index for August shows a fall of 0.7 per cent for veterinary services, compared to a year ago, but increases of 0.7 per cent for seeds, 23.3 per cent for energy and lubricants, 13 per cent for fertilizers, 47.6 per cent for chemicals, 5.9 per cent for animal feedingstuffs, 4.5 per cent for equipment maintenance and 6.4 per cent for buildings maintenance. Compared to July, there were falls of 0.2 per cent for veterinary services and 1.4 per cent for equipment maintenance, but increases of 0.1 per cent for seeds, 9.4 per cent for energy and lubricants, 0.7 per cent for fertilizers, 2.4 per cent for chemicals, 1.4 per cent for animal feedingstuffs and 0.4 per cent for buildings maintenance.

6. As a consequence of the decline in the authorisation of fast-acting crop protection products for use in fruit, Niab's Cropping Systems team, as partners in an EU-funded project entitled 'AgroBioConnect: Connections in the landscape' has published' the role of landscape complexity in agroecosystem sustainability.' The general objective is to examine how the landscape surrounding strawberry crops influences beneficial organisms and the project has measured the response of aphid parasitoid wasps that deliver pest control and wild bees that pollinate crop. While the data is being analysed, 7 of the participating strawberry growers provided their views on certain aspects:
    - The surrounding landscape is now seen as a source of pest control with newer fruit farms designed with biological control in mind, incorporating flowering hedgerows, woodland, grassland and ponds.
    - Creating connecting corridors of wildlife and beneficial insects is essential.
    - It is considered difficult to assess the financial impact of beneficial landscape measures and there is concern that they could be scaled back in times of economic hardship.
    - Growers would like to increase biodiversity event to the extent of employing an additional person to be responsible but financial constraints may prevent this and it is felt that more practical guidance is needed.
7. The Fertilizer Industry Assurance Scheme has introduced the FIAS 2026 Standard with effect from 1 October. The updated standard reflects changes in legislation, audit findings and industry practice identified since the last review in 2021.
8. BASF has launched Apthena a biological product to enhance natural aphid control by attracting predators. The product contains (E)-P-farnesene, a natural pheromone released when aphids are disturbed.
9. Saga Robotics has been named in Time's List of the Best Inventions of 2026 for Thorvald, its autonomous agricultural robot. The system has treated 30 per cent of the UK's tabletop strawberry production by 'Farming with Light.' Operating at night'. Thorvald uses UV-C light to control powdery mildew and other diseases thereby replacing chemical fungicides. It can also capture images that growers use for crop forecasting. Thorvald was initially developed at the Norwegian University for Life Sciences.
10. SilviBio, based in Livingston, is to open its first production facility producing growing media sourced entirely from UK-sourced materials including sheep wool. The media is estimated to cut emissions by 90 per cent compared with peat and by 50 per cent compared with some peat-free alternatives.
11. UPL has received approval for Plantivax for use on strawberries and outdoor cane fruit. It contains laminarin which mimics the degraded cellular material released from a fungal attack and stimulates the nearby cells' defence systems. Approval has also been given for Carpovirusine Ultra which is designed to control codling moth and plum moth.

12. Edward's Seaweed Fertilizer UK has achieved certification from Organic Farmers & Growers for its Edwards Advanced Seaweed Fertiliser.
13. Evesham-based BHGS Ltd, a supplier and distribution of horticultural products, has entered administration.

Marketing

1. Data has been published on UK trade in food, feed and drink in 2025:
    - Exports totalled £25.7 billions, 5 per cent up on 2024. However, after adjusting for trade price inflation, exports were down 0.89 per cent and down 16 per cent pre-EU exit.
    - In real terms, exports of oilseeds rose 30.4 per cent to £58m, oils and fats 11.3 per cent to £766m, animal feed by 7.7 per cent to £1,280m, dairy and eggs 7.3per cent to £2,505m, coffee, tea etc. 6.8 per cent to £2,071m, cereals 5.2 per cent to £2,516m and meat 2.9 per cent to £2,363m. However, there were falls of 8.1 per cent for fish to £1,988m, 7.6 per cent for fruit and vegetables to £968m, 7 per cent for sugar to £424m, 5.4 per cent for beverages to £8,192m and 4.6 per cent for miscellaneous edibles to £2,593m.
    - Imports totalled £67.8 billions, up 6 per cent on 2024 and 44 per cent on 2018 pre-EU exit. After adjusting for trade price inflation, imports were up 5 per cent and 3 per cent respectively.
    - In real terms, imports of coffee, tea etc. rose by 17.6 per cent to £7,552m, fish by 11.3 per cent to £3,739m, oilseeds by 10.6 per cent to £1,059m, meat by 9.4 per cent to £9,314m, dairy and eggs by 6.4 per cent to £4,576m, animal feed by 3.8 per cent to £3,504m, oils and fats by 3.6 per cent to £1,990m, fruit and vegetables by 3.1 per cent to £15,049m and cereals by 2.7 per cent to £7,046m. However, there were falls of 7 per cent for sugar to £1,795m, 4.1 per cent for miscellaneous edibles to £4,674m and 0.8 per cent for beverages to £7,470m.
2. In the 4 weeks to October, UK grocery inflation increased to 2.5 per cent, up from 2.3 per cent in the previous month.
3. In the 12 weeks to 4 October, Lidl increased sales by 7.1 per cent and now has an 8.6 per cent market share. Ocado grew sales by 12.4 per cent and M&S by 14.9 per cent.
4. The Quality Meat Scotland 2026 export survey shows that red meat exports in the year to July rose by 25 per cent by volume and by 10 per cent by value to £190 millions, the fourth consecutive year of increase. The EU accounted for 99 per cent of exports by value and 97.5 per cent by volume.
5. In the 12 weeks to 4 October, with comparisons to a year ago:
    - Beef volume sales fell by 0.4 per cent although spend increased by 1.4 per cent.
    - Steak volumes grew by 7.9 per cent with sirloin up 21 per cent.

- Processed beef grew by 4.5 per cent with burgers up 10.2 per cent and sausages 12.5 per cent.
- Added-value grew by 2.9 per cent with marinades up 1.48 per cent.
- Lamb volumes fell by 11 per cent and spend by 3.9 per cent.
- Primary cuts fell by 14 per cent.
- Lamb mince grew by 3.1 per cent and stewing lamb by 18.2 per cent.
- Processed lamb fell by 12.3 per cent but added-value increased by 10 per cent.
- Pig meat volumes fell by 2.1 per cent with spend down 1.1 per cent.
- Primary volumes rose by 1.1 per cent with belly up 10.7 per cent, mince up 13.6 per cent and steak up 2.8 per cent.
- Processed volumes fell by 4.4 per cent with bacon rashers down 8.1 per cent and sausages 5.3 per cent.
- Added-value volumes grew by 7.3 per cent with sous vide up 11.3 per cent and marinated 8.4 per cent.

6. The Autumn Budget has removed a raft of tariffs on imported food. Duty at a rate of 16 per cent has been removed on plantains and citrus fruits at 12 per cent, frozen fruit at 20 per cent, sweet peppers and capsicum at 6 per cent, figs and avocados at 4 per cent and 10 dried fruit lines at between 2 and 8 per cent. The cost to the Exchequer is estimated to be £75 millions in 2027/28.

7. According to British Apples & Pears Ltd, Aldi recorded the highest volume of British apple sales in September at 2,000 tonnes, 22 per cent of the total compared to its market share of 11 per cent. Aldi was followed by Lidl at 1,750 tonnes, 20 per cent of the total compared to its market share of 9 per cent, while Tesco sold 19 per cent of the total compared to its market share of 28 per cent. Asda achieved sales of 6 per cent, compared to its market share of 11.5 per cent; Morrisons recorded sales of 4.5 per cent, compared to its market share of 8.5 per cent; and M&S sold 2 per cent of the total, compared to a market share of 4 per cent.

8. Data from Worldpanel by Numerator UK OOH covering red meat foodservice performance in the year to 6 September reveals:

   - Beef volumes fell by 2.9 per cent with takeaways registering a 6.9 per cent fall.
   - Beef burger volumes increased by 3.3 per cent while Asian dishes grew by 9.2 per cent. However, there were falls of 0.8 per cent for Italian, 13.2 per cent for meat-centred meals, 11.3 per cent for savoury pastry and 28.5 per cent for Mexican.
   - Volumes of lamb fell by 9.3 per cent with kebabs down 8.2 per cent, Indian 7.8 per cent and meat-centre meals 11.5 per cent. In contrast, Asian volumes grew by 1.2 per cent.
   - Volumes of pig meat fell by 5.5 per cent, possibly caused by average price increases of 6 per cent.
   - Savoury pastries fell by 11.4 per cent, sandwiches 1.1 per cent, breakfasts 5.6 per cent, pizza 6 per cent and meat-centred meals 8 per cent. However, Italian grew by 17.9 per cent, Asian 7 per cent and Indian 5.9 per cent.

9. Global consumer and shopper insights company Worldpanel by Numerator has launched its Enhanced Panel to expand its panel of UK shoppers from 30,000 to 55,000. The expansion will also capture more behaviour per shopper.
10. Aldi is recruiting 600 staff for its new distribution centre in Bardon, Leicestershire which is set to be the largest in the UK.
11. Asda has announced a decade-long partnership with Len Wright Salads worth £25 millions per year. Len Wright Salads is a family-owned business based in Lancashire growing, processing and packaging a wide variety of fresh outdoor and protected salad crops. It supplies the majority of Asda's own label prepared bagged salads, with 37 million bags distributed each year.
12. Industry campaign Veg Power and charity The Food Foundation have launched a 'Feel the Fibre' campaign as 86 per cent of primary school-age children do not meet their 20g daily fibre target. A nationwide 'Discover Beans' schools programme will provide children with a toolkit of materials and resources including curriculum-supportive lesson plans, activities and presentation. The new campaign is part of the wider Bang in Some Beans campaign which has seen UK bean and pulse sales increasing by 7.3 per cent in the first quarter of 2026 compared to a year earlier.
13. Surplus veg box scheme Oddbox has 'rescued' 14,400 pumpkins, 20 tonnes of kabocha squash, 7.8 tonnes of butternut squash and 7.275 tonnes of Crown Prince squash, all of which had been rejected by UK retailers for being too small.
14. The Watercress Company has launched a direct online ordering facility for fresh watercress with next-day delivery.
15. A survey of 4,000 adults, by home appliance brand AEG, as part of its campaign Food for thought: The Waste Less Index, has revealed that salad leaves top the most-wasted foods list, followed by bread, potatoes, bananas and carrots. 52 per cent blame food for going off too quick while 25 per cent cite overbuying and poor meal planning. 48 per cent were aware of their wasteful habits and only 10 per cent made a conscious effort to avoid food waste entirely. The research also revealed that 1 in 6 are unable to tell the difference between sell-by, use-by and best-before dates.
16. Aldi has launched Grounded in Goodness in partnership with ABP. This will offer premium payments to about 1,000 beef farmers across the UK who are committed to implementing on-farm actions to improve soil health, biodiversity and animal welfare.
17. Veg Powers' Better with Butternut campaign has been launched in association with Barfoots, Sakata and Waitrose.

Miscellaneous

1. Data has been published on the Nutritional Supply of Agriculture in the UK in 2025 showing how much of the requirements of the UK population is supplied by home-grown produce:

   - Energy, in the form of kilocalories, was supplied with 101 per cent of the needs of the population with 54 per cent from cereals, 16 per cent from vegetables, 0.3 per cent from fruit and 31 per cent from livestock products.
   - Protein, where the average requirement is 46 grams per day, was supplied with 193 per cent of the needs of the population with 76 per cent from cereals, 9 per cent from vegetables, 0.2 per cent from fruit and 10.8 per cent from livestock products.
   - The average carbohydrate requirement is 280 grams per day. The supply was 116 per cent of the population's needs, with 75 per cent from cereals, 30 per cent from vegetables, 1 per cent from fruit and 10 per cent from livestock products.
   - Fibre requirement is, on average 28 grams per day. The supply was 104 per cent of the population's needs with 84 per cent from cereals, 18 per cent from vegetables and 1 per cent from fruit.
   - As regards micronutrients, the supply provided 134 per cent of the calcium requirement, 112 per cent of the iron requirement and 134 per cent of the Vitamin C requirement.

   Overall, what UK farmers produce is broadly equivalent to the country's nutritional needs.

2. An NFU survey on fly-tipping has revealed:

   - 49 per cent of farmers believe fly-tipping has worsened over the past 5 years.
   - 51 per cent have experienced small-scale fly-tipping on their land, while 29 per cent have experienced it on a large scale.
   - 12 per cent of those affected have experienced perpetrators being confrontational, violent or intimidating.

   The NFU has called for a single reporting mechanism, greater awareness of waste responsibilities, consistent partnership working and effective punishment to deter illegal dumping.

3. The Hawkstone Choir, originally a group of farmers brought together in 2025 as part of advertising campaign for Jeremy Clarkson's Hawkstone drinks brand, has been awarded the Farming Champion of the Year award.

4. The latest NFU Farm Fires Report shows that, in 2025, tractor fires cost £16.1 millions while combine harvester fires cost £4.8 millions. The total cost of fire damage was £118 millions, up from £102 millions in 2024. The worst regions were the East at £23.9 millions and the South West at £18.2 millions. Wales, at £6.2 millions, and the Midlands, at £6.7 millions, fared the best.

5. EmpowerAg has teamed up with AHDB Beef & Lamb to run a series of workshops across England on the matter of conversations that most farming families keep putting off. The workshops are run by Amy Hughes, a Yorkshire farmer's daughter who is now a qualified mediator. Each workshop is restricted to a maximum of 20 people and will cover how to handle difficult conservations and disagreements without them blowing up; why people resist change and what to do about it; and how to get the family and staff pulling the same way. A place can be booked at www.tickettailor.com/events/empowerag. Priority will be given to beef and sheep farmers.
6. McDonald's Progressive Young Farmers Programme has opened for 2027/28 applications. The programme offers a paid 12-month placement, providing experience across every stage of the McDonald's supply chain. Successful applicants will work alongside farmers, suppliers and industry exports and will travel throughout the UK and Ireland, visiting farms, processing sites and supplier facilities. They will be mentored by suppliers to McDonald's, including Pilgrim's Europe, Kepak, Dawn Meats, Cranswick, McCain, Kinisla, Noble and The Lakes, Arla and OSL. Applicants must be full-time undergraduates at college or university.
7. A report from the Food Foundation has suggested 750,000 people from low-income families are missing out on the Healthy Start scheme because of strict eligibility criteria. A number of organisations, including Sainsbury's and Co-op, have called on the Government to extend the scheme to all pregnant people and children whose parents are on Universal Credit and increase the age bracket to all children under 5.
8. Lidl is to distribute 1,500 £100 vouchers to primary schools to enable teachers to purchase fresh fruit and vegetables for pupils to sample in lessons. Lidl is also extending its Lidl Foodies programme to children aged 8 to 11. The programme gives teachers access to 20-minute lesson plans, interactive classroom activities and digital guides focusing on sustainable farming, reducing food waste and the Planetary Health Diet.
9. Tesco's Free Fruit & Veg scheme has entered its third year. In partnership with the British Nutrition Foundation, the scheme provides 1,000 schools with daily free fruit and vegetables. Those children taking part have benefited from an average 4.2 per cent increase in Vitamin C intake, 1.7 per cent Vitamin A intake, fibre up by 2.1 per cent and folate up by 1.8 per cent. 94 per cent of their teachers report improved behaviour, sharper focus and more energy in the classroom.
10. It is not just machinery and livestock which are a target for rural thieves. Winbirri Vineyard in Norfolk lost 500kg of Bacchus grapes, stolen off the vines.

11. The Animal and Plant Health Agency, in partnership with Springpod, has launched its first-ever work experience programme, providing young people with an opportunity to explore careers that help protect animal and plant health. A new virtual programme showcases careers in science, laboratory diagnostics, veterinary services, data analysis, inspection, operational delivery, policy and environmental protection. The programme is designed for students aged 13 and over and includes more than 10 hours of content.
12. A partnership comprising Wales Farm Safety Partnership and the Emergency Medical Retrieval Transfer Service is encouraging farmers and farm workers in Wales to attend the new Tractors and Trauma workshops to receive training in how to respond when unexpected incidents occur on the farm. Topics covered include:
    - CPR and Basic Life Support.
    - Management of catastrophic bleeding.
    - Responding to crush injuries.
    - Treating burns injuries.
    - Managing emergencies in remote rural locations where help may be delayed.
13. Sainsbury's has reintroduced its Healthy Start Scheme top-up whereby eligible customers will be able to apply for an additional £3 per week to spend on fruit and vegetables in the 6 weeks from 18 November.
14. Defra is to make £10 millions available to 45 local authorities identified as having the greatest level of deprivation and childhood obesity to develop solutions that meet local needs such as community food shops, mobile greengrocers, lunch clubs, community kitchens, and cooking and nutrition programmes.
15. Veolia has opened this year's Orchard scheme, inviting schools and community groups to apply for either 5 fruit trees or 10 strawberry plants. The scheme is available in areas in which Veolia operates and is open until 20 November.
16. Dr Oliver Doubleday has stepped down as Chair of The East Malling Trust after 8 years in the post. He is succeeded by Kevin Attwood.
17. Ronan Hughes, managing director of Origin Enterprises' Ireland and UK agricultural division, has been appointed as chair of Agricultural Industries Confederation.
18. Mark Shepheard has replaced Keith Leddington-Hill as Managing Director of Laurence Gould Partnership.

Postscripts

1. What do you call a miserly manta ray? A cheapskate!
2. I was sitting in a Chinese restaurant last night and it suddenly went dark. The waiter came over and said: "You all need to start clapping." 'What a weirdo' I thought. Anyway, we all started to clap and the lights came on! I said: "How did that happen?" He replied … "Old Chinese proverb, many hands make light work."
3. A man walks into a bar … The bartender says, "Why the long face?" The man replies "I just found out my wife is sleeping with another man. I've decided I'm going to drink myself to death." The bartender looks shocked and says, "I'm sorry I can't help you kill yourself." The man asks, "Well what would you do in my situation?" The bartender puffs himself up a bit and says ,"If I found out a guy was sleeping with my wife I wouldn't sit around feeling sorry for myself, I'd kill the guy." The man jumps up from his stool and shouts "That's a great idea! Thanks!" and runs out of the bar.

   A couple of hours goes by and the bartender is starting to get nervous when the man walks back into the bar with a smile on his face. "Did you kill the guy" the bartender asks nervously. "No! I slept with your wife. Whisky please."
4. What spell did Harry Potter use to fight of Dementors at the Strait of Hormuz? "Expectno! Petroleum".
5. Upon opening his new store, a man received a bouquet of flowers. He became very dismayed after reading the enclosed card. 'Our Deepest Sympathies'. Suddenly, his phone rang. Surprisingly, it was the florist calling to apologise for having sent the wrong card with the flowers. "Oh, it's alright," said the shopkeeper. "I'm a businessman and I understand how these things can happen." "But", added the florist, "I think I accidentally sent your card to a funeral party." "I'm sure it's no big deal. What did it say? asks the storekeeper. "Congratulations on your new location."
6. At first, my new tea shop attracted a lot of customers and business was great. Business was so good, I found that I would often run out of certain varieties of tea before the next delivery arrived. To avoid taking items off the menu, I began re-using some tea bags to prevent running out. Even after my deliveries were sorted out, I noticed how much money I saved by re-using tea bags. But soon, customers grew tired of weak tea and began to stop coming. Eventually I had to close my shop.

   This is when I realised that honest tea is the best policy.

You may be doing this without knowing!

The Royal Agricultural Society of England has recently highlighted the fact that agriculture is a poor beneficiary of Research & Development expenditure tax relief.

The R&D system as a whole has endured considerable dispute in recent times as a result of numerous spurious claims lodged by so-called specialist advisors who have often behaved in a similar manger to 'ambulance chasers.' This has resulted in a tightening of the system and has led to many detailed enquiries by HM Revenue & Customs as to the legitimacy of claims.

For a claim to be eligible:

- It must be made by a corporate entity.

It must seek an advance in science or technology that:

- Is significant in the sector.
- Cannot be readily deduced by a competent professional.
- Involves some degree of technical uncertainty.
- Features work conducted during the financial year.

The range of options available to agriculture include:

- Undertaking in-house agronomy trials. For example, experimenting with soil nutrition enhancement, trialling application methods and timing as well as the composition of slurry to determine the effects on soil nutrient balance and yields.
- Conducting seed trials – the effects of environmental stresses on seed varieties and examining Nitrogen application rates.
- Aiming to be peat free – developing and trialling peat free growing substrates.
- Glasshouse trials – exploring varietal performance, irrigation strategies, environmental controls and growing techniques.
- Bioengineering work – charging the way animals or crops are fed.
- Soil quality - removing forever chemicals.
- Utilising AI systems – improving water management.
- Hydroponic systems – the impact of climate change.

If you think you qualify, speak to your professional adviser about the implications of making a claim.

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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If you would like to add a friend or colleague's name to the mailing list please contact Lindsay Gleed.

The MFU was edited from 1991 to 2006 by John Nix, Emeritus Professor of Farm Business Management at Imperial College London.

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