

Market Report

August 2025

Procurement
Partners



Overview

We are now at the height of UK summertime and experiencing the extremes that the British weather can offer. Parts of England have faced the fourth heatwave of the summer with temperatures hitting above 30 degrees in some areas. Some regions of Southern Europe have been battling wildfires and we shouldn't forget the impact this can have on product availability and logistics. We are fortunate to get relief from home grown produce throughout the summer months but it does not escape the effects of the hot weather here. As we slowly head towards autumn we will once again become reliant on European sources, and some of these will start to filter in early due to pressures in the UK markets.

Despite some of the challenges across the market we expect food prices to stabilise across the rest of 2025. Continued inflationary pressure across other input costs, such as labour and transport will likely keep prices higher than in recent years.

The **UK inflation** rate rose to **3.8 %** for the month of July according to the Office of National Statistics; with the food index jumping to **4.9%** for July, 0.4 percentage points higher than it was in June.

Our report will take you through the most recent developments in each category.

Reach out today and find out how our team can help save you money on your food purchases - hello@procurement-partners.co.uk



Meat & Poultry

- **Beef** prices in the UK have continued to rise this month, with average prices up by around 8-12% compared to August 2024. The cost of premium cuts (such as sirloin, ribeye, and fillet steaks) has risen sharply, while lower-cost cuts like mince and stewing beef have also seen price hikes as cheaper alternatives are sought out. Demand remains very high, driven by the attractive export market where UK beef can demand a higher price for farmers.
- **Lamb** pricing continues to buck market trends remaining higher than previous years. Poor grazing conditions are thought to have contributed to lower quality and slower maturing periods. Prices have some what stabilised this month but at elevated levels.
- **Chicken** is seeing price increases on average of 5% this month with corn fed up by c.20% - increased feed costs being the biggest contributor. A combination of low stocks and high demand, driven by BBQ season, has seen prices continue to rise.
- **Turkey** prices show no signs of slowing down towards the festive season, suggesting elevated pricing this year – some reports suggest around 15-20% higher than 2024. Frozen stocks are limited due to reduced availability so demand will be tight. Consider locking in your festive volumes now to avoid disappointment.
- Finally, the **grouse** season commenced on 12th August (the Glorious Twelfth) and extends right through to December. Consider this seasonal favourite to mix up menus this summer.



Seafood

- August is a good month for UK seafood varieties however we continue to see big swings in pricing and demand as consumers switch between species to seek out value for money and replace old favourites.
- **Native lobster** is full flow and we are the price beneficiaries of this. Pricing is coming down by around 8-10% this month. Scottish **monkfish** has risen from a 4 MSC rating to 2 which is welcome news in the seafood market where whitefish price increases and shortages continue to dominate the market. That said, prices remain firm as demand switches into this species, anywhere up to 5% increases this month.
- Further bad news for **cod** and **haddock** sees prices continue to rise. Icelandic quotas were running extremely low (as of the end of July) which has impacted supply and quality and will continue to do so throughout the month. We have seen increases of up to 15% this month.
- **Hake** pricing has remained stable this month despite increased demand.
- **Salmon** prices and availability seem to be stabilising again this month and further smaller reductions in pricing are coming through - up to 5% in some cases. **Sea trout** remains a good and sustainable alternative at a lower price point.
- **Mackerel** as a species is struggling and most UK (and European) fisheries have been downgraded from a 3 to 4 in sustainability ratings. Hook and line caught from select fisheries still remains a 3 but availability is both limited and costly.



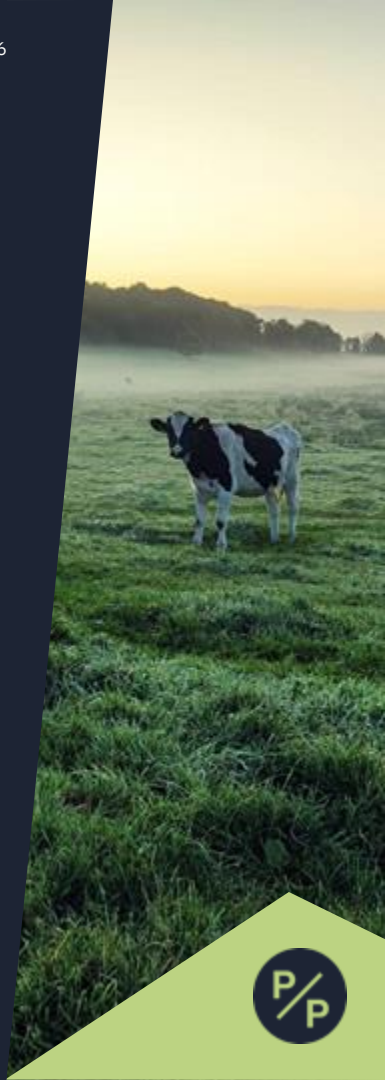
Fruit & Veg

- The **fruit, vegetables and salad** category has been hit hard this month with extreme temperatures both here and in Europe, as well as some origin changeovers between the southern and northern hemispheres. There are however still some new season arrivals to be had from the UK that are plentiful and great quality.
- UK **cherries** are in full swing but the season is short so grab them while you can. UK **plums** are expected to hit mid month. **Nectarines and peaches** will likely end early due to extremely hot weather in Italy and Spain but remain a great option; with price reductions of up to 20% still coming through this month.
- **Lemons** have experienced price increases this month due to a switch between the southern hemisphere and Europe. This is expected to be short lived - however prices have shot up by 50% in some cases. Similarly, **limes** are struggling with supply challenges out in South America.
- UK **tenderstem broccoli** succumbed to the July heatwave and is struggling to recover. Problems are expected to continue towards the end of August. Availability is being maintained with non-UK crop however this is causing prices to rise by anything up to 30%.
- **Salads and tomatoes** are faring well and we are seeing reductions in price of up to 25% across the category.



Dairy and Eggs

- The recent reductions experienced in spot market **milk** pricing have not filtered down into the other dairy commodities as expected. Prices remain firm across all categories and show no signs of softening. The recent heatwaves have done little to support the conditions required to raise stock or grow feed.
- **Milk** prices are stable this month but remain around 13% higher than this time last year. This trend is likely to continue for the foreseeable.
- **Butter** pricing remains equally high year on year and flat month on month. Due to a quiet trading period throughout summer for this commodity – there are some price benefits to be had by shopping around - by up to 10% in some instances. This will be short lived as demand returns and ramps up for the festive season.
- **Cream** saw around a 12% increase in wholesale pricing over the last three months resulting in around a 2% increase on average to the end product. This varies by supplier dependent on their upstream provider.
- Wholesale **egg** pricing is stabilizing as the industry recovers from recent outbreaks. We are yet to see any benefit to pricing but remain optimistic for the coming months. Those who are open to EU imported eggs may see benefits sooner as supply increases into the UK following recent trade deals in Europe.



Grocery

- **Chocolate** prices remain a talking point in the market this month due to their significant contribution to inflation. Prices remain up year on year at around 17% however we have not seen any month on month movements which suggest a stability albeit it at elevated levels. This may change as we move into the pre-Christmas period where demand will rise again.
- **Wheat** prices are easing slight this quarter with wholesale prices down around 5%; it is likely this will start to filter down into the supply chain in the coming months. This will tie into the wheat harvests that will get under way in the next few months. Given its global commodity status, prices do remain sensitive and volatile due to the producing countries that are involved.
- **Sugar** prices are expected to continue to rise as we head into the autumn months as the industry has seen lower production levels. It is anticipated that producers will look to recoup losses from previous seasons.
- **Chopped tomato** prices are forecast to increase from August / September time due to poor harvests, higher input costs and a sharp increase in tin prices, which have all contributed. Expect increases in the region of 5-10% in the coming months.

