

DAILY MARKET REPORT

MARKETS – DAILY COMMENTS & MARKET DRIVERS

On Monday, Aug-25 MATIF opened at €478 and traded between highs of €479.25 and lows of €471.25, before settling at €473.25, down €1.25 on Friday’s settlement.

- On the CBOT, all 3 legs of the soy complex settled lower yesterday. Jul’25 soybeans fell 8.2c to settle at \$10.33/bu, soy oil fell 0.61c to settle at 46.28c/lb, whilst soymeal fell \$2.4 to settle at \$293.9/t. **Price Impact – Negative**
- On the Bursa Malaysia, Jul’25 crude palm oil fell 51RM to settle at 3,891RM. **Price Impact – Negative**
- On the Dalian, Jul’25 soybeans gained 8CNY to settle at 4,119CNY, soymeal gained 16CNY to settle at 2,805CNY, whilst soy oil fell 48CNY to settle at 7,700CNY. **Price Impact – Mixed**
- Nearby (Aug’25) Brent crude gained \$1.85 to settle at \$64.63/b. **Price Impact – Positive**
- Brent gained nearly 3% yesterday as Alberta (the oil producing region of Canada) was hit by wildfires, affecting up to 7% of Canada’s total crude output. A sliding Dollar also supported prices on the day.
- Benchmark European natural gas gained 79c to settle at €35.02/MWh (Jul’25). **Price Impact – Mixed**
- Abares have cut their estimate for 25/26 Australian OSR production by 6% vs this season, to 5.7Mmt. However, this is still above the 5yr average of 4.8Mmt. **Price Impact – Mixed**
- Abares have cut their estimate for 25/26 Australian wheat production by 10% vs this season, to 30.6Mmt. However, this is still above the 5yr average of 27.6Mmt. **Price Impact – Mixed**
- US soybean plantings have reached 84% completion, up from 76% last week, 77% last year, and the 5yr average of 80%. However, estimates were over optimistic at 86% completion. **Price Impact – Mixed**
- US soybean conditions are running at 67% good-to-excellent, below estimates of 68%. **Price Impact – Mixed**

Hubbards Seeds – A United Oilseeds Company

Grass – Wildflowers – Game Cover - Maize – Cover Crops – Companion Crops – Trees/Hedging – SFI – Fodder

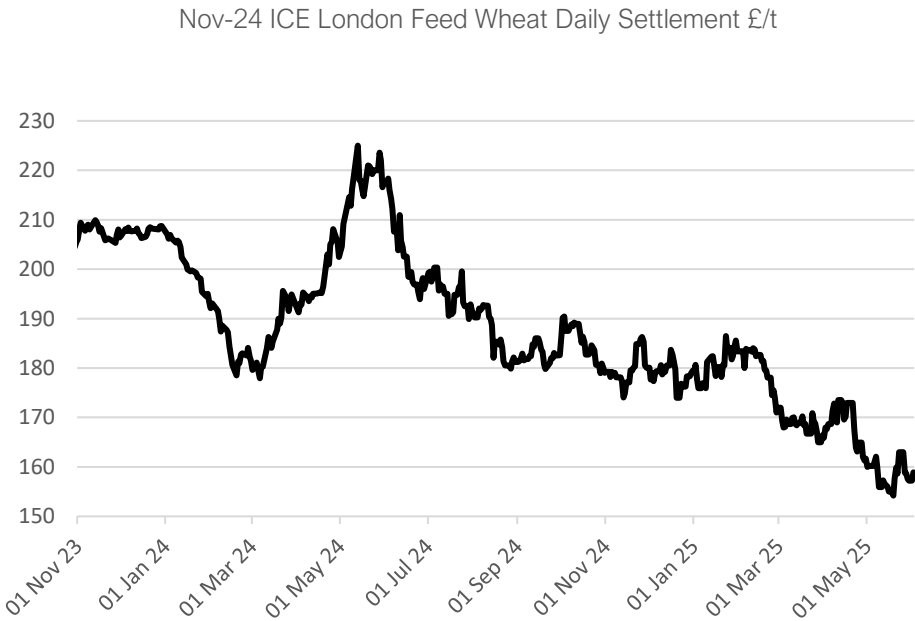
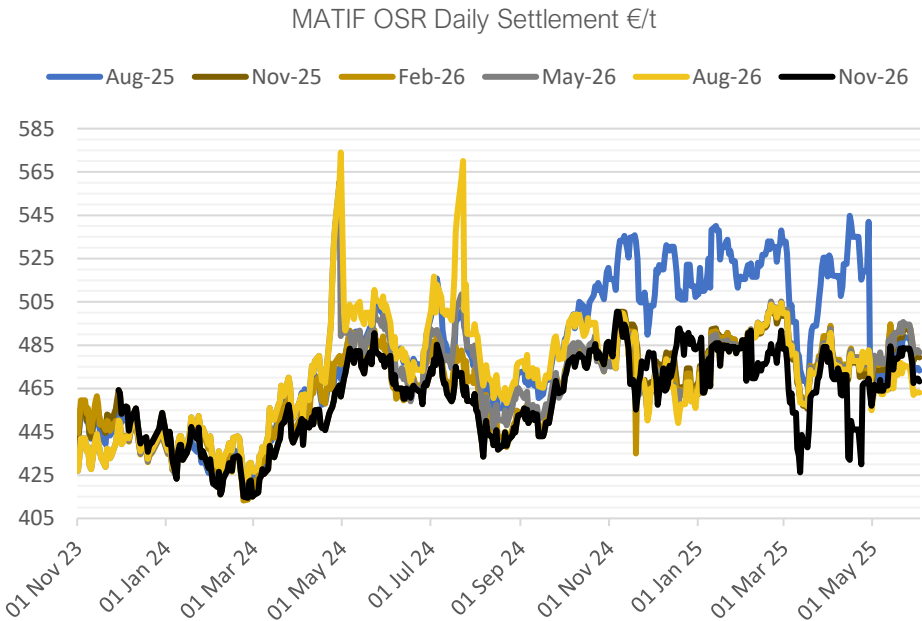
COMPETITIVE PRICING AND PROMPT DELIVERY

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| Delivered OSR Prices | Daily Change | Jun-25 | Aug-25 | Sep-25 | Oct-25 | Nov-25 |
|----------------------|--------------|--------|--------|--------|--------|--------|
| Erith                | £1           | £442   | £405   | £411   | £412   | £414   |
| Liverpool            | £1           | £440   | £405   | £411   | £412   | £414   |
| Chettisham           | £1           | POA    | POA    | POA    | POA    | POA    |
| Stratford            | £1           | £440   | £405   | £411   | £412   | £414   |
| Berwick              | POA          | POA    | POA    | POA    | POA    | POA    |
| Dundee               | £1           | POA    | £380   | £385   | £387   | £388   |
| Montrose             | £1           | POA    | £380   | £385   | £387   | £388   |
| Peterhead            | £1           | POA    | £384   | £389   | £391   | £392   |
| Inverness            | £1           | POA    | £380   | £385   | £387   | £388   |

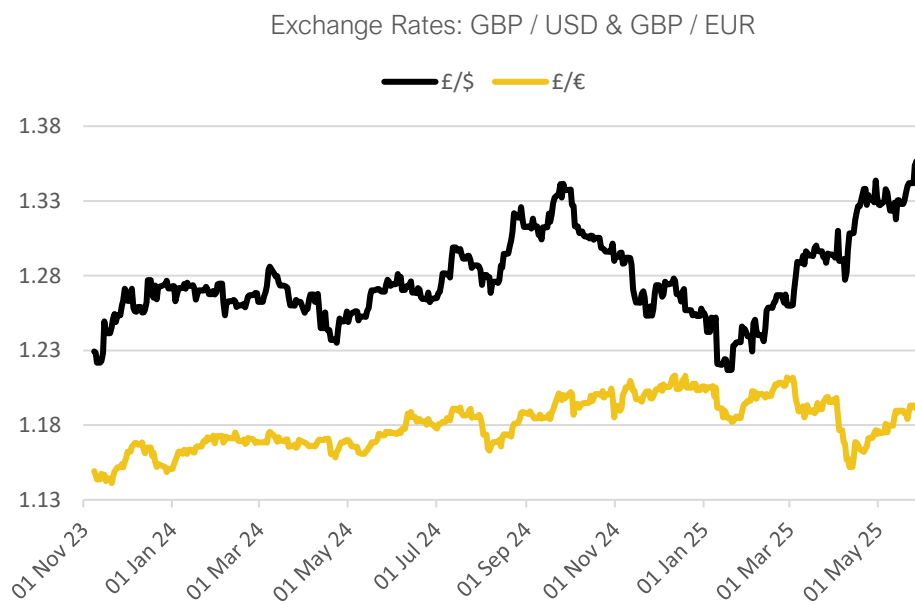
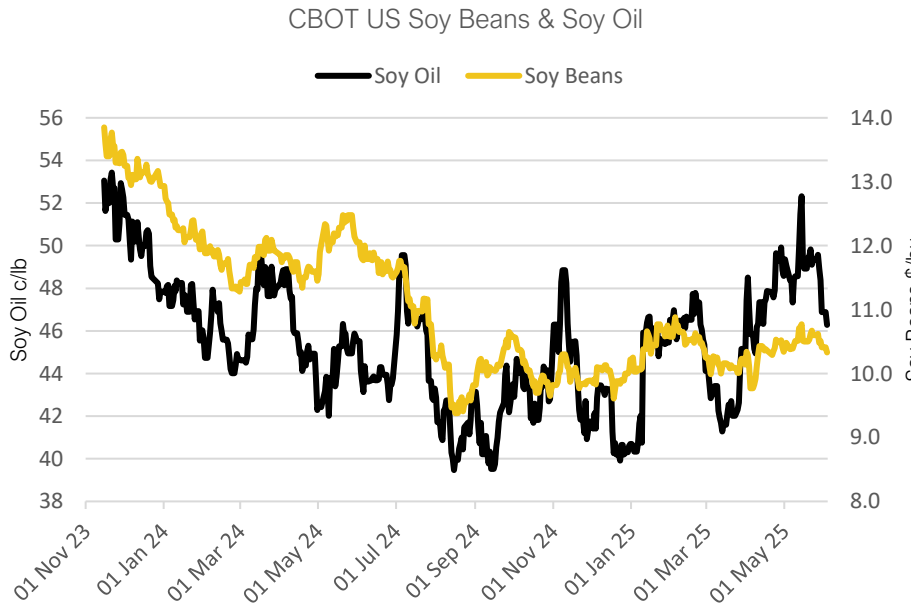


MARKET TRENDS & CURRENCY



| CBOT US Soy Complex – Settlement 02.06.2025 |         |        |              |
|---|---------|--------|--------------|
| Contract                                    | \$      | Month  | Daily Change |
| Soybeans (\$/bu)                            | \$10.33 | Jul-25 | -8.2c        |
| Soy Oil (c/lb)                              | 46.28c  | Jul-25 | -0.61c       |
| Soy Meal (\$/T)                             | \$293.9 | Jul-25 | -\$2.40      |

| ICE London Feed Wheat – Settlement 02.06.2025 |         |              |
|---|---------|--------------|
| Delivery Month                                | £/t     | Daily Change |
| Nov-25  | £179.90 | +£1.70       |
| Jan-26  | £183.70 | +£1.50       |
| May-26  | £191.30 | +£1.10       |
| Nov-26  | £191.50 | +£1.75       |



THE UNITED OILSEEDS OSR REBOOT

Restore UK OSR Self Sufficiency – Boost Economic Growth – Reverse Biodiversity Declines – Level the Playing Field for UK Farmers

SAVE OUR YELLOW FIELDS! – [View the Campaign Here](#)