



DAILY MARKET REPORT

MARKETS – DAILY COMMENTS & MARKET DRIVERS

On Thursday, Aug-25 MATIF opened at €467.75 and traded between highs of €471.25 and lows of €461.00, before settling at €468.75, up €6.00 on Wednesday’s settlement.

- On the CBOT, it was a positive day across the 3 legs of the soy complex. Aug-25 soybeans gained 23.75c to settle at \$10.53/bu, soy oil gained 1.36c to settle at 55.02c/lb, whilst soy meal gained \$3.1 to settle at \$276.8/T. **Price Impact – Positive**
- Nearby (Sep-25) Brent crude fell back slightly by 31c to settle at \$68.80/b as news emerged that Iran and the US are set to meet to restart nuclear talks while Iran’s Foreign Minister stated a commitment to the non-proliferation treaty. **Price Impact – Mixed**
- The pound rebounded back yesterday after Wednesdays pressure, closing yesterday up 0.51% and back above £1=€1.16. **Price Impact - Negative**
- Investment funds positions in Paris Rapeseed futures, while still in a net long position, took a less bullish turn last week, with the number of long, bullish, contracts falling by 6.5k, meanwhile the size of their speculative short, bearish positions increased by 4.1k. **Price Impact – Mixed**
- US ethanol production continued to decline last week, counter to a general trend for a seasonal summer increase in US consumer demand. Production dropped to an average of 1.076 million barrels a day, down from 1.081 million barrels a day the week before and to the lowest since level since the 23rd of May. **Price Impact – Negative**
- US soybean crushing data for May was encouraging, soybeans crushed for crude oil was 6.11Mt in May 2025, compared with 6.07Mt in April 2025 and up significantly from last year at 5.75Mt in May 2024. **Price Impact – Positive**
- In what was another positive for soybeans, weekly US net export sales of 462.4Kt for 2024/2025 were up 15 percent from the previous week and up 62 percent from the prior 4-week average. **Price Impact – Positive**

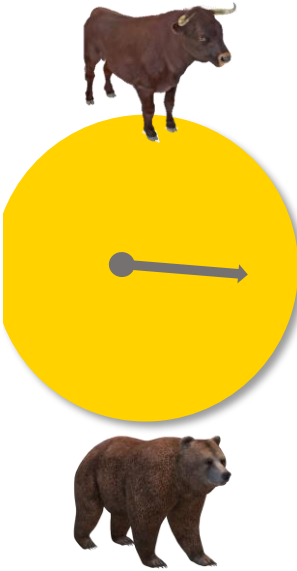
Hubbards Seeds – A United Oilseeds Company

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

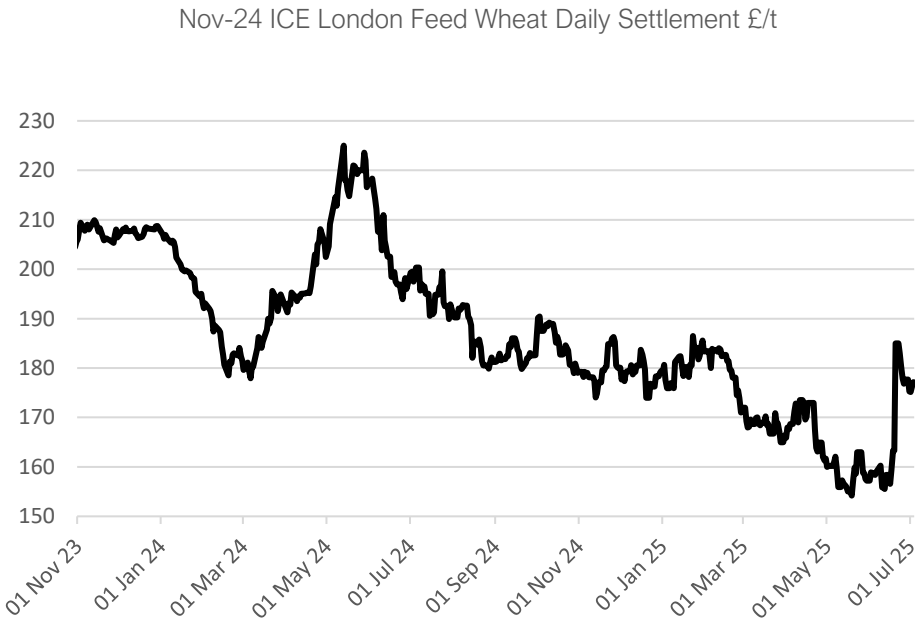
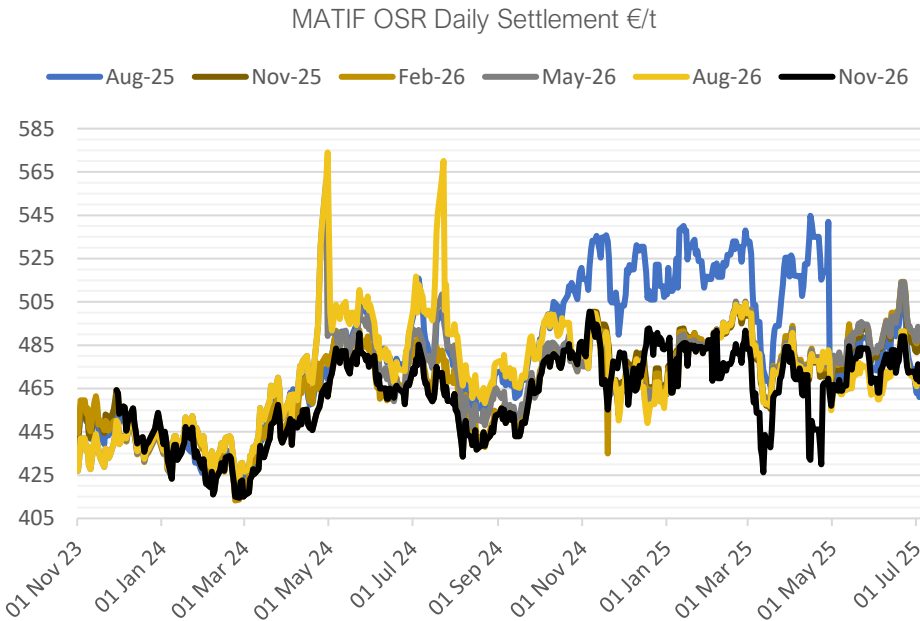
COMPETITIVE PRICING AND PROMPT DELIVERY

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Delivered OSR Prices	Daily Change	Hvst-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
Erith	-£1	£408	£413	£417	£421	£424	£425
Liverpool	-£1	£408	£413	£417	£421	£424	£425
Chettisham	-£1	POA	POA	POA	POA	POA	POA
Stratford	-£1	£408	£413	£417	£421	£424	£425
Berwick	POA	POA	POA	POA	POA	POA	POA
Montrose	-£1	£388	£393	£397	£401	£401	£402
Peterhead	-£1	£388	£393	£397	£401	£401	£402

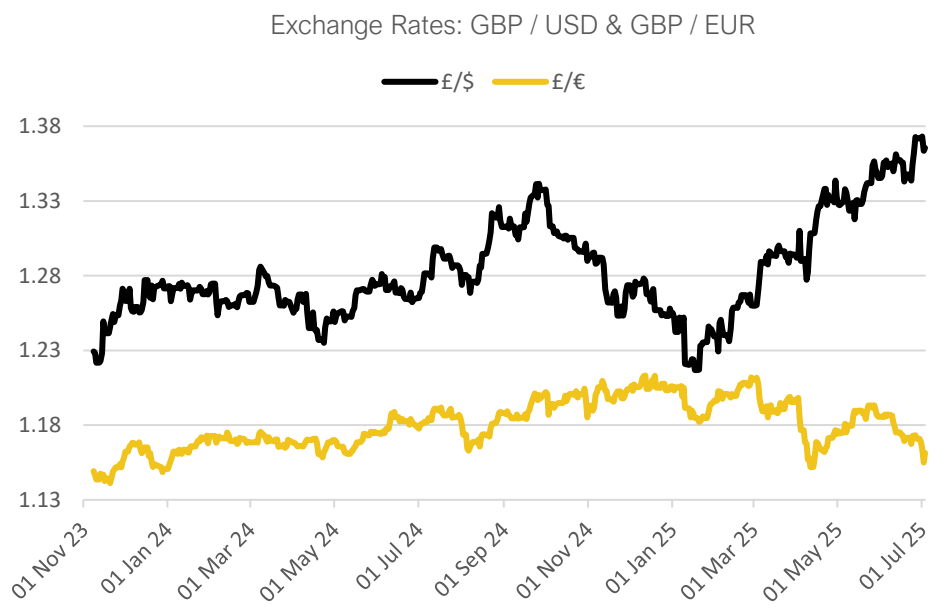
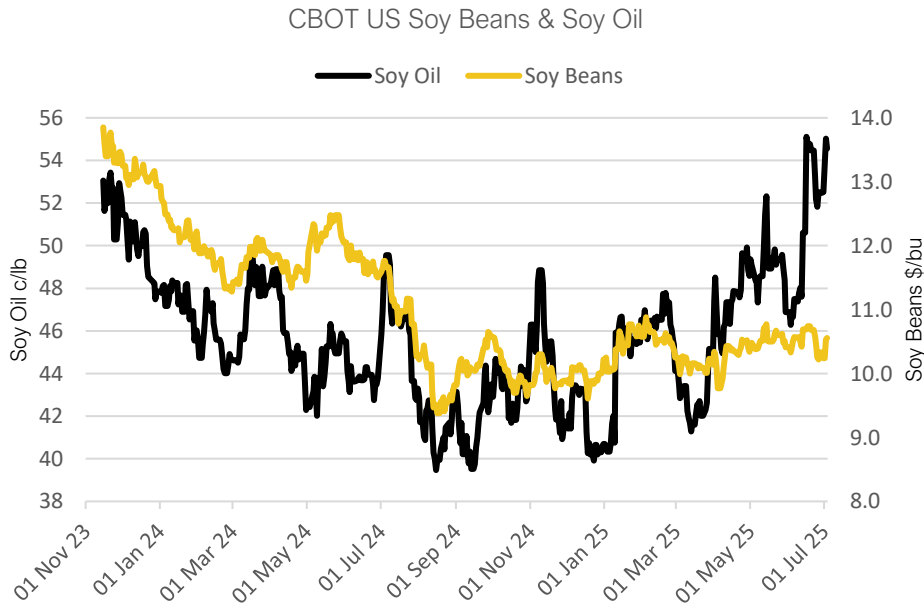


MARKET TRENDS & CURRENCY



CBOT US Soy Complex – Settlement 03.07.2025			
Contract	\$	Month	Daily Change
Soybeans (\$/bu)	\$10.53	Jul-25	+23.75c
Soy Oil (c/lb)	55.02c	Jul-25	+1.36c
Soy Meal (\$/T)	\$276.80	Jul-25	\$3.10

ICE London Feed Wheat – Settlement 03.07.2025		
Delivery Month	£/t	Daily Change
Nov-25	£177.15	£0.70
Jan-26	£181.05	£0.45
May-26	£188.85	-£0.05
Nov-26	£191.25	£0.20



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](#)