

DAILY MARKET REPORT

MARKETS – DAILY COMMENTS & MARKET DRIVERS

On Monday, Aug-25 MATIF opened at €462.75, and traded between highs of €468.75 and lows of €461, before settling at €464, down €1.5 on Friday’s settlement.

- On the CBOT, all 3 legs of the soy complex settled lower. Aug’25 soybeans fell 24c to settle at \$10.31/bu, soy oil fell 0.61c to settle at 53.94c/lb, whilst soymeal fell \$5.2 to settle at \$272.2/t. **Price Impact – Negative**
- The CBOT reopened yesterday after the 3-day Fourth of July weekend.
- On the Bursa Malaysia, Sep-25 crude palm oil gained 9RM to settle at 4,071RM. **Price Impact – Positive**
- On the Dalian, Sep-25 soybeans fell 42CNY to settle at 4,091CNY, soymeal fell 14CNY to settle at 2,948CNY, whilst soy oil fell 72CNY to settle at 7,896CNY. **Price Impact – Negative**
- Nearby (Sep-25) Brent crude gained \$1.28 to settle at \$69.58/b. **Price Impact – Positive**
- Brent gained yesterday on news that a record number of American’s made journeys over the Fourth of July weekend, despite OPEC+ agreeing to hike output by 548k/bpd in August.
- Benchmark European natural gas gained 15c to settle at €33.62/MWh (Aug-25). **Price Impact – Mixed**
- US soybean conditions have come in at 66% good-to-excellent, as per trade estimates and unchanged from last week, although this was down from 68% y/o/y, but above the 5yr average of 62%. **Price Impact – Mixed**
- US winter wheat conditions are 48% good to excellent, below estimates of 50%, unchanged from last week, and down 51% on last year. **Price Impact – Mixed**
- US winter wheat harvest is 53% complete, beating estimates of 49%, up from 37% last week, down from 62% last year, and below the 5yr average of 54%. **Price Impact – Mixed**

Hubbards Seeds – A United Oilseeds Company

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

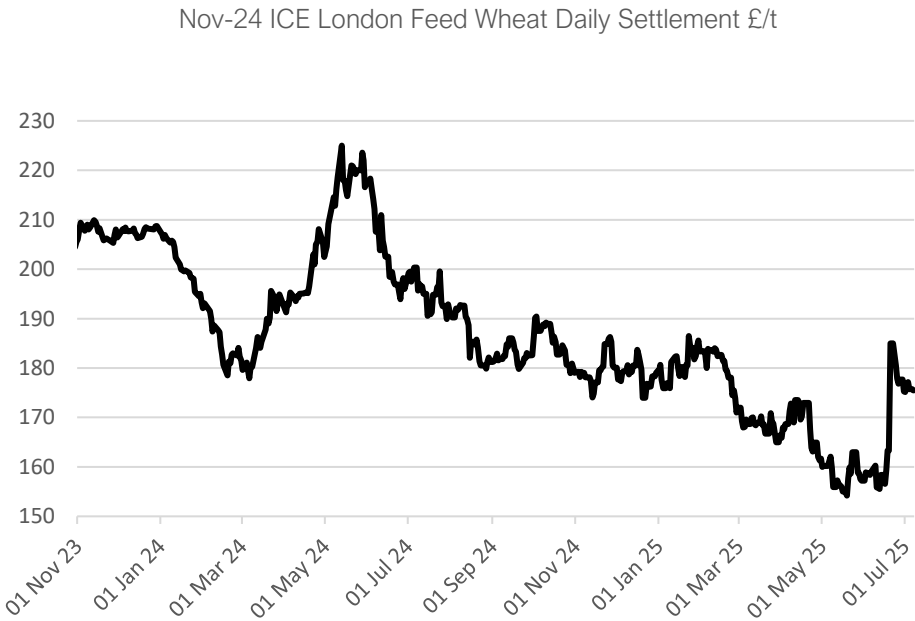
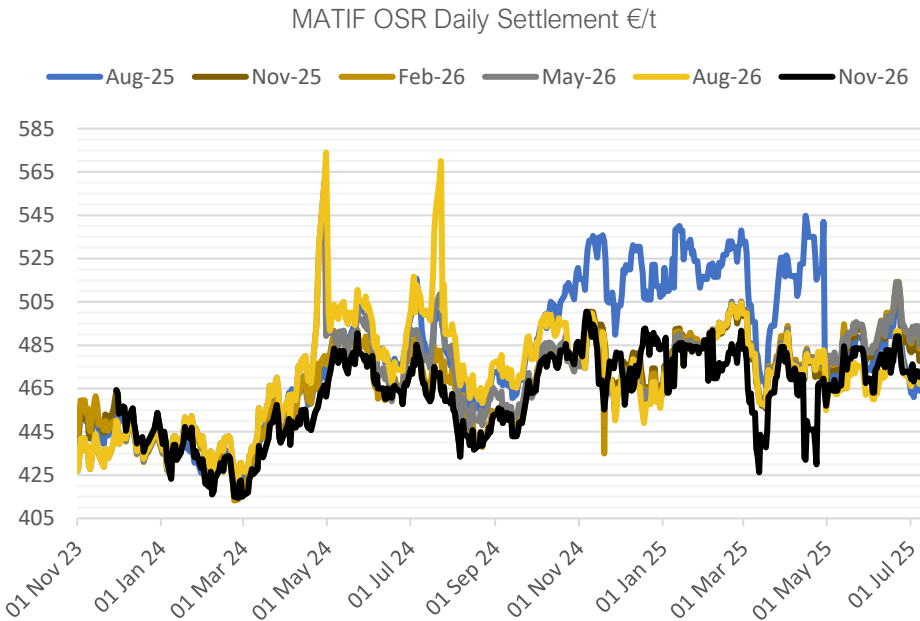
COMPETITIVE PRICING AND PROMPT DELIVERY

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| Delivered OSR Prices | Daily Change | Hvst-25 | Sep-25 | Oct-25 | Nov-25 | Dec-25 | Jan-26 |
|-------------------------|-----------------|---------|--------|--------|--------|--------|--------|
| Erith | £1 | £411 | £416 | £418 | £420 | £422 | £424 |
| Liverpool | £1 | £411 | £416 | £418 | £420 | £422 | £424 |
| Chettisham | £1 | POA | POA | POA | POA | POA | POA |
| Stratford | £1 | £411 | £416 | £418 | £420 | £422 | £424 |
| Berwick | POA | £396 | £401 | £403 | £405 | £407 | £409 |
| Montrose | £1 | £391 | £396 | £398 | £400 | £402 | £404 |
| Peterhead | £1 | £391 | £396 | £398 | £400 | £402 | £404 |

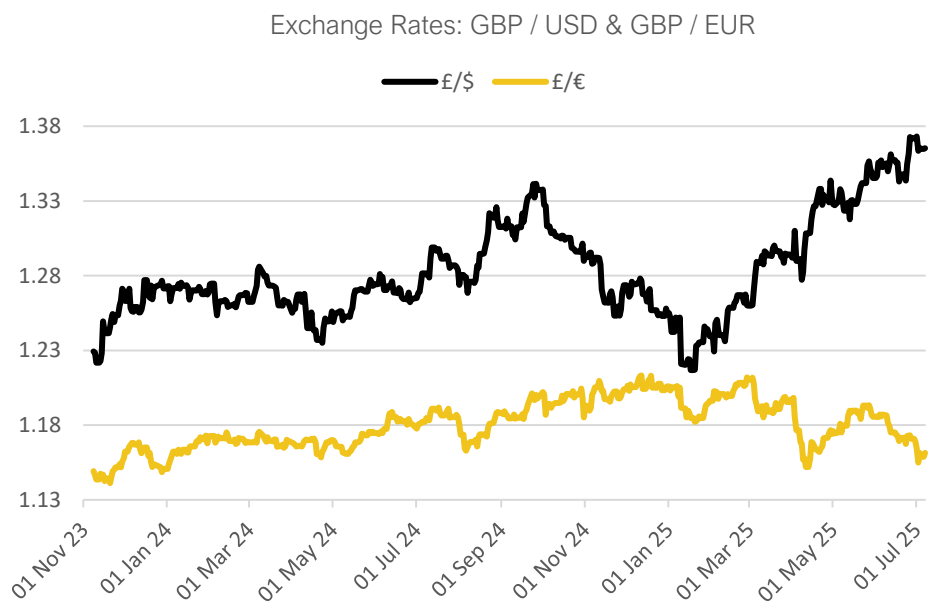
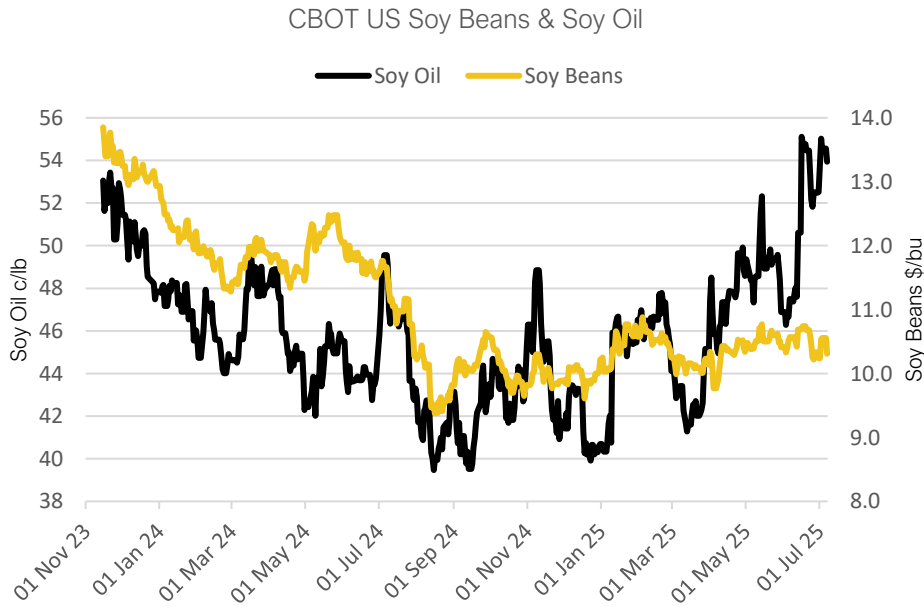


MARKET TRENDS & CURRENCY



| CBOT US Soy Complex – Settlement 07.07.2025 | | | |
|---|---------|--------|--------------|
| Contract | \$ | Month | Daily Change |
| Soybeans (\$/bu) | \$10.31 | Aug-25 | -24.00c |
| Soy Oil (c/lb) | 53.94c | Aug-25 | -0.61c |
| Soy Meal (\$/T) | \$272.2 | Aug-25 | -\$5.20 |

| ICE London Feed Wheat – Settlement 07.07.2025 | | |
|---|----------|--------------|
| Delivery Month | £/t | Daily Change |
| Nov-25 | £175.45 | -£0.25 |
| Jan-26 | £179.45 | -£0.45 |
| May-26 | £183.45- | £0.65 |
| Nov-26 | £189.95 | -£1.05 |



THE UNITED OILSEEDS OSR REBOOT

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

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