



DAILY MARKET REPORT

MARKETS – DAILY COMMENTS & MARKET DRIVERS

On Thursday, Aug-25 MATIF opened at €483.25, and traded between highs of €486.00 and lows of €476.25, before settling at €482.25, down €1.00 on Wednesday’s close.

- On the CBOT it was a day of pressure yesterday, Jul’25 soybeans fell by 8.25c to settle at \$10.42/bu, soy oil fell by 0.41c to settle at 47.61c/lb, whilst soymeal gained just \$0.30 to \$294.50/T. **Price Impact – Negative**
- Nearby (Aug’25) Brent crude has been pushing higher this morning while US stocks have been falling with news that Israel conducted a round of military strikes against Iran’s nuclear program and military leadership, marking a significant escalation of tensions in the Middle East region. **Price Impact - Positive**
- In yesterday’s USDA WASDE, the USDA increased their production outlook for EU OSR production for 2025/26, increasing their forecast by 200kt to 19.35Mt, the estimate for the UK at 720Kt being down by 104Kt from last year and 0.5Mt down from 2023. **Price Impact – Mixed**
- The June USDA WASDE also increased EU wheat production outlooks, up by 550Kt to 136.55Mt to the largest crop since 2021. **Price Impact – Negative**
- The pound has come under pressure this week relative to the Euro as according to the ONS, the UK economy contracted by 0.3% month-on-month in April, down from 0.2% in March. The fall in the value of the pound helping push domestic OSR values higher, falling from £1=€1.1885 on Monday to a low yesterday of £1=€1.17. **Price Impact – Positive**
- Despite the pressure on the pound relative to the Euro, compared to the US dollar and the pound finished yesterday at £1=\$1.3613 and the highest close since early 2022, keeping meal values under pressure.. **Price Impact – Negative**
- Due to the US Federal holiday, Managed Money fund position data is delayed by a day, and US export sales delayed until the 20th.

Hubbards Seeds – A United Oilseeds Company

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

COMPETITIVE PRICING AND PROMPT DELIVERY

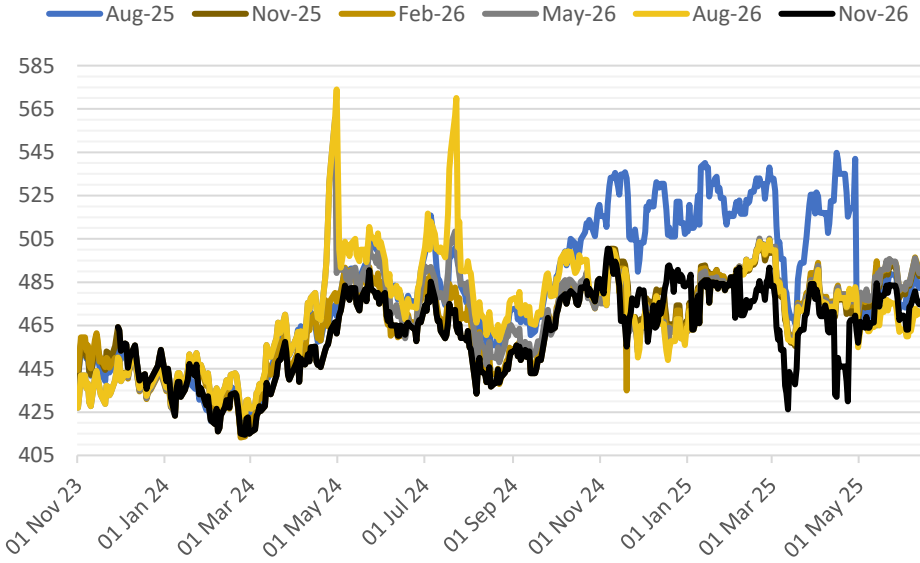
Request a quote by email to hello@hubbardsseeds.co.uk

Delivered OSR Prices	Daily Change	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25
Erith	£10	£424	£412	£418	£419	£421
Liverpool	£10	£424	£412	£418	£419	£421
Chettisham	£10	POA	POA	POA	POA	POA
Stratford	£10	£424	£412	£418	£419	£421
Berwick	POA	POA	POA	POA	POA	POA
Dundee	£10	£399	£403	£405	£406	£406
Montrose	£10	£399	£403	£405	£406	£406
Peterhead	£10	POA	£403	£405	£406	£406
Inverness	£10	£399	£403	£405	£406	£406



MARKET TRENDS & CURRENCY

MATIF OSR Daily Settlement €/t



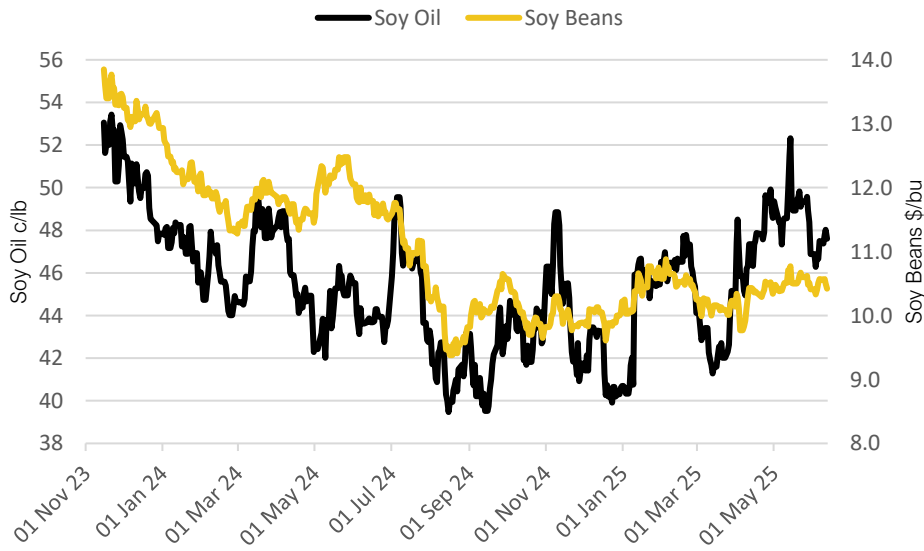
Nov-24 ICE London Feed Wheat Daily Settlement £/t



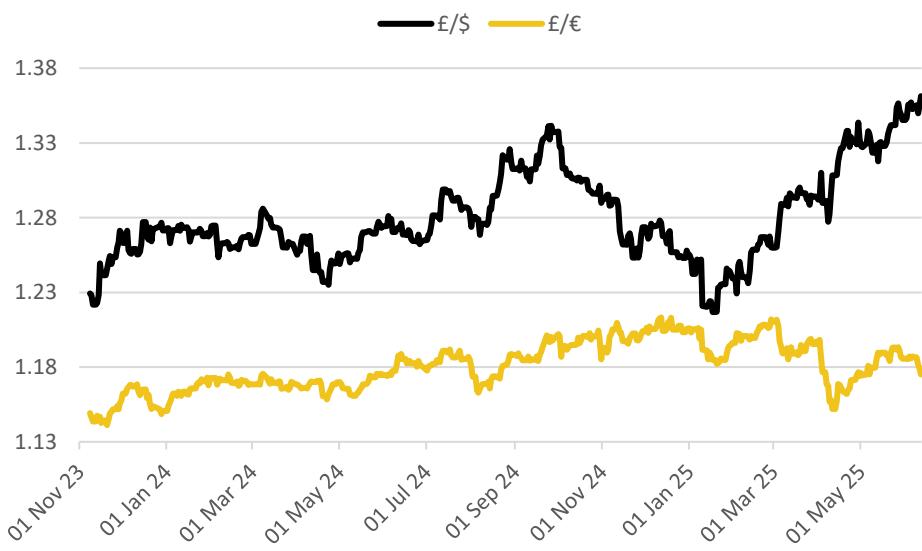
CBOT US Soy Complex – Settlement 12.06.2025			
Contract	\$	Month	Daily Change
Soybeans (\$/bu)	\$10.42	Jul-25	-8.25c
Soy Oil (c/lb)	47.61c	Jul-25	-0.41c
Soy Meal (\$/T)	\$294.50	Jul-25	\$0.30

ICE London Feed Wheat – Settlement 12.06.2025		
Delivery Month	£/t	Daily Change
Nov-25	£177.00	-£0.30
Jan-26	£180.50	-£0.35
May-26	£187.50	-£0.45
Nov-26	£189.25	-£0.75

CBOT US Soy Beans & Soy Oil



Exchange Rates: GBP / USD & GBP / EUR



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](#)