

DAILY MARKET REPORT

MARKETS – DAILY COMMENTS & MARKET DRIVERS

On Thursday, Aug-25 MATIF opened at €493.75 and traded between highs of €500.50 and lows of €492.75, before settling at €500.25, up €6.25 on Wednesday’s settlement.

- On the CBOT, trading was closed for the US Juneteenth holiday.
- Nearby (Aug-25) Brent crude was also closed yesterday, but so far this morning and crude oil is trading higher and above \$77/b. **Price Impact – Positive**
- The pound recorded a marginal gain against the Euro yesterday to close at £1=€1.1713, having previously fallen to the lowest level relative to the Euro on Wednesday since late April.
- Again weighing on the pound today is the latest ONS report, detailing a slump in retail sales. Retail sales volumes (quantity bought) are estimated to have fallen by 2.7% in May 2025. [Read the full report here](#) **Price Impact - Mixed**
- US Ethanol production fell back slightly last week to an average of 1.109 million barrels a day in the week that ended on June 13, inventories also increased to 24.12 million barrels from 23.734 million the previous week. **Price Impact – Negative**
- In the US Midwest, Showers and thunderstorms chipped away at existing dryness (D0) and moderate to severe drought (D1 to D2), although not all areas received significant rain. Some of the most substantial drought relief occurred in the upper Great Lakes region and parts of the western Corn Belt. On June 15, Iowa with topsoil moisture was rated at 27% very short to short, according to the U.S. Department of Agriculture. **Price Impact – Positive**
- With the rise in crude oil and tensions in the middle east, Investment Fund positions in Paris Rapeseed futures turned more bullish once again, now holding 48.4k long contracts and the most held since March. **Price Impact – Positive**

Hubbards Seeds – A United Oilseeds Company

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

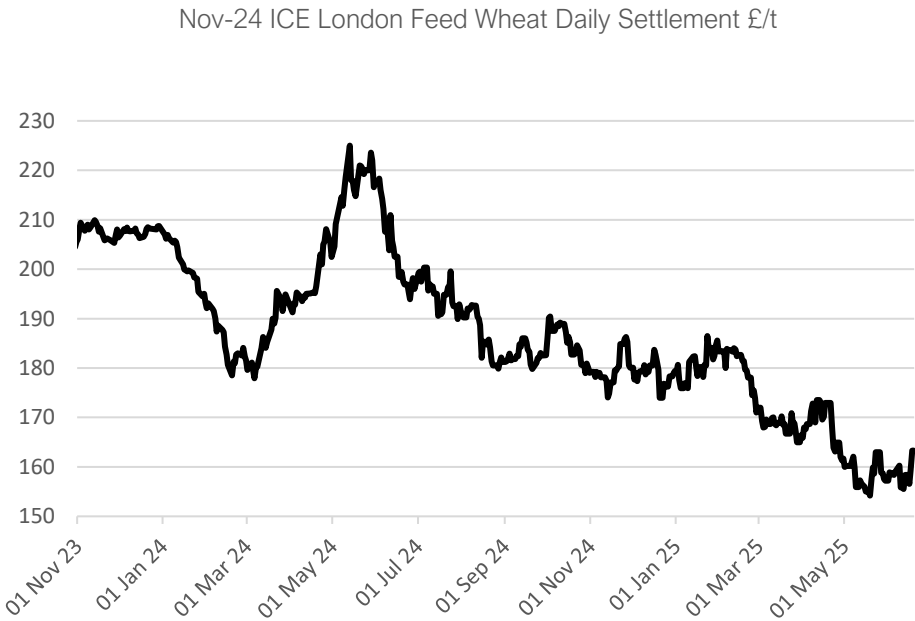
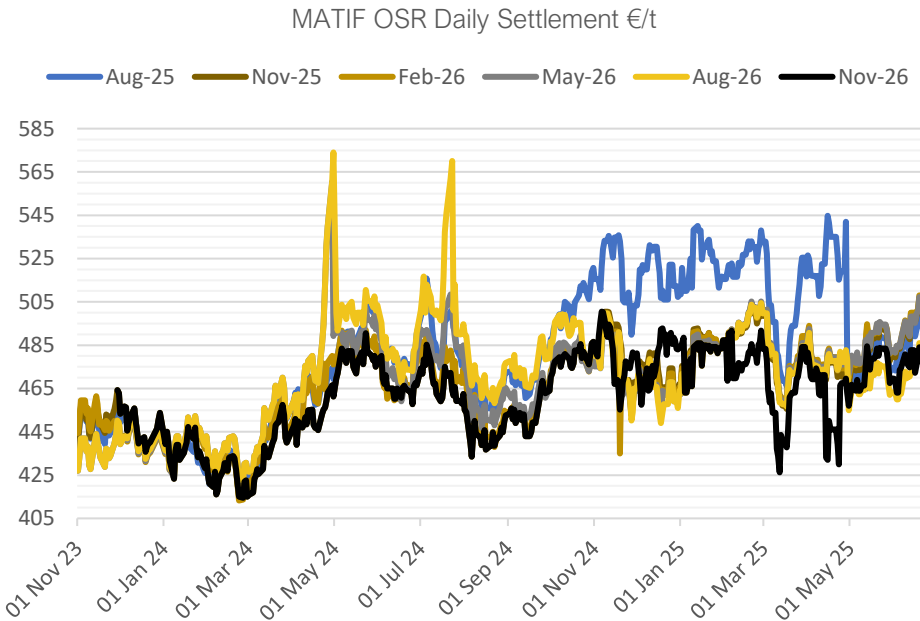
COMPETITIVE PRICING AND PROMPT DELIVERY

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Delivered OSR Prices	Daily Change	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25
Erith	£5	£437	£441	£443	£444	£445
Liverpool	£5	£437	£441	£443	£444	£445
Chettisham	£5	POA	POA	POA	POA	POA
Stratford	£5	£437	£441	£443	£444	£445
Berwick	POA	POA	POA	POA	POA	POA
Dundee	£5	£417	£421	£423	£424	£425
Montrose	£5	£417	£421	£423	£424	£425
Peterhead	£5	£417	£421	£423	£424	£425
Inverness	£5	£417	£421	£423	£424	£425

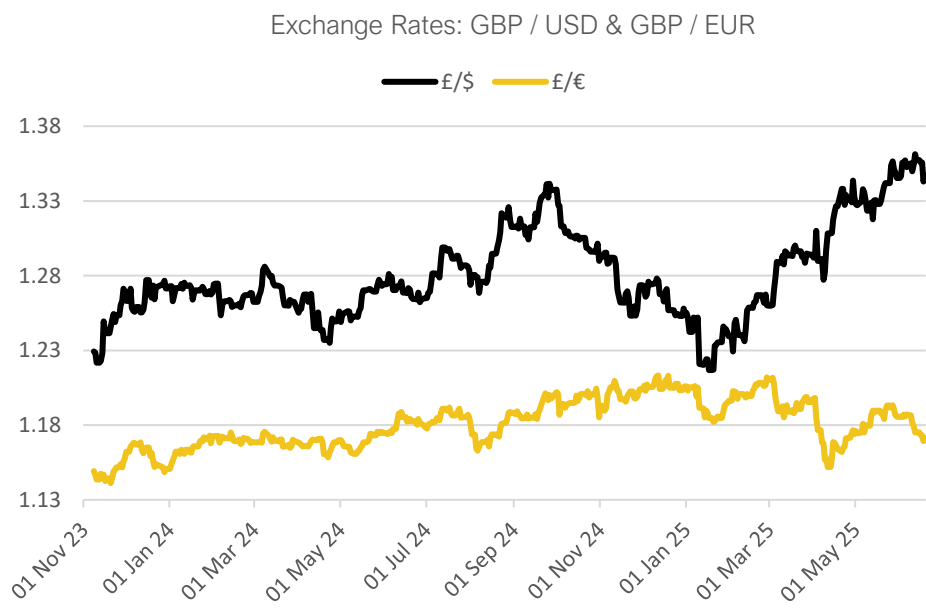
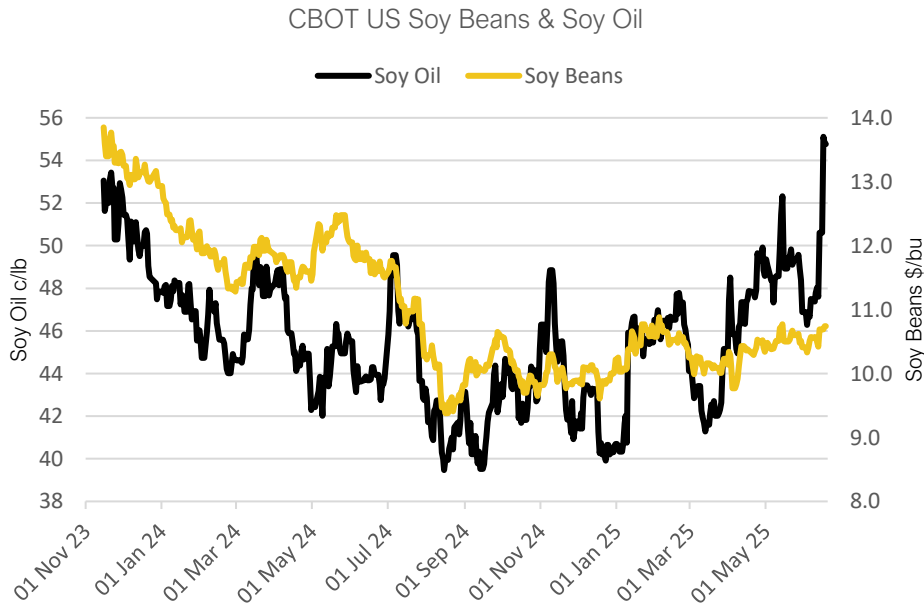


MARKET TRENDS & CURRENCY



CBOT US Soy Complex – Settlement 19.06.2025			
Contract	\$	Month	Daily Change
Soybeans (\$/bu)	\$10.74	Jul-25	NA
Soy Oil (c/lb)	54.77c	Jul-25	NA
Soy Meal (\$/T)	\$284.90	Jul-25	NA

ICE London Feed Wheat – Settlement 19.06.2025		
Delivery Month	£/t	Daily Change
Nov-25	£184.75	+£0.00
Jan-26	£188.20	+£0.05
May-26	£195.10	+£0.10
Nov-26	£197.20	-£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](#)