

ANALYSIS

The long tail of a hot summer: milk, fodder and beef after summer 2026

Summary

- UK dairy farms delivered **over 240 million litres** less milk than would normally be expected between May and August, as the UK sweltered through its hottest summer on record. This is equivalent to over **95 Olympic swimming pools**.
- At the average summer farmgate price, this shortfall would have been worth over **£83m** to farmers.
- Deliveries fell below expected in May and then remained below expected for the rest of the summer. **The shortfall gap widened each month: -2.5% below in May, -4.1% in June, -5% in July and -6.2% in August.**
- The summer heat also impacted summer grass growth, with growth to date as of September 4 at approximately **86% of the long-term average**, the second short season in a row. **Nationally, this shortfall is enough to feed the UK cattle herd for 2 months.**
- Last year's drought sent **hay prices up by more than 80% over winter**. With hay currently trading at similar levels to 2025, and farmers forced to dip into winter forage stores, **the conditions for another price spike are in place.**
- A second tight forage winter risks **exacerbating pressures on UK livestock farmers**, with herd culls on the rise in the UK's most drought-stricken region. This could cause more beef supply now, and less into next year.

The summer shortfall: dairy

The analysis compared UK daily milk deliveries for 1 May – 31 August 2026 against what would have been expected given the normal seasonal pattern of production.

Milk output follows a predictable annual curve, peaking in the spring flush around May and then easing through the summer. To calculate what a 'normal' summer would have looked like, each year from 2008–2025 was indexed to its own May delivery average, and the daily indices were averaged to produce a typical seasonal decline profile. This profile was then applied to a May 2026 baseline to give an expected daily volume for each of the 92 days of summer 2026. The difference between actual and expected deliveries is the shortfall.

Anchoring that baseline to observed May 2026 output, however, understates the shortfall. The March-to-May uplift — the spring flush itself — was [the weakest in the record](#) in 2026, at 3.2% against a long-run average of 6.8%, because the late-May heatwave suppressed the peak before summer had even begun. A depressed May baseline lowers expected summer volumes and therefore the estimated shortfall.

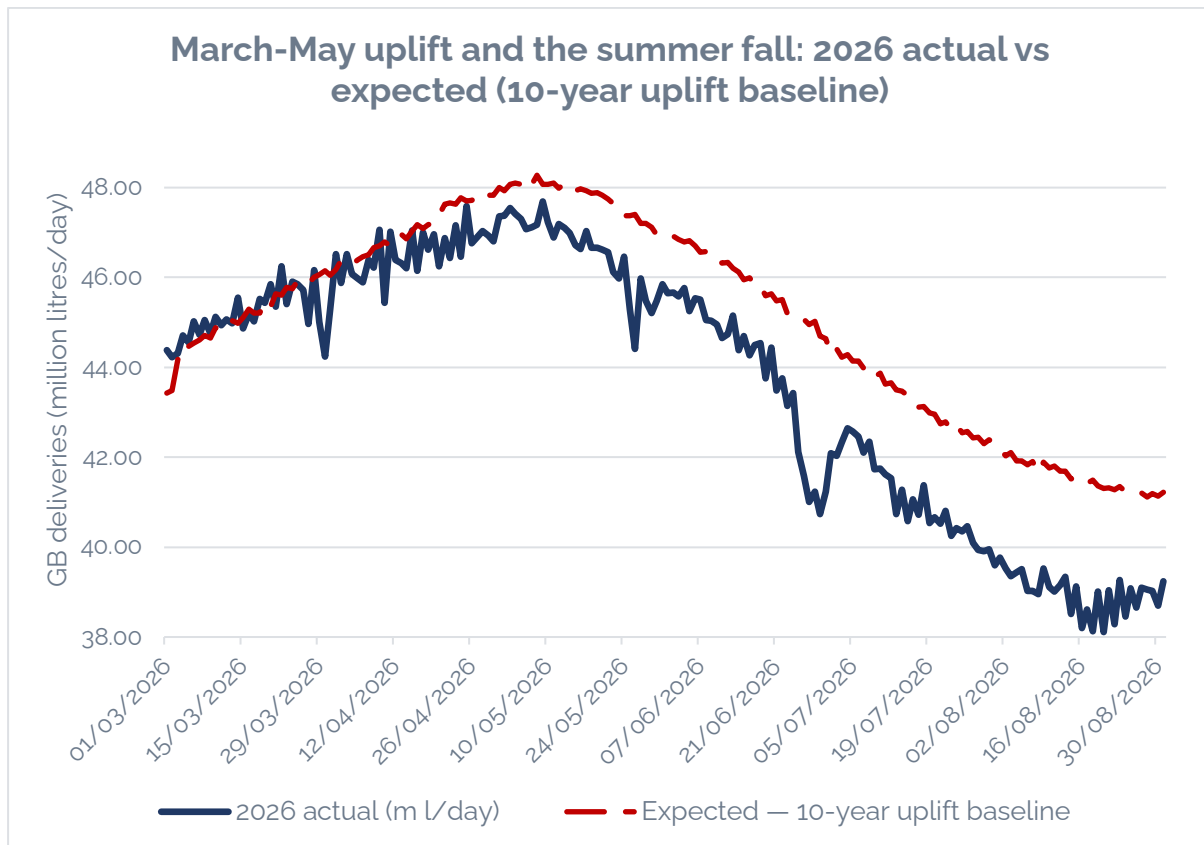
To correct for this, the May baseline was rebuilt from the March 2026 average of 45.1m litres per day, uplifted by the average March-to-May increase over the last ten years (2016–2025) of 5.8%. That gives a counterfactual May 2026 of 47.8m litres per day, against the 46.6m recorded.

On this basis, summer 2026 deliveries fell 240.5m litres short of expectation — a gap of 4.4%, or around 423m pints, worth some £83.5m to farmers at the 2026 average farmgate price. The shortfall compounds through the season rather than being a one-off heat event, widening from 2.5% in May, 4.1% in June, 5.0% in July and 6.2% in August. Using the depressed, observed May 2026 figure as the anchor would have put the loss at 105.7m litres, or £36.7m.

UK milk deliveries versus seasonal expectation, summer 2026

Month	Actual (m litres)	Expected (m litres)	Shortfall (m litres)	Shortfall (%)
May	1,444.6	1,481	-36.4	-2.5
June	1,320.9	1,377.7	-56.8	-4.1
July	1,274.5	1,342.2	-67.7	-5.0
August	1,208.3	1,288	-79.7	-6.2
Total	5,248.3	5,488.8	-240.5	-4.4

Source: ECIU analysis of AHDB delivery data



[Previous ECIU analysis](#) showed that the peak of the May and June heatwaves coincided with the largest single-day falls in milk deliveries for those dates in 18 years of data. Examining the full summer's worth of delivery data shows that milk production did not return to normal after the June heatwave. On 87 of the 92 days this summer, deliveries fell further below their expected level than on any equivalent date between 2008 and 2025 — including every single day of July and August. The pattern deepened as the summer progressed: 25 such days in June, then all 31 in both July and August.

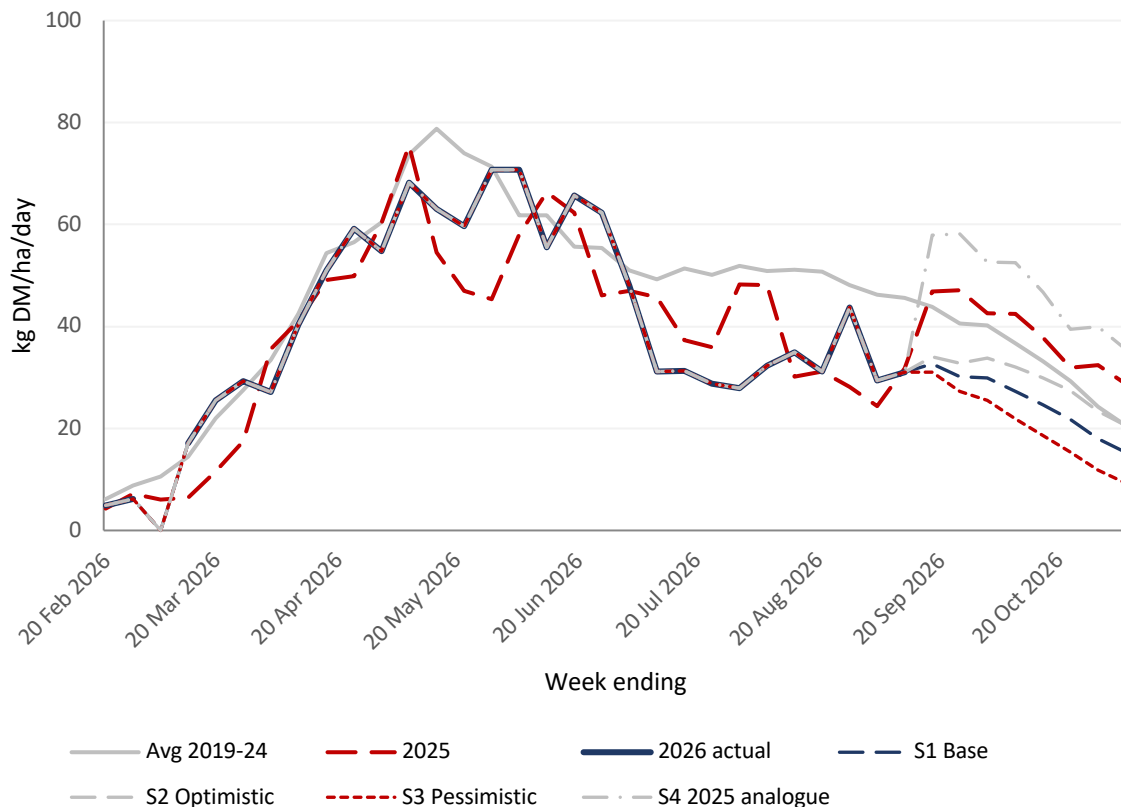
This shortfall has led to processors [announcing further price increases](#) in September and October, as they look to shore up supply.

The summer shortfall: grass

The same heat and drought that affected milk yields also impacted the grass that dairy, beef and sheep farms rely on for summer grazing and winter forage.

Analysis of AHDB Forage for Knowledge data shows UK grass growth for the season to 4 September at 8,190kg of dry matter (DM) per hectare – 86% of the 2019-2024 average, or around 1,330kg DM/ha behind. This is marginally ahead of the same point in 2025, itself a drought year, but means that 2026 will almost certainly be a second consecutive short season.

GB grass growth, 2026 scenarios vs 2025 and the 2019-24 average



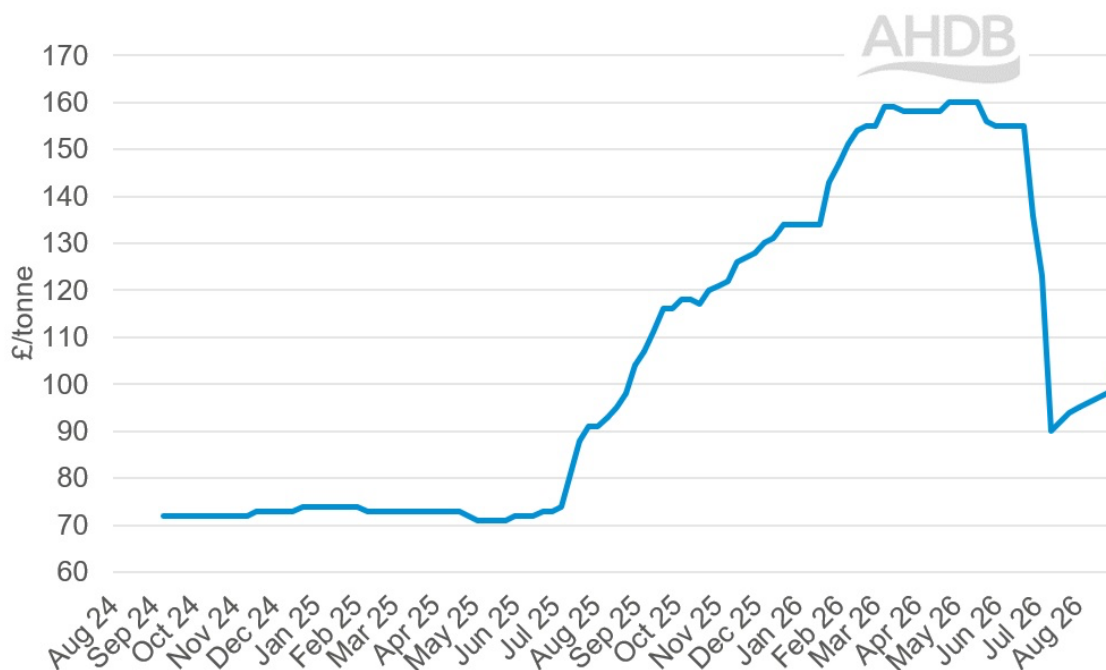
By early September, around 81% of the normal season's grass growth has happened. Therefore, even if growth returned immediately to average for the rest of the season, 2026 would still finish at around 85% of normal.

Scaled to the extent of improved grassland in the UK (roughly 7.4m ha), the national loss is equal to 9.84mt DM, or enough to feed the UK's cattle herd for roughly two months.

This shortfall has already caused many livestock farmers to dip into their winter stores, meaning that less will be available to feed their animals over winter and so must buy in more hay. [A recent survey](#) of UK organic dairy farmers reported that 81% of farmers surveyed said the impact of the low forage availability was severe, with only 5% reporting they were comfortable, or near comfortable.

Potential impacts: hay prices

The 2025 season, analogous to 2026, cut hay yields significantly, particularly in the south and east of the UK. By the end of September 2025, big bale hay prices were 46% higher than the same time in 2024, and by December they were up 83% year on year. The impact of rising prices had a spillover effect on straw, as farmers turned to it as a bulking feed, with wheat straw reaching £92/t and barley straw £102/t by mid-February 2026.



.Source: British Hay & Straw Merchants Association via [AHDB](#)

Big bale hay was trading at £105/t in the week to September, £2 below the same week last year, but £7 up on the previous week. With farmers' winter stores already depleted, and coming off the back of the 2025 season, the conditions are in place for a similar price spike to occur. A 2025-style rebound in grass growth through September and October may mitigate this risk, whereas a dry autumn and/or a wet spring, delaying turnout, would add to it.

Potential impacts: beef

Feed shortages feed through to beef production on two different timescales.

In the short term, more cows go to slaughter, as farmers seek to cut feed demand by selling or culling stock. [Research](#) after the 2018 drought found that a year later, two-thirds of surveyed livestock farmers were still short of forage, and half of those had sold off stock (Salmoral et al., 2020). There are signs that this is happening already with [AHDB reporting](#) in recent weeks that cull cow throughput has picked up, particularly in central and southern regions. More throughput on the market in the short term may put downward pressure on prices.

This is already visible in the price data. In the eight weeks to 12 September, the GB average deadweight cow price fell from 493p/kg to 446p/kg, a drop of 9.6%, while cull cow throughput rose by around 16% — with the increase concentrated in the southern and central regions worst affected by the summer's drought, and absent in Scotland, where throughput fell. Prime cattle prices moved in the opposite direction over the same eight weeks, with steers up 2.3% to 617p/kg, and up 4.1% from their early-June low. The result is an unusually wide gap between the two: the cow price is now 72% of the steer price, against 82% in mid-July and 80% at the same point last year. The divergence points to a supply shock specific to the breeding herd rather than general weakness in beef demand, consistent with farmers reducing cow numbers ahead of a second tight forage winter.

In the medium term an increase in culling may have knock-on impacts on calving numbers and finished animal availability in the years following. With the UK herd for both dairy and cattle shrinking, a second short forage year may reduce supply of cattle in the medium-term, potentially increasing prices.

With UK beef prices influenced by international markets and consumer preferences, the net impact of this impact on prices is difficult to determine. However, the direction of travel is towards a smaller herd and tighter supply of UK beef over the next two to three years.

Methodology

Milk deliveries. [Daily UK milk deliveries](#) (million litres/day) from AHDB.

Seasonal index. Each day from 2008 to 2025 was expressed as a percentage of its own year's May average, to isolate the shape of the seasonal decline from the level of production in any given year (e.g. on 1 June 2025 deliveries were 98.6% of the May 2025 average, on 2 June 97.8%, and so on). These percentages were then averaged across the eighteen years for each calendar date, giving an average expected decline profile.

May 2026 baseline. Applying the index to observed May 2026 deliveries would understate the shortfall, because the May peak was itself suppressed by the late-May heatwave: the March-to-May uplift, the spring flush, was the weakest in the record at 3.2% against a long-run average of 6.8%. The baseline was therefore reconstructed from March 2026, which was unaffected. The March 2026 average of 45.1m litres/day was uplifted by 5.8% — the average March-to-May increase over the last ten years, 2016–2025 — giving a counterfactual May 2026 baseline of 47.8m litres/day, against the 46.6m recorded.

Expected and actual. Expected deliveries for each calendar day = 47.8m litres × the seasonal index for that day. Shortfall = expected minus actual, summed across 1 May to 31 August 2026. This gives a shortfall of 240.5m litres, or 4.4% below expectation.

Value. Shortfall × UK average farmgate "all milk" price (excluding bonuses) of 34.7p/litre (June–July 2026 average; Defra). One litre = 1.76 pints.

Grass growth. [AHDB Forage for Knowledge](#) weekly GB grass growth (kg DM/ha/day), 2019–24 average, 2025 and 2026 actuals to the week ending 4 September. Weekly values × 7 summed from 20 February to 6 November on a common 37-week frame. The 2019–24 average excludes the 2025 drought. Scenarios are illustrative. Cow-feed equivalents assume intake of 15–18kg DM/cow/day.

Feed shortfall. The measured 1,330kg DM/ha deficit was applied to the [UK's improved grassland area](#) of 7.4m hectares, giving a national loss of approximately 9.84m tonnes DM. Divided across the [UK cattle herd of 9.3m](#) animals, that is around 1,060kg DM per head, or 59–71 days' feed at an assumed intake of 15–18kg DM/animal/day. The figure is indicative: it assumes the monitored swards are representative of improved grassland nationally, and takes no account of sheep and other grazing livestock that share the same ground.

Beef prices. [AHDB weekly GB deadweight cattle prices](#), p/kg. Cull cow and prime steer series compared for the weeks ending 18 July 2026 and 12 September 2026, the latest available at the time of writing. Regional breakdown uses AHDB's Southern, Central, Northern and Scotland reporting regions.

Hay and straw prices. [AHDB/British Hay and Straw Merchants' Association weekly GB big bale prices](#), £/t ex-farm. Merchant buying prices; farm-to-farm trade (mainly round bales) is not captured.

Attribution. [The Met Office](#) estimates that climate change made a summer as hot as 2026 around 130 times more likely. This analysis does not attribute the milk or grass shortfalls to climate change directly; the rainfall deficit behind the grass shortfall is less clearly attributable than the heat.