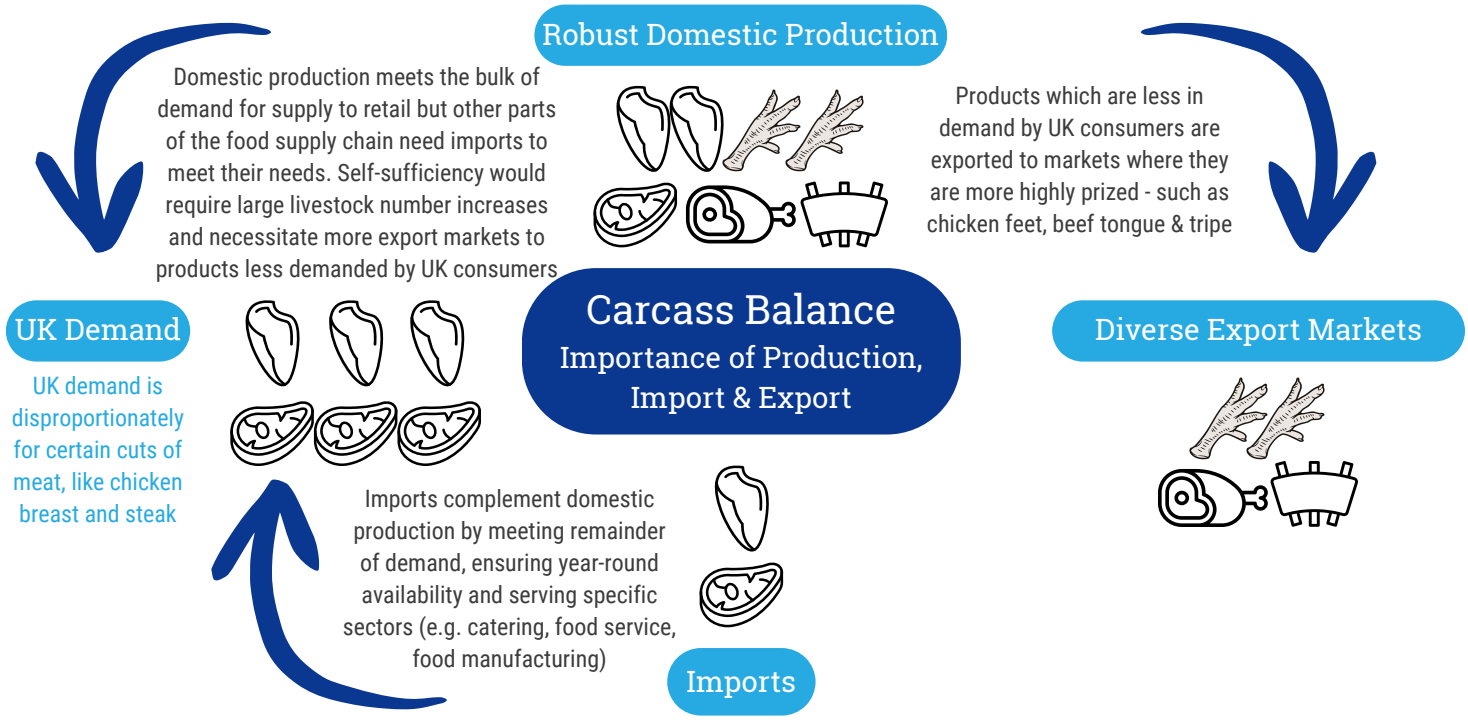
The Role of Imports in Supporting UK Food Security

An IMTA Publication

We need more nuance in the discussion around imports. IMTA strongly supports a strong UK domestic sector. However, we also need imports to complement this supply in specific areas and when market dynamics change. We also need export markets to ensure we maximise financial returns to UK producers (and reduce food waste through sustainable carcass utilisation) by diverting cuts that are less demanded at home to other markets where these products are more highly valued.

As a densely-populated island nation where land is at a premium, two-way trade supporting a strong domestic sector is the most sustainable and efficient way to meet UK demand. This is called 'carcass balance' – see a very simplified illustration below:



What other benefits do imports bring?

- **Smoothing out volatility** – Imports play a crucial balancing role during periods of volatility – allowing UK businesses to pivot suppliers to navigate outbreaks of animal disease or other supply shortages. This keeps consumers better insulated from shortages and sharp price increases. This has been particularly helpful for poultrymeat, where avian influenza impacts on supply in the domestic market as well as overseas.
- **Seasonality** – Imports allow us to enjoy products year-round, complementing domestic production during leaner seasons. For example, the UK's lamb production peaks in Autumn, while New Zealand's peaks in Spring, just in time for Easter.
- **Consumer Choice** – Imports offer UK consumers opportunities to sample meat from around the world – from Italian mortadella to Spanish Jamón Ibérico and Japanese Kobe beef. The same is true in reverse – having diverse export markets gives consumers in other countries the chance to access the UK's finest meat offerings like Welsh lamb or Scotch beef and traditional products such as Cumberland sausages, pork pies & black pudding.

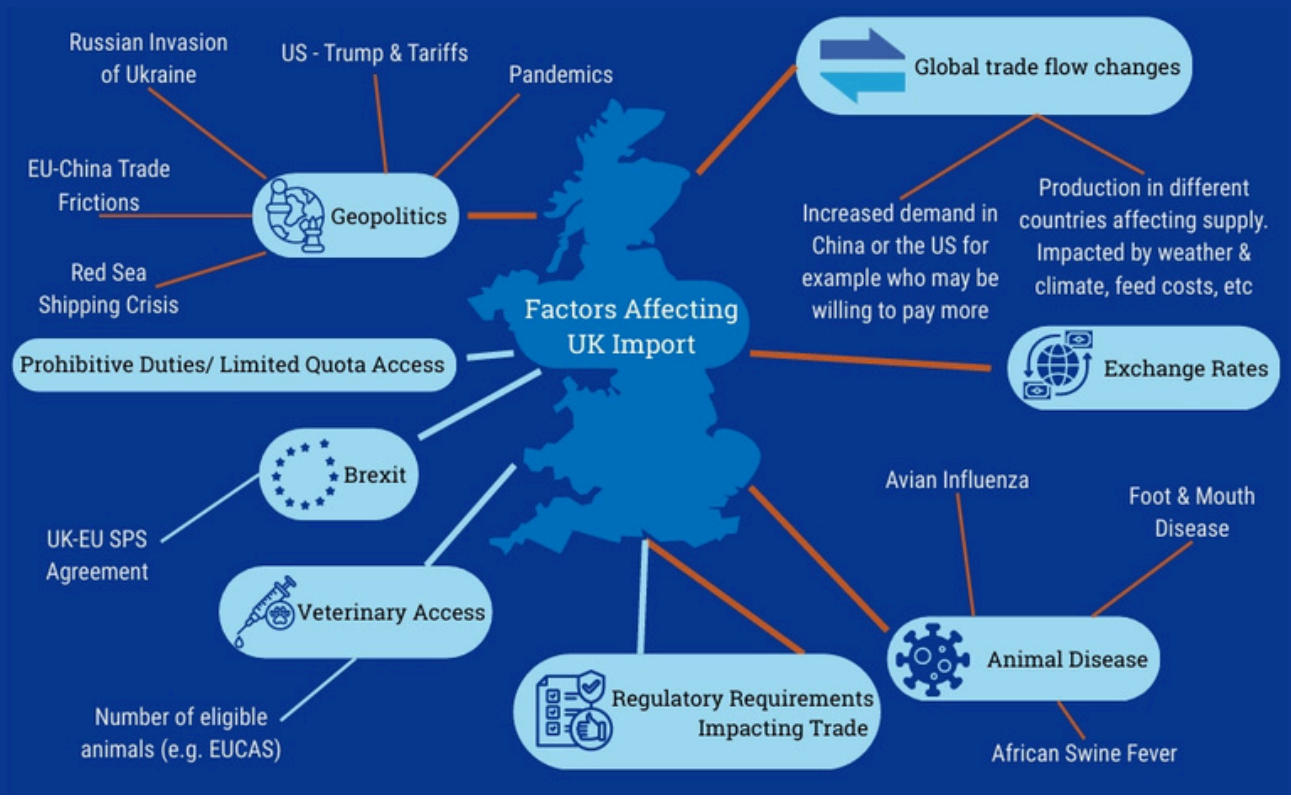
We often hear that the UK should try and become self-sufficient rather than relying on 'cheap' or 'substandard' imports. We would like to provide some balance to this overly simplistic narrative which is commonly used.

Myth-busting

"imports are cheap"	Imports are not homogenous, and serve a variety of specific sectors where domestic production is unable to, e.g. food service, manufacturing, wholesale and catering such as schools & prisons. Imports complement – rather than compete with – domestic production, and are not imported solely for their price. Retail buyers have the power to purchase domestic production whereas other parts of the food supply chain have less purchasing power and so imports play a key role in supply to the likes of food service, manufacturing, wholesale, and catering (e.g. schools, prisons). Some countries also specialise in certain meat products, and can provide these to UK consumers when domestic production cannot – for example, Brazil supplies 80% of the world's canned corned beef and is an important supplier of this to the UK, while Thailand is a sophisticated supplier of cooked chicken breast. Imports allow UK consumers to enjoy a diverse range of meat from across the world, from Japanese A5 Kobe beef to Australia's 2024 World Steak Challenge winner.
"imports are lower standard"	Around the world there are many proud meat supplying nations who take pride in producing their livestock. In any region of the world, production is rarely homogenous, and welfare and environmental standards differ both within and between countries. Imports must meet UK and EU rules for food safety, biosecurity, traceability etc and this is certified by vets in the exporting country as well as audited by UK and EU authorities to ensure this is the case. Major exporting countries recognise the importance of high standards and it is commonplace for UK customers of imported product to require in country audits to ensure that products meet their specifications including considering welfare and sustainability credentials. Often these audits go above and beyond the legal requirements of that region, ensuring that products meet the expectations of UK consumers. Every country also has unique geographic contexts which can mean high standards in one country might not easily translate into another context – for example, keeping livestock permanently outdoors would be worse practice in countries which have very hot summers or very cold winters.
"we can/should be self-sufficient"	See IMTA's self-sufficiency myth for explanation of carcass balance and why self-sufficiency is not desirable in meat. Food security also depends on having a flexible, diverse range of food supply sources to mitigate risk. Being overly reliant on any one source (even if that source is domestic production) magnifies the threat to UK food supply in the event of an animal disease outbreak for example.
"supermarkets shouldn't be stocking imported products"	When there isn't enough product available, it is important to keep UK consumers supplied with access to high quality protein. Domestic production is vital but there must be recognition that imports play a balancing role to ensure consumer choice and supply year-round whilst domestic production rebounds. This is not a threat to UK farmers, more a necessity thinking about UK consumers; particularly with meat price inflation at its current levels. Flexibility to adapt to changing market conditions smooths out supply fluctuations and is important to maintain food security & ensure consumer choice.

What factors affect imports?

There are many factors which can affect trade flows. Some key factors that are in the UK's control include veterinary access and quotas. Just because a quota is in place does not mean it will necessarily be utilised! See more in the table below, and in the case studies on pg. 4.



UK Meat Consumption

Although per capita consumption of beef, pork and sheepmeat has slowly decreased over time, OECD-FAO projects that **total UK consumption of meat is likely to increase between 2023-2033 for beef & veal (+3.3%), poultrymeat (+10.1%) and sheepmeat (+1.5%)**.

At the same time there are **pressures on UK and EU domestic production** and we are seeing significant meat price increases in 2025 partly as a result of tight supplies – particularly for beef and poultrymeat. AHDB forecast a decline in UK beef production of 6.3% to 2030 (vs 2023). UK poultry production expansion is limited by British Chicken Commitment (BCC) stocking density requirements and planning rejections.

In 2024, meat imports constituted 39% of UK overall meat consumption. Roughly 80% of the UK's total meat imports come from EU countries – and this figure is higher still for beef, pork and sausage imports.

Imports of Meat in 2024 by Category and Source (EU or RoW) – Tonnes

Category	Subcategory	EU	Non-EU	Total
Beef	Unprocessed*	240,294	20,136	260,430
	Preparations & Processed Products	30,428	17,581	48,009
Pork	Unprocessed*	358,044	1,466	359,510
	Preparations & Processed Products	274,457	14	274,471
Poultry	Unprocessed	486,331	46,397	532,728
	Preparations & Processed Products	200,134	317,267	517,401
Sheepmeat**	Unprocessed*	10,606	65,459	76,065
	Preparations & Processed Products	1,044	0	1,044
Sausages - Unknown Species	Processed & Similar Products	154,712	583	155,295
Total		1,756,050	468,903	2,224,953

*Unprocessed subcategory includes offal (0206 codes)
** Sheepmeat category also includes goatmeat

Case Study 1 Importance of Diverse Trade Partners & Agile Responses

Foot & Mouth Disease (FMD)



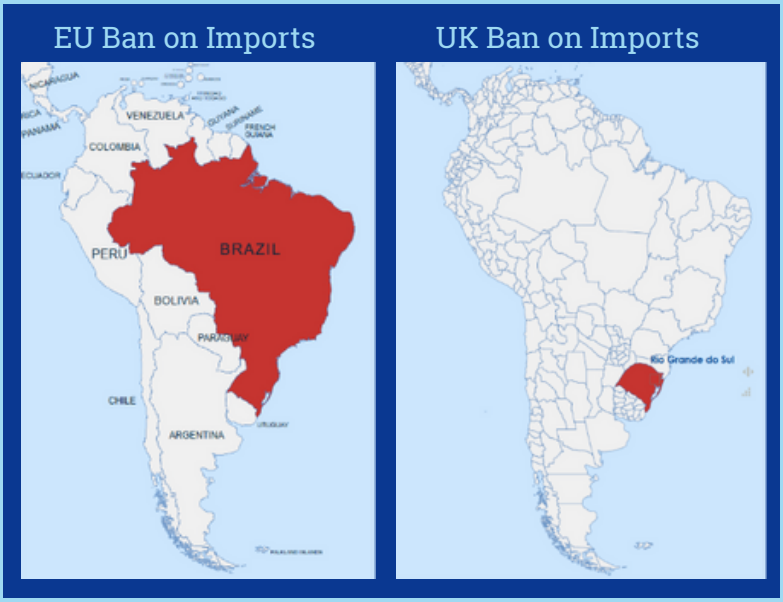
At various points in 2025, the UK implemented bans on meat imports from Germany, Hungary, Slovakia and Austria as a result of FMD outbreaks. In 2024, these 4 countries combined accounted for:

- 21% of all unprocessed pork imports to the UK
- 18% of all sausage imports to the UK

With Germany being the UK's single biggest supplier of unprocessed pork and sausages.

Key Takeaway: having a diverse range of pork supplying countries enabled businesses to pivot to alternative suppliers, minimising disruption to UK food supply.

Avian Influenza



In May 2025, Brazil notified a case of Avian Influenza. The UK banned the state of Rio Grande do Sul as a result of a regionalisation agreement. This ban was lifted in July.

By contrast, the EU lacks a regionalisation agreement with Brazil, and all poultry products from the entirety of Brazil were unable to be exported to the EU until legislation was published on 22nd September; even though Brazil declared country freedom from Avian Influenza in June 2025.

In 2024, Brazil provided 16% of all poultrymeat preparations & processed product imports to the UK. It was the UK's second largest single supplier of these products after Thailand.

Key Takeaway: UK agility in responding to the outbreak in a proportional, risk-based way through regionalisation minimised disruption to UK poultry supply and UK food security. EU poultry prices began to increase sharply in May 2025; the same time as the ban on Brazilian imports was introduced.

Case Study 2 Brexit & TRQ Apportionment

When the UK left the EU in 2020, the WTO quotas which were previously shared were split between the UK and EU, giving each party a share of the quota.

The split ('apportionment') was largely based on trade data from the previous few years - i.e. the share of product that was shipped to the UK and the share of product that was shipped to the EU.

However, due to some distortion in trade data which did not provide an accurate representation of pre-Brexit trade flows, in some quotas, the UK was given a much smaller share than the actual product volumes which were being sent to the UK. This meant that for some quotas, the EU retained the overwhelming majority of the quota size, and the UK was given a tiny share.

For other non-WTO quotas - such as the Chinese cooked duck quotas and Erga Omnes cooked chicken quota, these were classed as 'autonomous' and therefore not included in the Brexit legal commitments established by the WTO schedule, meaning the EU retained those quotas in full, and the UK received zero quota, reducing access for products from those markets and meaning they had to be imported at full duty - adding costs for UK consumers.

Quota	WTO Quota	EU-27 + UK Share	UK Share	EU Share
Argentina Hilton Beef	Yes	29,500t	111t (0.4%)	29,389t (99.6%)
Uruguay Hilton Beef	Yes	6,376t	770t (12.1%)	5,606t (87.9%)
Paraguay Hilton Beef	Yes	1,000t	0t (0%)	1,000t (100%)
China Cooked Duck (>57%)	No	6,000t	0t (0%)	6,000t (100%)
China Cooked Duck (<57%)	No	600t	0t (0%)	600t (100%)
Erga Omnes Cooked Chicken	No	5,000t	0t (0%)	5,000t (100%)

Case Study 3
Underutilised Quotas

Background: Even though quota access is available, there are many reasons why quotas may not be used.

1. System A & B Manufacturing Quota

The UK has a System A & B Manufacturing Quota for specific beef products which must be used for manufacturing, with an annual volume of 44,027 tonnes.

However, while other beef quotas are high in demand, this quota is hardly ever used, despite its quite substantial size. This quota has very specific processing requirements attached to it and has not made commercial sense to use.

Key Takeaway: When quotas have specific entry requirements which are not aligned with the commercial demands, it is unlikely they will be much utilised (if at all). Therefore there is >44,000 tonnes of beef quota going unused, despite other beef quotas being exhausted, and beef supply tightness leading to higher prices for consumers at present.

2. CPTPP Quotas: Comprehensive & Progressive Agreement for Trans-Pacific Partnership

Some CPTPP members have access to quotas to import meat to the UK. However they do not have veterinary approval and so these quotas cannot be used. These include:

- Beef Quota which increases annually to a limit of 13,000 tonnes
- Poultrymeat Quota which increases annually to a limit of 10,000 tonnes

See summary below of limitations for each country to usage of these quotas:

Country	Beef Access	Poultrymeat Access	Comments
Brunei	No	No	
Canada	Yes	Yes	Canada already has beef quota access which is not utilised. Canada does not export poultrymeat to the UK
Chile	Yes	Yes	Chile already has quota access for beef & poultrymeat which is hardly used
Malaysia	No	Limited	Only cooked poultrymeat products using raw material from approved third countries
Mexico	No	No	
Peru	No	No	
Singapore	Limited	Limited	Only cooked beef/poultrymeat products using raw material from approved third countries
Vietnam	No	No	