June 2025

UK Food Security

The Crucial Role of Imports:

An Overview of Current UK Import Access

Introduction

IMTA have produced this overview of current import access, as an update to our 2013 paper, to highlight the importance of meat imports which complement domestic production in supporting UK food security, consumer choice and the food manufacturing sector. Using government data from 2013 to 2024 and IMTA member feedback, we explore trends in UK meat imports from both the EU and Rest of World (RoW). We firstly examine the state of play for UK import requirements in the context of UK food security and current global volatility. This aligns with Labour's 2024 Manifesto recognition that '*food security is national security*'. To ensure food security, the UK needs both robust domestic production but also trade. Two-way trade for the meat sector is crucial for carcass balance and ensuring dependable options for imported supply to UK consumers but also export options to ensure maximisation of producer returns, which also supports stable pricing for UK consumers.

Why have we produced this paper now?

With the announcement of the UK government food strategy we want to ensure that the role of trade in supporting domestic production is well understood. Meat is a nutrient dense food and plays an important role in a balanced diet. While this paper will not focus on the food strategy in detail, we hope it provides useful context for officials in consideration of the Food Strategy workstream.

Following the pandemic and EU Exit and given current geopolitical challenges relating to the invasion of Ukraine and the uncertainty relating to various potential trade wars we felt it was timely to undertake an analysis of the UK's access to imports which are an essential and underacknowledged aspect of UK food security. We are hearing increasingly across the sector of challenges in accessing supplies of certain products especially for beef and for poultrymeat and we will consider this in detail within this paper.

The recent FMD outbreaks in Germany, Hungary & Slovakia have added pressure on access to supplies and demonstrate the need for the UK to ensure it has sufficient options for access to imported supplies which ensure enough product is available for all consumer and end user types (inc. manufacturers) where there is a shortfall in domestic availability. In this context it is important that we re-examine the UK's access to imported supplies including evaluating the UK's shares of the tariff rate quota apportionment which took place as a result of EU exit. This paper will highlight areas where we feel the UK access to imports needs to be addressed to bolster UK food security and we will make constructive recommendations for how these could be addressed.

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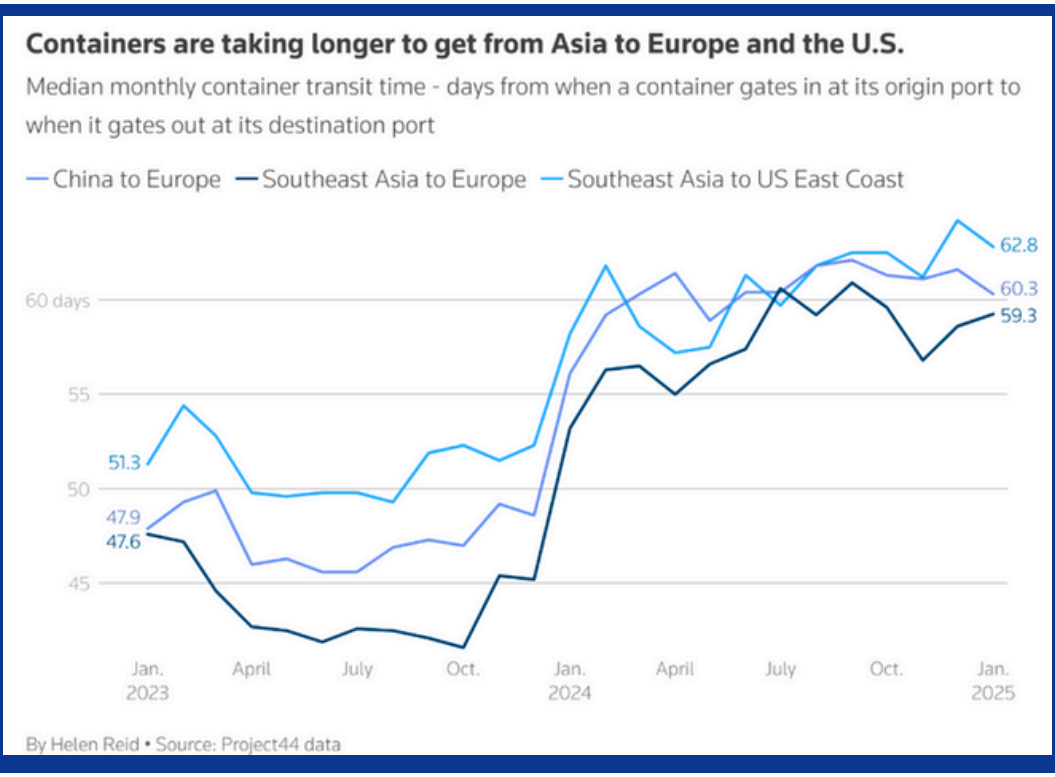
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Global Context

Over the last five years, supply chains have had to negotiate various crises which have created a volatile and uncertain trading environment. The **Covid-19 Pandemic caused severe disruption to trade**, as national lockdowns fundamentally altered consumer demand & purchasing behaviour. This coincided with pandemic-induced supply-side bottlenecks, as supply chains had to adapt to this increased demand while simultaneously negotiating labour shortages in key logistical operations such as ports, shipping and haulage. This resulted in port congestion and shortages of shipping containers and as a result, the price of these soared, fuelling consumer price inflation. For example, Drewry's World Container Index (a live measure of average global freight rates based on various maritime journeys) stood at just over $1,500 per 40-ft container in March 2020; by mid-September 2021, this had increased to almost $10,400 – a jump of almost 700%.

Shipping prices remained extraordinarily elevated when a second crisis hit – **Russia's invasion of Ukraine** sparked a surge in the price of energy, as many countries imposed sanctions on Russia, cutting ties with Russian oil & natural gas. Fertilisers – which rely on natural gas to produce – also shot up in price, as did cereal prices due to Ukraine's vital role in global crop & grain production. For the UK and broader global food supply chain, price squeezes were everywhere – producers and manufacturers faced massive input cost increases for fuel, energy & fertilisers, while the logistics sector faced unprecedented container prices, HGV fuel & cold storage costs.

Since then, the conflict in Gaza has led to Yemeni Houthi **attacks on vessels in the Red Sea** – resulting in shipping lines diverting around South Africa's Cape of Good Hope – which has put further pressure on container prices and caused significant additional journey times for Asian & Oceanian products destined for Europe. As per Reuters (January 2025), the number of container ships going through the Suez Canal in 2024 was down 75% vs 2023 and the chart below shows impacts on shipping times from rerouting:



The UK should consider the potential knock on impact of the **EU and Mercosur trade agreement** in relation to its food security. Better access for South American exporters to the EU market could make the UK less attractive as a destination, especially where quota access is very limited.

In 2025, we are also seeing a shift with some countries towards a more combative trade policy which uses tariffs (and threats thereof) as a negotiating tactic. The US under President Trump has announced a raft of tariff measures on various products with key trading partners including Mexico, Canada, China and the EU, which has led to trading partners considering their approach, whether through negotiation or retaliation with reciprocal tariffs and potential escalation to trade wars. Trade measures taken by the EU will always have potential for knock on direct and indirect ramifications on imports into the UK.

It is not clear currently what the implications might be in terms of global trade flows being displaced, but it is certain that the trading environment is facing new unpredictability and volatility. EU tariffs on animal feed for example would have a knock-on impact on input costs for poultry production - feed constitutes roughly 70% of poultry production costs, and the US is a major exporter of both corn & soy.

UK Context

These shocks have played into the cost-of-living crisis experienced by UK consumers. In the UK, food prices rose at their fastest rate for 42 years in the year to September 2022. **Food price pressures** for consumers were exacerbated by the increased prices in other household essential areas such as energy and electricity, and despite the recent easing of inflation, the FSA's latest consumer insights tracker reveals that even by September 2024, the top concern among consumers (87%) remains food prices. 23% of respondents were also worried about their household not being able to afford food in the next month. High energy costs also impacted business costs – the food trade is reliant on a cold chain which is highly exposed to energy prices. **ONS consumer price inflation (CPI) figures in the year to April 2025 indicate there is continued price pressure on meat; particularly for red meat above and beyond the broader CPI rate of 3.4%:**

Meat Type	UK Inflation Rate in Year to April 2025 (Source: ONS)
Beef	12.2%
Pork	5.0%
Lamb & Goat	13.8%
Poultry	3.2%

Despite these price pressures, meat as a nutrient remains a vital and ever-present part of the UK's diet – with 99% of UK households purchasing meat, fish & poultry in the year ending May 2024 as per AHDB.

Over the same period, the **UK has left the EU**, and since then checks and controls for trade between the two have been steadily introduced; for imports from the EU this culminated in the **Border Target Operating Model (BTOM)** which has introduced new administrative burdens and costs to UK-EU supply chains.

The EU remains the UK's primary partner for import of all meat types (excluding sheepmeat) and this is explored in more detail below – it is therefore vital that there are no unnecessary obstacles imposed on imports from the EU. There is a need to urgently review the BTOM for its impacts on costs, delays and UK food security, and where certain facilitations can be brought in to mitigate these impacts. This could have a positive impact on reducing costs that fuel food inflation – Labour's 2024 Manifesto committed to "*reduce food prices by removing barriers to businesses trading*". IMTA have made longstanding asks of government in this vein – including a review of the Common User Charge (CUC), the implementation of certificate cloning for imports from the EU, and a review of the government's IT systems to ensure they operate effectively for traders. These areas and others have added significant costs to traders for imports from the EU.

A UK government report "Critical Imports and Supply Chains Strategy" published in 2024 outlined that the BTOM "*will improve the efficiency of border processes by digitalising the border and continuing to streamline certification procedures*" and that "*The UK's Single Trade Window is a core part of the delivery of the Border Operating Model. It will provide a single digital gateway at the UK border for traders to complete their import, export and transit obligations, saving traders time and money by reducing the significant duplicative effort that is currently required to move goods across the UK border.*" As of May 2025, **these BTOM facilitations have manifestly not been realised**, and the much-vaunted Single Trade Window workstream has been paused.

It is worth also mentioning that although we refer throughout to 'The UK', due to the Northern Ireland Protocol and subsequently the Windsor Framework agreement, **Northern Ireland remains part of the EU Single Market and is subject to EU legislation** in a number of relevant areas; including animal health, customs and SPS controls. This has added complexity for supply chains and necessitated negotiation with the EU in order to ensure Northern Ireland maintains access to UK quotas (via the creation of NI-specific quota pots) and that goods sold in GB can continue to also be sold in Northern Ireland (via the creation of the NI Retail Movement Scheme).

With regard to UK food security, for which imports are a crucial ingredient, at the point of EU exit, the **UK and EU apportioned their access to import tariff rate quotas**. Owing to the free trade within the single market and customs union whilst the UK was a Member State, this led to significant limitations in the data which was used to base the TRQ apportionment. The so-called Rotterdam effect in particular meant that distilling the volumes of the quotas which supplied UK consumers and end users of imports was difficult to accurately ascertain. This has led to some examples of where the UK is arguably short of access to certain markets including Argentina, Uruguay and the US given how the quota was apportioned and also the loss of access to the grainfed beef quota which was not apportioned owing to the fact it was a compensation quota rather than a WTO lodged commitment. In this regard the recent announcement that promises reciprocal beef quota access between the UK and US in both direction is welcomed.

The UK has notably also struck **new trade deals including with Australia and New Zealand** and rolled over many EU agreements. These bring with them new import tariff quota access and we will consider that within this paper. The UK has also joined the Comprehensive & Progressive Agreement for Trans-Pacific Partnership (**CPTPP**) as of December 2024 – however, many of the CPTPP countries do not have veterinary access to export meat to the UK, and those that do (e.g. Chile, Australia & New Zealand) already have FTA quotas in place so this is unlikely, at least in the short-term to diversify supply sources. It is important to note that with any free trade agreement or quota, just because a quota exists does not equate to it being utilised.

The UK cannot be self-sufficient in meat (outlined in detail in the section below), and **ensuring we have a diverse range of trading partners helps to spread risk and ensure UK food security and consumer choice**. Food security relies on resilience & adaptability to supply chain challenges – and a strong source of imports is a key part of that. This is echoed in the government's 2024 Critical Imports and Supply Chain Strategy which comments that *"the ability for UK firms to source critical goods from a diverse range of suppliers is likely to be essential to ensure resilience"*.

We surveyed our members in March 2025 to understand their perceptions of any limitations on supply of meat to the UK market.

The following is a summary of member feedback:

Production in UK, Ireland and the wider EU is down and expected to decline further which is a concern.

Bluetongue and FMD restrictions have impacted on movement of product and restricted some areas for supply.

The Border Target Operating Model has seen increased costs to cover administrative aspects of document handling. Groupage movements have become much more complicated, costly and administratively burdensome since the introduction of the BTOM. Additionally, the inability to export RoW meat from the EU to GB due to vets in EU Member States feeling unable to certify it. Often UK customers will demand small volumes of meat from certain origins (steaks from the US for example) which is not economically feasible to ship direct to the UK. Prior to the BTOM, importers would ship direct to Rotterdam and clear the goods, with the bulk remaining in the EU and then the rest would be exported to GB but this is no longer possible.

With increased complications owing to this and UK rules on animal disease regionalisation (which are no longer aligned with the EU), this has meant some suppliers have stopped supplying the UK market. There are border checks internally within Europe which are delaying trucks as well as the checks happening at UK BCPs. The lack of clarity on what is or isn't allowed, heat treated or not etc and vets being clear on signing this off in the EU to import to the UK means things are more complicated.

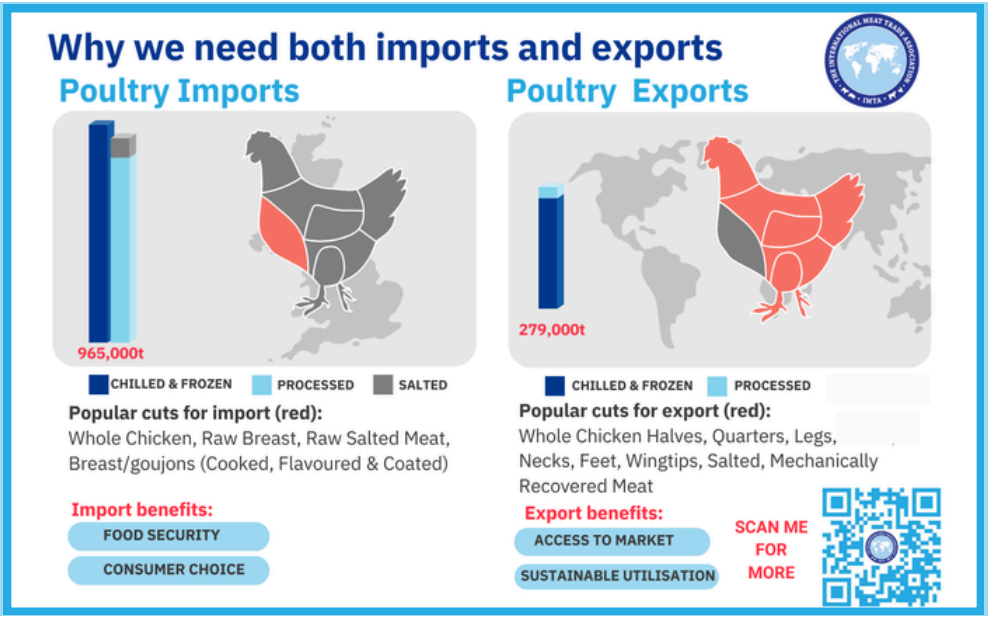
We acknowledge that since this survey of members, the UK has signed an agreement on 19th May 2025 at the UK-EU Summit which includes a commitment to work towards establishing a Common Sanitary and Phytosanitary Area – when achieved, this may help to mitigate some of the pressures traders outline above with regards to the BTOM.

The multitude of issues feeds into food inflation increases and risks UK food security. It also impacts on company profitability and loss of turnover which is a food security risk.

Food Security & the Self-Sufficiency Myth

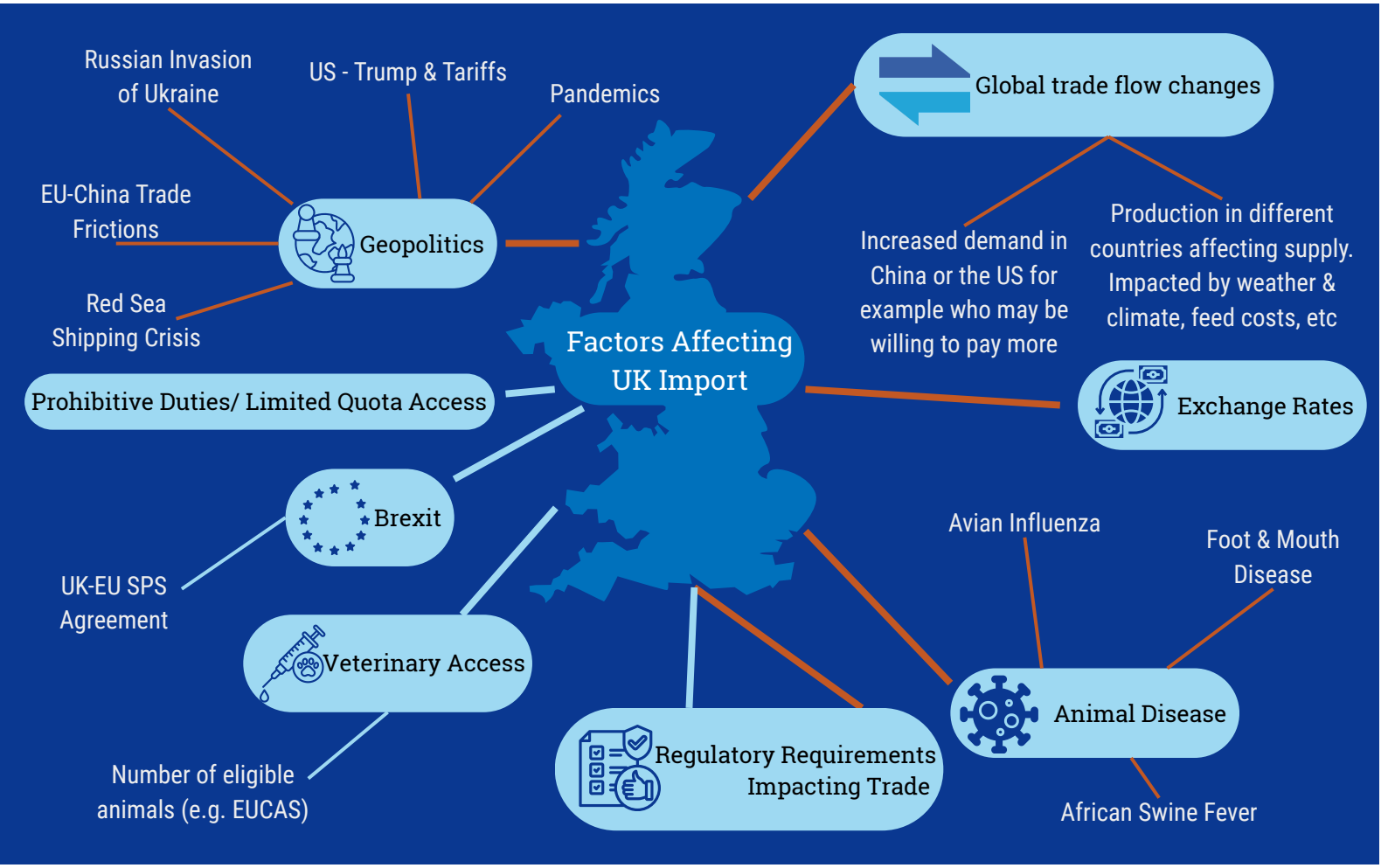
In response to global volatility, many such as the NFU have called for the UK to focus on increasing its self-sufficiency to boost food security. However, particularly for meat, imports play a vital role which complements domestic production, and two-way trade with a diverse range of importing and exporting partners is crucial for our food security. It will be crucial that government keeps this in mind in its development of its food strategy. The recent FMD outbreak in Germany and disruption to imports as a result, illustrates the pace at which access to food supplies can change and the need to have diverse sources of supply to be resilient against disease outbreaks both domestically and internationally.

Being over reliant on any one source for food – even if that source is domestic production – does not support UK food security. The characteristics of the UK – a highly populated island nation – means we have not been close to self-sufficient in food for a very long time. James Kane explained during a Westminster Forum event on food security on 28th November 2024 that during the Napoleonic Wars in the early 19th Century, Britain was forced to become more self-sufficient but this period was marked by periods of food shortage & famine. The highest self-sufficiency levels reached in modern history were in 1984 – however this was the result of a period of high subsidies and came at enormous cost (food waste and 'butter mountains').



Because UK **consumer preference is disproportionately for certain cuts**, two-way trade also enables us to import more of the cuts demanded by UK consumers and to export the other parts of the animal which are valued higher elsewhere – **this is known as carcass balance** (see illustration above). An example of this is the UK preference for chicken breast: were we to try to become self-sufficient in chicken, we would need to double our domestic production - and then find export markets for all of the additional non-breast products (e.g. chicken feet) that would be produced. Though it is crucial to ensure that the UK has a strong domestic production for poultrymeat there are limitations on increasing production due to the UK's geographic and resource constraints – with a recent example of planning officers rejecting a proposal for the expansion of a significant pork & poultry farm in Norfolk. This concept was recognised in the UK government's Food Security Report 2024 (pg. 145).

Consumer preference can also change over time – we outline some of the shifts in product categories over the last ten years in more detail in subsequent sections. It is therefore important to ensure we have a diverse range of supply sources to ensure there is flexibility to adapt to changing preferences and to preserve consumer choice. There are many reasons why a country may not export to the UK – beyond simply having veterinary access. For large exporting countries like Brazil, the UK is often a small market compared to China or the US, and obstacles to trade need to be considered in this context. Please find below a non-exhaustive illustration of some of these reasons, many of which are interconnected. We have also tried to highlight that for many of these areas, the UK has limited or no control (those in orange):



Seasonality is also an important consideration – the Northern and Southern Hemisphere supply chains balance seasonal demand. For example, the UK has high demand for sheepmeat during Easter – a time when UK production is relatively low. Being able to source lamb from Australia and New Zealand during these periods allows retailers and food service to meet the seasonal demand and deliver large volumes of consistent product over a short timeframe; something which would be impossible without imports.

Another factor to consider when we talk about self-sufficiency is the **different needs of market channels in the UK food sector.** All of the major supermarkets have 'Buy British' policies to varying degrees, where their fresh and own-brand meat offerings are generally sourced from British (and Irish) farms – this is particularly the case for beef, poultry and pork. Recently 8 major retailers have also instituted 'Best of British' sections to their online offerings to encourage more consumption of domestically produced food. See illustration of 'Buy British' policies below, from the Grocer (although please note this was published in May 2024 so may not necessarily reflect the latest situation):

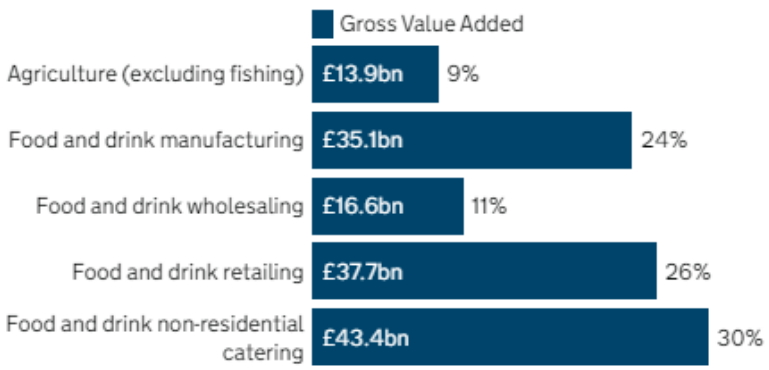
Supermarket	Aldi*	Asda**	Co-op	Iceland	Lidl	M&S	Morrisons	Ocado	Sainsbury's***	Tesco	Waitrose
Beef	All core range is 100% British	No comment	100% fresh and frozen	No comment	100% British	100% British	100% British	100% British	100% British or Irish	100% British or Irish	100% British or Irish
Lamb	No comment	No comment	100% fresh and frozen	No comment	No comment	100% British	100% British	33% British	Taste the Difference, SO Organic and Northern Highland lamb, is 100% British	Finest lamb is 100% British	100% British or Irish
Pork	Core range is 100% British	No comment	100% fresh and frozen	No comment	100% British	100% British	100% British	88% British	All core range is 100% British	100% finest pork cuts and all sausages	100% British or Irish
Chicken	Core range is 100% British	100% fresh chicken	100% fresh and frozen	No comment	100% British	100% British	100% British	100% British	100% British	100% fresh chicken	100% British or Irish

However, as outlined in IMTA's 2013 'Benefits of Imports' paper, other channels such as the **catering or foodservice sector traditionally need large volumes of a smaller group of cuts**, and are therefore more dependent on imports. The supply to these sectors needs to be consistent over a sustained period of time. The specification requires that steaks for example be uniform in size, shape, colour, fat cover etc. Because of the numbers of cattle slaughtered in any one abattoir in the UK, to collect a 20-tonne consignment like this would be extremely difficult, but with the larger throughput of animals in South America the quantity could be packed in a matter of days by one plant.

Food & drink is the largest manufacturing sector in the UK, and it relies on imports alongside domestic production as key inputs. Imported meat is used by businesses who produce ready meals, pies and burgers etc., for retail butchers and wholesale markets. This supports employment throughout the food supply chain: boning, cutting, retail packaging, manufacture, catering butchers, retail butchers and wholesale markets. The agri-food sector in the UK employs around 4.4m people (14% of the UK's total workforce) - imports and domestic production each play important roles in different channels, and complement one another to ensure a year-round consistent supply of meat across the various food sectors.

The broader agri-food sector is a crucial contributor to the UK's national economy. According to Gov.UK, In 2022, the Gross Value Added (GVA) by the sector was £146.7bn – see a breakdown which illustrates the vital contribution made by non-retail channels such as manufacturing, wholesale & catering, which constitute 65% of the total GVA:

Figure 14.1 Gross Value Added of the agri-food sector, 2022 (£ billion)



Looking Forward - EU & UK Supply Constraints

In addition to the above, there are certain constraints that limit the amount of food the UK can produce. The government's Land Use Consultation, published in January 2025 outlines that 9% of the UK's agricultural land may need to be repurposed (pg. 15). Although the government note that "*the impact of these land use changes on domestic food production will be offset by productivity improvements*", this suggests domestic food production levels will be maintained rather than increased. We have shared our carcass balance infographics as part of the land-use consultation in order to illustrate the fact that total volume production of livestock does not equate to UK consumption of beef, lamb, pork or poultrymeat given that we export certain cuts and need to import to complement domestic production.

The UK Food Security Report 2024 highlighted some other structural issues within the domestic sector which are of concern – including a high proportion of older farmers, and labour shortages in the meat processing industry, notably abattoir workers & butchers, as well as the veterinary profession. The report notes the labour shortage issues have been exacerbated since Brexit, and as per AHDB (April 2025), "*the UK meat processing sector saw employment in the industry decline at an average annual rate of 3.5% between 2019 and 2024*."

As per ONS's most recent statistics, the UK population in 2023 was 68.3m. The ONS project the population to reach 71.9m by 2030 and 74.8m by 2040, and this growing population will demand more food. 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** as per the below table:

Projected UK Annual Consumption (Tonnes)	2023	2033	Projected Change 2033 vs 2023
Beef & Veal	1,056,600	1,089,940	+34,340 (3.3%)
Pigmeat	1,389,920	1,371,470	-18,430 (1.3%)
Poultrymeat	2,278,910	2,509,600	+230,700 (10.1%)
Sheepmeat	259,740	261,310	+1,570 (1.5%)

Source: OECD-FAO Agricultural Outlook 2024-2033 Database. All figures in Carcass Weight Equivalent (CWE) except poultrymeat which is on Ready to Cook (RTC) basis

Based on the above, UK sheepmeat consumption is projected to remain broadly similar over the next ten years, with pork consumption forecast to decline slightly; whereas beef & veal consumption is projected to increase by almost >34,000 tonnes and poultrymeat by >230,000 tonnes.

For **poultrymeat** in particular, there are likely to be limitations on the amount UK domestic production can increase to meet the rising demand going forwards – in addition to geographical land use limitations, the Better Chicken Commitment (of which several UK major retailers and restaurants have signed up to) commits to a reduction in stocking density & breeding changes which reduces the volume that can be produced within the current UK production system parameters, and would necessitate significant expansion in poultry housing in order to maintain production levels. As per a recent article published in Sustainable Agriculture for Food & Nutrition Security (April 2025), "*Broiler (meat) chicken numbers fell by 3.5% between 2023 and 2024. This was before the market-driven depopulation of poultry meat housing in early 2025 (from 38 to 30 kg/m2)*."

Similar commitments are being made in the EU - analysis of the impacts of fully rolling out the European Chicken Commitment initiative across the EU finds there could be a reduction of 44% in overall EU poultrymeat production and an increased production cost of 37.5% per kg of meat compared to current standard production methods. It also finds that if the EU were to try and maintain current production levels, additional poultry housing would be required at a significant cost of €8.24 billion. WATT Poultry also note that chicken prices in Europe reached a record high in March 2025.

For **beef,** AHDB analysis in February 2025 projects UK domestic production to decline by 5% year on year in 2025, while consumption is projected to increase by 1%. AHDB add that "*reductions in cattle supply are also expected to continue into 2026*", and 2025 Quarter 1 beef production is down 3.5% year on year. The Scottish Meat Wholesalers Association also warned in January 2025 that "*domestic supplies are nearing a critical tipping point, bringing the UK to the brink of gaps in supply at certain times of the year*". AHDB analysis of the longer-term UK beef production outlook concludes "*the most likely forecast for prime cattle slaughter is a 6.3% reduction by 2030 (compared with 2023 actual figures)*".

Table I – EU Beef Carcass Prices as of Week 6 of 2025

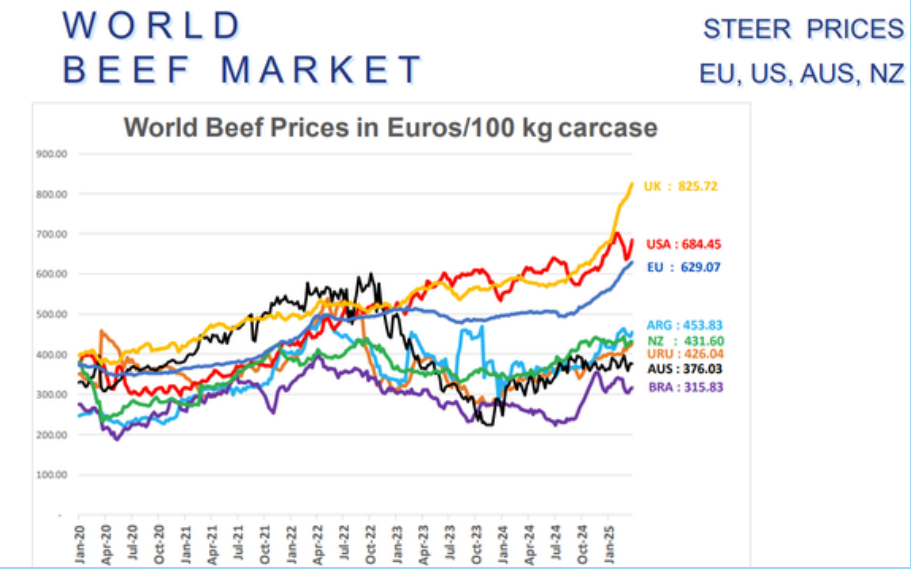
Carcasse

Category	Price for week 2025-21	Last week	Last month	Last year
A URO	641.5	-0.1%	2.4%	28.3%
ACZ URO	655.0	-0.0%	1.6%	29.8%
C URO	758.3	0.2%	-0.7%	43.8%
Z URO	634.9	0.0%	0.6%	24.9%

Source: European Commission – note that the codes 'A', 'C' & 'Z' above refer to carcass prices for young bulls, young cattle, bulls & steers. See more here

There are also indications of tight beef supplies in the EU – with carcass prices rising significantly in the last year. See this in the table above as per the European Commission beef & veal dashboard showing an 25-44% price increase in Week 21 of 2025 vs the same period in 2024.

Beef prices in the EU and UK are currently very high – see below chart from the European Commission's Beef & Veal Market Situation (April 2025) showing the significant price increases in the last couple of years:



As per AHDB, *"beef supply across the EU is forecast to fall in 2025, potentially lending further support to prices"*. AHDB cite *"environmental regulation and an ageing farmer population"* as some drivers of tightening EU beef supply in 2025.

In the longer term, Ireland, which is by far the UK's primary source of unprocessed beef has committed to achieve climate neutrality by 2050, and reduce agricultural emissions by 25% by 2030 relative to 2018 levels. A joint report by the Irish Climate Council & Teagasc modelled various scenarios on what achieving these targets may require of the agricultural sector to 2050, all of which model beef production declining to various degrees:

- Scenario 1: cattle numbers decline by 7% and beef production declines by 11%
- Scenario 2: cattle numbers decline by 22% and beef production declines by 26%
- Scenario 3: cattle numbers increase by 1% and beef production declines by <5%

For **pork,** Denmark – the UK's second largest source of pork imports - have agreed to introduce a carbon tax on livestock producers from 2030, and according to the British Agricultural Bureau, such a policy may directly result in a decrease in pig production volumes (-3.4%) with 26% of the tax applied to pigs being passed through the supply chain.

For **sheepmeat**, AHDB's UK production analysis has outlined a *"baseline forecast for clean sheep slaughter is a 1.8% reduction by 2030 (compared with actual 2023 figures)"*. 2025 Quarter 1 lamb production is down 4.5% year-on-year as per AHDB.

In terms of reliance on the EU, this varies by meat type & product. Roughly 80% of our total meat imports come from the EU, and this figure is higher still for beef and pork (see more detail on page 10) - therefore close consideration needs to be paid to EU production trends for the future. The **impact of implementing policies relating particularly to sustainability** should also be factored into UK food security thinking – while IMTA are supportive of the intent of such policies, their effects on production & imports need to be considered in the context of food availability and food security as well as population health considerations.

A 2022 study by Wageningen University found that "*achieving the EU's Green Deal objectives may lead to a reduction of livestock production in the order of 10 to 15 percent*". We have also heard feedback from a member that many companies in Europe are reducing their beef production in exchange for financial incentives from the European Commission.

Please see the projected changes in EU production to 2035 according to the EU's latest Agricultural Outlook Report:

Meat Type	EU Production Volume Change in 2035* vs. 2022-24 Average
Beef & Veal	-450,000 tonnes (-6.7%)
Pigmeat	-1,192,000 tonnes (-5.6%)
Poultrymeat	+770,000 tonnes (+5.7%)
Sheep & Goatmeat	-46,000 tonnes (-7.8%)

*Based on gross indigenous production statistics, pg. 70

The EU projects significant declines in all EU meat production to 2035, except for poultrymeat production which is forecast to increase. The report also predicts "*EU prices for meat products will generally be increasing and continue to reflect increasing production costs, lower supply*". The report (pg. 37-40) also **forecasts exports to the UK to decline for all meats except poultrymeat**.

Additionally, the risks of animal disease & trade restrictions are ever-present. The outbreak in January 2025 of Foot & Mouth Disease (FMD) in Germany is a timely reminder – in 2024, Germany was our single largest source of unprocessed pork, our single largest source of sausages, and our fifth largest source of processed pork (e.g. hams, bacon). Although the UK implemented regionalisation in March 2024, there has still been significant supply disruption, and there have now been further outbreaks in Hungary and Slovakia too, which has led to bans on both of those countries as well as Austria – we have had reports from members that the FMD outbreaks had impacts on prices.

Ensuring the UK has access to alternative sources of supply from non-EU countries will be crucial to protect UK food security going forwards.

Also worth noting is the recent **EU-Mercosur** political agreement reached in December 2024 in relation to their long-running negotiations on an FTA. While there is no entry into force date outlined yet, the **agreement may impact on South American trade flows to the UK**. The agreement includes quotas for Mercosur countries to export beef, pork & poultrymeat to the EU, either at reduced duty or duty-free. Notably, within 5 years of the agreement, Mercosur countries will enjoy a combined quota volume for chilled & frozen beef of 99,000 tonnes and a combined quota volume of boneless & bone-in poultrymeat of 180,000 tonnes.

The subsequent sections will look more closely at the import statistics for each meat type since 2013, as well as including feedback from members on their current ability to access imported meat.

Import Statistics: Overview

Note about the data in this & subsequent sections: All of the following data unless otherwise specified is derived from HMRC's trade database. Please refer to Annex III for context and considerations about HMRC's data which should be borne in mind for the following sections.

In the following sections, we often differentiate the meat by whether it is unprocessed (e.g. chilled or frozen – like chicken breast or steaks) or processed (e.g. prepared, cooked, salted, cured – like ham or corned beef). We will seek to maintain consistent terminology, and specify when we are talking about both processed & unprocessed combined. For more information on the data methodology used for the rest of this paper & how IMTA categorised/grouped the CN Codes by species, please refer to Annex I.

UK Meat Supply

Please find below a table summarising the UK's production, imports and exports of all meat types (incl. processed meat) from 2022-2024.

UK Meat Supply (000's tonnes)	2022	2023	2024
Production	4,236	4,084	4,191
Imports	2,213	2,209	2,295
Exports	722	595	607
Consumption	5,727	5,699	5,879

Sources: Beef, pork and sheepmeat data provided by AHDB. Poultrymeat production data from Gov.UK, poultrymeat imports & exports data from HMRC. Consumption calculated based on production plus imports minus exports.

In 2024, meat imports constituted 39% of UK overall meat consumption.

Within the meat categories, this figure is significantly higher for pigmeat and significantly lower for sheepmeat, as this is the only meat species of which the UK is a net exporter (the UK is a net exporter of specific products too, such as offal). These figures provide a more accurate picture of the role of imports in UK food security than the more simplistic 'production/supply ratio' which is often used, as it accounts for exports and the carcass balance element.

UK Meat Supply by Type & Source

Please find below a table illustrating the imports by species, source (EU or RoW) and whether meat is unprocessed or processed. Please note that 'sheepmeat' includes goat products as Ovine & Caprine are grouped together for many CN codes – for more information on how the data has been categorised, please refer to Annex I.

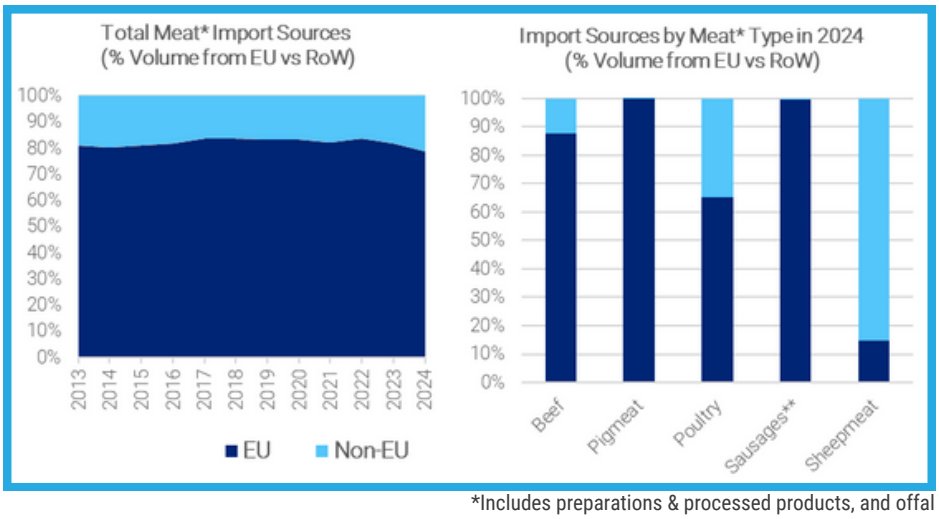
Table: Imports of Meat in 2024 by Category and Source (EU or ROW) - Tonnes

Category	Subcategory	EU	Non-EU	Total
Beef	Unprocessed*	240,294	20,136	**260,431**
	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	**532,727**
	Preparations & Processed Products	200,134	317,267	**517,401**
Sheepmeat**	Unprocessed*	10,606	66,459	**77,066**
	Preparations & Processed Products	1,044	0	**1,044**
Sausages - Unknown Species	Processed & Similar Products	154,712	583	**155,295**
Total		**1,756,050**	**469,903**	**2,225,953**

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

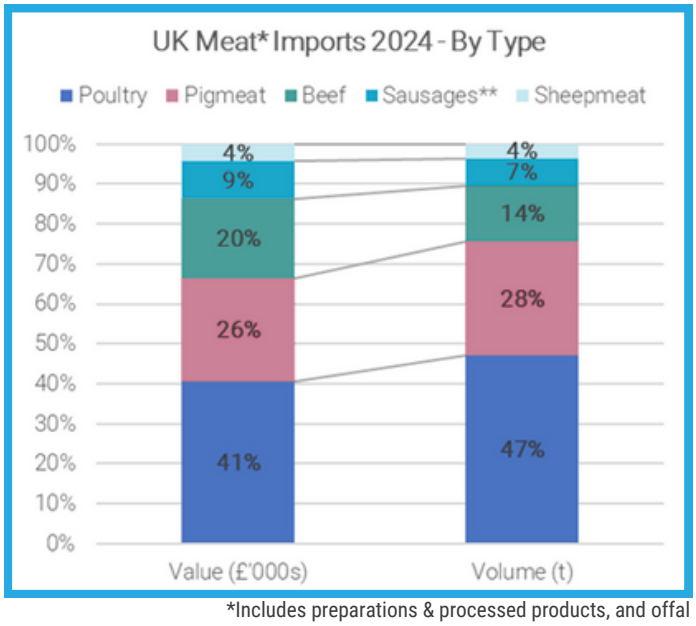
Below are two charts showing how much meat (incl. processed meat) in volume terms is imported from the **EU vs the RoW** – for all meat since 2013, and for each meat type in 2024. For all meat combined, the figure fluctuates year to year but generally speaking since 2013, **roughly 80% of the UK's imported meat comes from the EU** (noting that this figure may be influenced by the 'Rotterdam Effect'). However, since 2022 this figure has slightly declined, as imports from non-EU countries have increased significantly while imports from the EU have declined slightly – **between 2022 and 2024 for example, non-EU imports of all meat rose by 33.4%**: from 352,247 tonnes to 469,903 tonnes, driven largely by increases in poultrymeat imports. **At the same time imports from the EU decreased by 1.5% from 1,783,010 tonnes in 2022 to 1,756,050 tonnes in 2024**. Though difficult to delineate whether this is due to more direct RoW to GB imports rather than RoW imports coming to the UK via Rotterdam, the figures suggest there has been an increase of RoW to GB imports.

This is also despite all imports from the EU benefiting from duty-free access, whereas imports from RoW sources have to be either imported at full duty (which is often economically unfeasible) or under a limited import quota scheme or under the benefit of an FTA. The EU/Non-EU balance differs by meat type, with the vast majority of pork (unprocessed & processed) & sausage imports coming from the EU, while sheep meat imports predominantly come from RoW, and a more balanced mix for poultrymeat:



*Includes preparations & processed products, and offal
**Sausage species is not defined

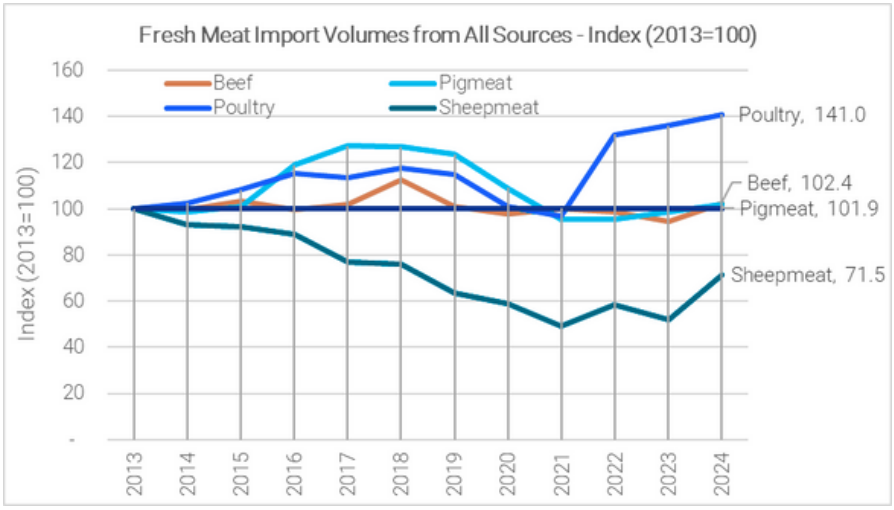
Please find to the right a chart illustrating the breakdown of meat (including processed & offal) imported into the UK in 2024, by both volume and value. Poultry was the most imported meat, accounting for almost half (47%) of the volume of all meat imports and 41% of the value. This is a significant shift since 2013, when poultrymeat was the second most imported meat in volume terms, after pigmeat.

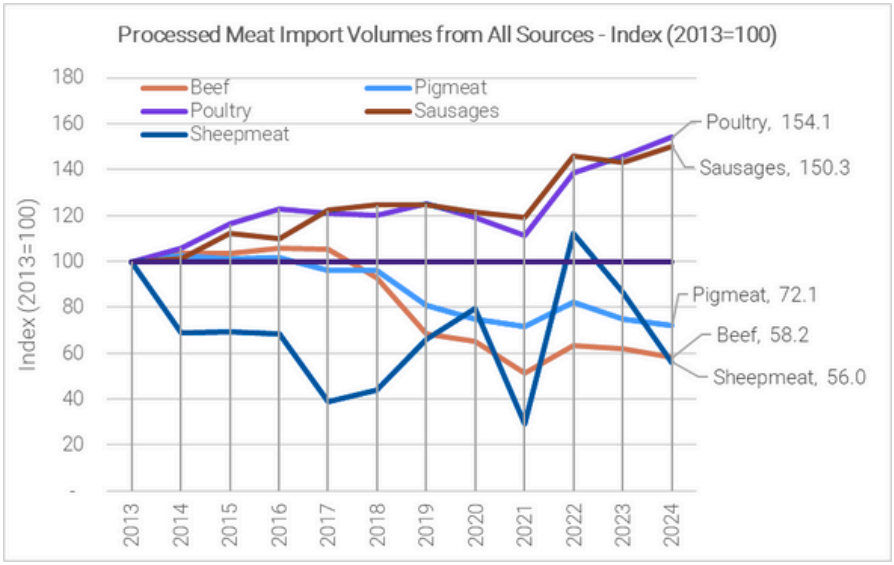


*Includes preparations & processed products, and offal
**Sausage species is not defined

Volume of Imports Over Time

Imports of all meat in 2024 (2.23m tonnes) were 11.5% higher than imports in 2013 (just under 2m tonnes) – an increase of 229k tonnes. Within that overall figure, imports of different meat types demonstrated different trends over the last 10 years, which is illustrated in the index graphs below. (Please note that "sausages" are products under the 1601 code for which the species in not defined – it is likely that many of these are pork, but also include beef, chicken and sheepmeat)





For **unprocessed meat, beef and pigmeat imports in 2024 remained similar in volume to 2013 levels, while sheepmeat imports were down 28.5%** (-30.6k tonnes). **Unprocessed poultrymeat imports have increased significantly** since 2021, and were 41% higher (+155k tonnes) in 2024 than 2013 levels.

For **processed meat imports, 2024 sheepmeat, beef & pork imports are down on 2013 levels, while processed poultrymeat & sausages had both increased** by >50% over the period, with particular spikes in 2021-2022.

The increase in overall poultrymeat imports (unprocessed and processed) between 2013 and 2024 totalled 336,600 tonnes.

Import Statistics by Meat Type

This section will explore each meat type in more detail. When assessing change over time, 2024 levels will be compared to the 2013-2015 average (unless otherwise indicated). This is to avoid comparing to one year (e.g. 2013) in order to smooth out potential anomalies or short term fluctuations, and is standard practice for organisations such as the FAO when presenting and comparing data.

Beef & Veal



Imports of beef & veal (incl. processed) from all sources in 2024 were down 9.7% to 308,440 tonnes vs the 2013-2015 average (341,459 tonnes). Below are the top 10 exporters of beef & veal (split by 'unprocessed' and 'processed') to the UK in 2023. The majority of unprocessed beef (75%) comes from one country – **Ireland** – with high volumes from other EU trade partners. Notable Non-EU sources of unprocessed beef include **Brazil, Uruguay, Australia and New Zealand**. Brazil is the UK's main import source of processed beef (i.e. beef products or preparations), almost all of which (17,137 tonnes) is corned beef.

Unprocessed Beef Top 10 Sources	**2024 Imports** (Tonnes)
Ireland	194,593
Poland	16,287
Netherlands	10,642
Germany	5,857
Australia	5,516
Brazil	4,915
New Zealand	4,129
France	3,663
Uruguay	3,165
Italy	2,425

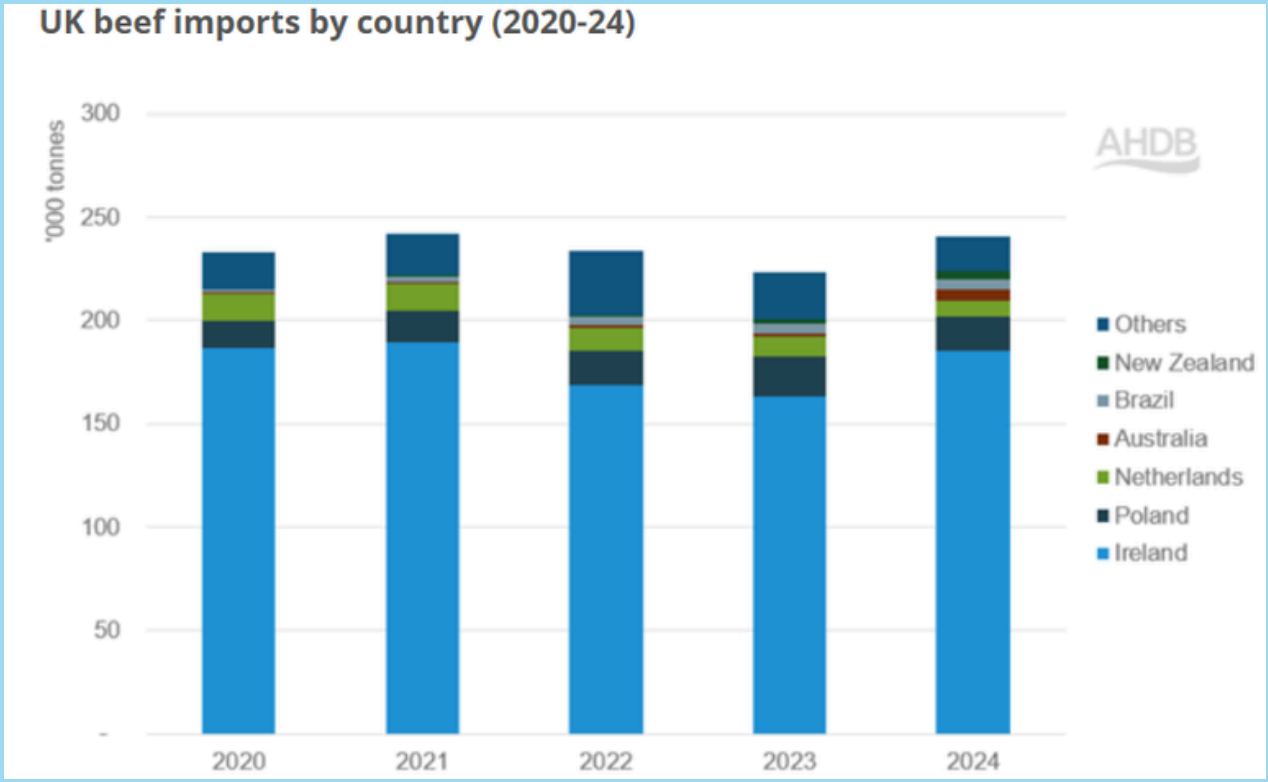
Processed Beef Top 10 Sources	**2024 Imports** (Tonnes)
Brazil	17,507
Ireland	15,194
Denmark	2,621
Poland	2,614
Germany	2,339
Sweden	2,315
France	2,132
Netherlands	977
Belgium	931
Spain	412

Most UK supermarkets have commitments to stock exclusively British or Irish unprocessed beef, while beef from other countries often fills specific niches (e.g. corned beef or specific catering steaks from Brazil or high quality beef for high-end restaurants from Japan or Australia). Brazil is the major global supplier of corned beef – in 2011, it constituted 80% of the global supply of canned meat (Beefpoint).

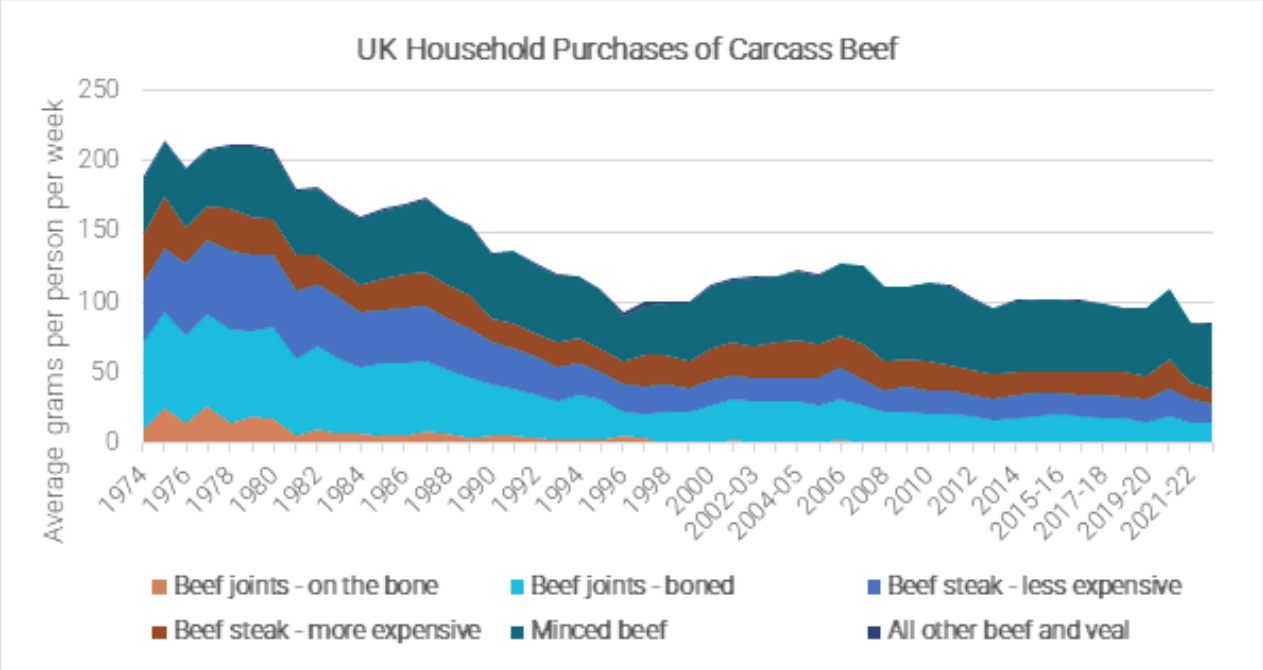
In terms of specific trade partners, imports of beef (unprocessed & processed) from **Australia and New Zealand** have increased between 2022 and 2024 albeit from a low base – see table below. This is likely in part due to the FTAs with the UK which came into force in May 2023. However, the volumes are still relatively low compared to imports from the EU for example.

Beef Imports (tonnes) from:	2022	2023	2024	% Change (2024 vs 2022)
Australia	869	1,905	5,516	+535%
New Zealand	977	1,893	4,155	+325%

AHDB (February 2025) note that Australia & New Zealand "*combined still only represents 4% of the total imported volume in 2024*" – see their chart below outlining the UK's main suppliers. We can also see from quota usage figures that the Australia & NZ FTA quotas are not anywhere close to being fully utilised, far from the initial fears from some of a 'flood of imports' from these countries. **It is important to recognise that just because quota access is available does not mean it will automatically be used**. There are multiple factors at play about whether a quota is attractive to use.



The long-term trend for UK beef consumption over the past 50 years has been an overall per capita basis decline, although per capita consumption is forecast to remain broadly similar up to 2033 as per OECD-FAO. See chart below using data from Defra's Family Food Survey showing household purchases between 1974 and 2023 (note this does not include eating out in restaurants etc). The chart illustrates the enduring popularity of beef mince, and the decline in retail purchases of beef joints on the bone. This is likely due to the versatility and relative affordability of mince compared to other beef products. One member informed us in March 2025 that the demand for mince coupled with the lack of domestic supply was leading in some instances to fillet steak being used to make mince.



*Carcass meat only - does not include meat products derived from beef

Notable Product Trends 2013-2024

One of the few beef product categories which increased in volume over the period was frozen, boneless beef (0202 30) – this category was marked by a decline in imports of frozen boneless forequarters which was more than offset by a substantial increase in frozen boneless cuts. Imports of chilled carcasses & half-carcasses declined over the period too, from an average of 31,891 tonnes in 2013-15 to 18,759 tonnes in 2024 (-38%).

Another category of note is offal imports. This category saw a notable value increase over the period with the value per tonne of chilled & frozen offal (0206 1098 & 0206 2999) increasing from £342 per tonne in 2013 to >£2,000 per tonne in 2024. A common explanation from IMTA members suggests this could in part be explained by higher competition from the petfood sector due to increased demand. Along with frozen boneless beef, frozen offal (excluding tongues and livers - 020629) was one of the few categories which saw an increase in import volume over the period – although the increase was counterbalanced by a corresponding decrease in fresh offal imports (0206 1098).

Product Category (HS-6 or HS-8 Code)	Notable change in 2024 vs 2013-15 Ave
0202 3090 - frozen bovine boneless meat (excl. forequarters)	37,167 tonnes → 71,111 tonnes in 2024 (+91%)
0206 29 - frozen bovine offal (excl. tongues & livers)	4,156 tonnes → 14,193 tonnes in 2024 (+241%)
1602 50 - prepared or preserved bovine meat (e.g. corned beef)	74,468 tonnes → 47,513 tonnes in 2024 (-36%)

Current Difficulties for Importers

AHDB analysis from February 2025 highlights that UK domestic beef production is due to decline 5% in 2025 year-on-year and that "*UK beef imports are expected to rise by 12% to compensate for reduced domestic production. Imports from Ireland, the UK's largest supplier, are likely to see the most significant increase.*" As mentioned in the previous section however, Ireland's climate neutrality goals are likely to see a decrease in beef production over the longer term. AHDB also note that the GB cattle population fell in 2024 for the tenth consecutive year, mostly due to the shrinking beef herd. One member informed us in March 2025 that "*any supply (of beef) is needed at the moment due to lower local/Irish flocks and herds.*" From a food security standpoint the UK government needs to think about both our domestic and imported supply options.

As per The Times (March 2025), shortages of cattle in the UK have contributed to increasing beef prices in restaurants. The article also notes the increased cost of importing beef from Argentina since Brexit due to the UK's only taking a small TRQ share of 111t of the Argentine Hilton quota as well as exclusion from the EU's grainfed beef quota– meaning an additional duty of £2.51 per kilo on imports into GB.

Member feedback also notes the following:

Quota regulations when supplying Northern Ireland is a limiting factor on supply.

Global demand driven by the US is high causing supply shortages and surging prices.

UK end users of imports such as food service and manufacturers who were previously able to maintain a UK/Ireland/EU only supply are now having to look at other origins in order to maintain supply levels. Supply security has never been more important that it is now.

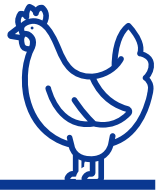
The supply of beef has reached a critical point due mainly to the shrinking UK, Irish and wider EU herd numbers which looks set to continue. Importers are turning to rest of world for beef supply such as Australia, New Zealand, South America. However, there are limits on the amount of cattle in these origins that is eligible for EU or UK export.

Uncertainty around how EUDR will affect trade flows and supply availability.

The inability of the Dutch authorities to permit recertification of rest of world beef to the UK has limited the ability to move product from origins such as the US. (A recent change by the Dutch authorities should see this route resume).

There is very limited Hilton quota for Uruguay and also for Argentina which limits supply from South America. There is no quota for Paraguay.

Poultrymeat



Imports of poultrymeat (unprocessed & processed) from all sources in 2024 were up 39.6% in volume terms vs the 2013-2015 average – an increase of almost 300,000 tonnes. Below are the top 10 exporters of poultrymeat (including processed products) to the UK in 2024. Compared to beef and pork, poultry imports are more of a mixture of EU and RoW sources – unprocessed poultrymeat primarily comes from the EU, with Poland and the Netherlands being key suppliers, whereas the main suppliers of processed poultrymeat are Thailand and Brazil. Poland produces 1/5th of the EU's chickens and accounts for 1/3rd of EU poultrymeat exports – and it has experienced a number of avian influenza outbreaks in 2025 which has impacted on production & trade. In January & February 2025, Poland produced 459,000 tonnes of poultrymeat – less than half the volume produced in the same period in 2024 (950,000 tonnes).

Processed Poultrymeat Top 10 Sources	**2024 Imports** (Tonnes)	**Unprocessed Poultrymeat** Top 10 Sources	**2024 Imports** (Tonnes)
Thailand	191,945	Poland	186,362
Brazil	82,008	Netherlands	144,497
Poland	76,075	Belgium	35,252
China	38,821	Ireland	32,112
Germany	37,491	Ukraine	28,025
Netherlands	25,720	Germany	25,116
Ireland	22,626	France	16,178
France	11,638	Romania	13,217
Hungary	8,205	Italy	11,908
Belgium	4,847	Spain	11,209

Non-EU countries provide specific niche products – more than 90% of the processed product coming from Thailand (161.5k tonnes) are chicken products or preparations, the bulk of which are cooked chicken breast. This is due to high UK consumer demand for breastmeat which UK domestic production is unable to meet. These products are often imported for foodservice (e.g. chicken nuggets or tenders) and as ingredients for ready meals & sandwiches and therefore directly support the UK food manufacturing sector.

Brazil is a major source of this product too, as well as salted chicken. These products are often imported for foodservice (e.g. chicken nuggets or tenders) and as ingredients for ready meals & sandwiches and therefore directly support the UK food manufacturing sector. In May 2025, Brazil notified of an outbreak of Avian Influenza. The UK SPS Assurance Office has taken an agile, measured & evidence-based approach in agreeing to regionalisation at the state level, and this is crucial to support UK food security. By contrast, the EU and some other countries do not have regionalisation agreements with Brazil, meaning there is a ban on exports from the whole of Brazil to those destinations. AI outbreaks around the world means it is key the UK has a diverse range of supplying options.

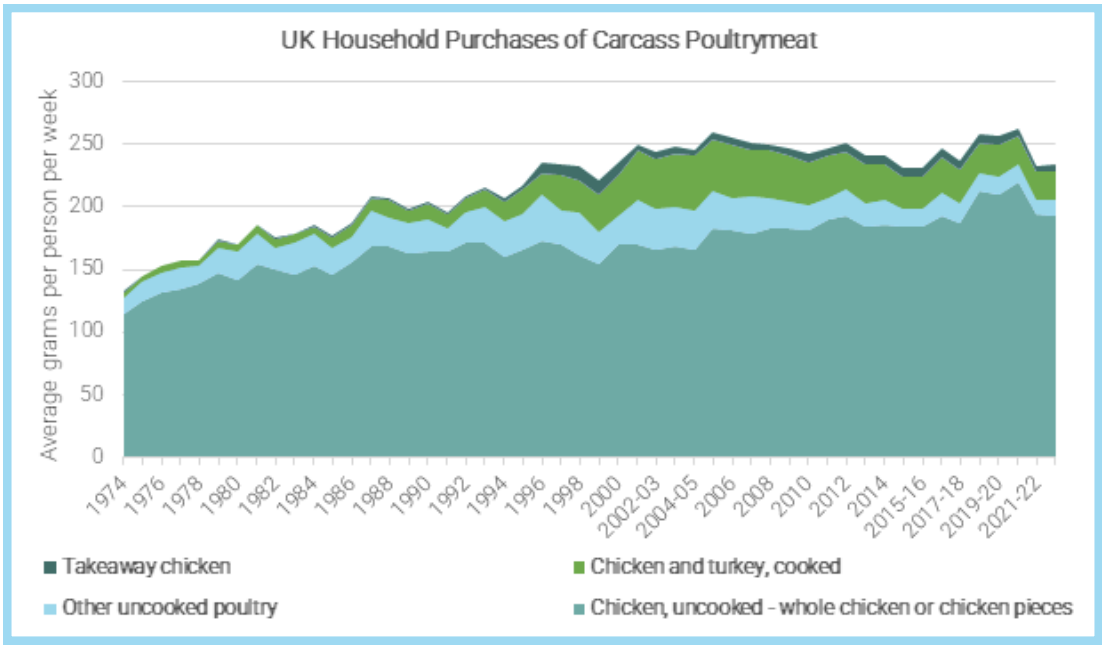
There appears to be a recent trend towards an **increased share of poultrymeat coming from non-EU rather than EU sources - however there will likely be an element of a move to direct import rather than movement via Rotterdam as part of this, especially given the difficulty in getting product recertified since the introduction of the BTOM.** This trend may also reflect the better ability of non-EU sources to meet the UK's increasing demand, as well as persistent AI outbreaks in the EU. See table to the right:

However, as this is only based on data from the last three years it is difficult to draw any conclusions about whether this trend will continue.

Proportion of UK poultrymeat* imports coming from:	2022	2023	2024
EU	72%	69%	65%
Non-EU	28%	31%	35%

*All poultrymeat - unprocessed and processed, including offal

The long-term trend for UK poultrymeat consumption is an overall per capita basis increase, and this is expected to continue going forwards. See chart below using data from Defra's Family Food Survey showing household purchases between 1974 and 2023 (note this does not include eating out in restaurants etc). This chart illustrates the UK consumer's growing appetite for poultrymeat.



Notable Product Trends 2013-2024

The predominant product category which drove the increase in total poultrymeat import volume between 2013 and 2024 was **prepared or preseved chicken meat (1602 32 product)**, volumes of which increased from 270,305 tonnes (2013-15 ave) to 455,763 tonnes by 2024. (+ >185,000 tonnes). This category alone accounted for 62% of the overall increase in poultrymeat imports. A large proportion (73%) of this category is cooked or prepared chicken product containing >57% meat (1602 3219) – this is often cooked chicken breast, which is demanded by UK consumers in increasing quantities – member feedback suggests this is due to the increased demand for convenince food among UK consumers.

One other category also saw significant growth in import volumes over the period was **chilled chicken cuts (0207 13 product)**, which increased from 165,835 tonnes in the 2013-15 average to 307,009 tonnes in 2024. Within this category there were some interesting shifts – bone-in breast (0207 1350) accounted for 29% of all imports of chilled chicken cuts in 2013, but by 2024, this share had dropped to just 2%. Conversely, over the period boneless cuts (0207 1310 - which includes boneless breast) increased its share of this category from 55% in 2013 to 74% in 2024. The same trend is not evident for non-breast cuts, as imports of other bone-in cuts increased over the period.

Additionally, imports of chilled and frozen chicken & turkey offal (including liver) increased notably over the period, albeit from a low base. Average imports 2013-15 were 3,186 tonnes, which had increased to 17,754 tonnes by 2024. IMTA member feedback suggests this may be due to increased demand from the petfood sector.

Product Category (HS-6 or HS-8 Code)	**Notable change in 2024 vs 2013-15 Ave**
Cooked/Prepared Chicken Products containing >57% Meat (1602 3219)	205,401 tonnes → 332,459 tonnes in 2024 **(+62%)**
Chilled Chicken Cuts (0207 13)	169,380 tonnes → 307,009 tonnes in 2024 **(+81%)** *the bulk of this increase is in boneless cuts (0207 1310)*
Chilled & Frozen Chicken & Turkey Offal incl. Liver (various HS codes)	3,186 tonnes → 17,754 tonnes in 2024 **(+457%)**

Current Difficulties for Importers

Member feedback also notes the following:

European poultrymeat is in short supply and prices are high. Supply chain requirements regarding stocking densities have impacted on production capacity.

Quotas for cooked poultry are insufficient given increased consumer demand.

Supply issues are also exacerbated by restrictions due to avian influenza in Europe and rest of world, along with salmonella issues in Poland who are a large exporter to the UK. Suppliers are competing for a smaller and smaller volume of raw material.

AI has affected supply into the UK as it has limited the number of birds being produced for the UK and restricted supply. This means you have to buy smaller volume from more producers increasing the import costs (due to how import costs disproportionately burden those moving smaller volumes) e.g. £220 port health charge £29 CUC charge on 20mt.

Chinese cooked duck – there are very restricted volumes and underutilised Thai duck quota.

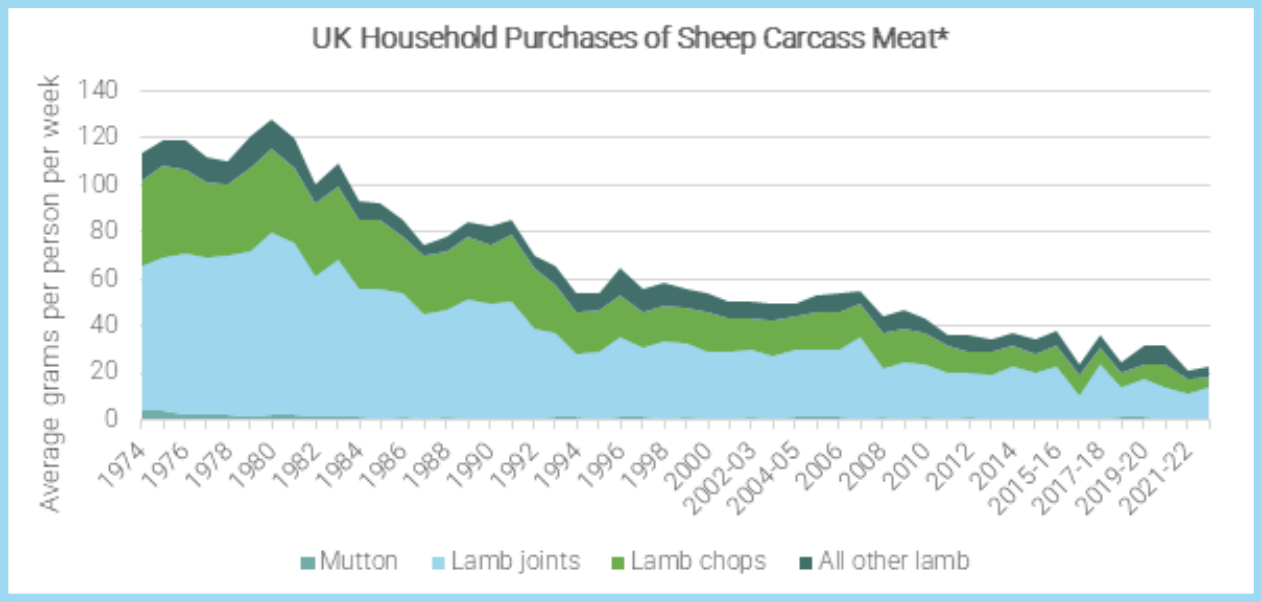
Moving of poultrymeat from rest of world to the EU and UK is difficult without further processing, restricting movement and storage.

Sheep & Goat Meat

Imports of sheepmeat & goatmeat (unprocessed, processed & offal) from all sources in 2024 was 78,110 tonnes. This is down 25% vs the 2013-2015 average (103,882 tonnes), but an increase on 2023 levels, which were just 57,321 tonnes. Part of the reason for this jump in 2024 vs 2023 could be due to lower domestic production, which fell by 7% in 2024 year-on-year. Hybu Cig Cymru (HCC), Wales' meat promotion board, claims the increase in imports *"reflected lower prices from the Southern Hemisphere along with the new Free Trade Agreements, along with a tight domestic supply and record level deadweight prices in the UK."*

AHDB suggest the sharp increase in 2024 imports was due to *"shrinking domestic supply, high UK farmgate prices, and the co-incidence of religious festivals spurring demand."* Halal consumers play an outsized role in demand for sheepmeat – as per AHDB, *"80% consume lamb weekly and 64% consume mutton weekly, compared with only 6% of the general UK population eating lamb."* Member feedback also noted this consumer segment as increasing demand for lamb.

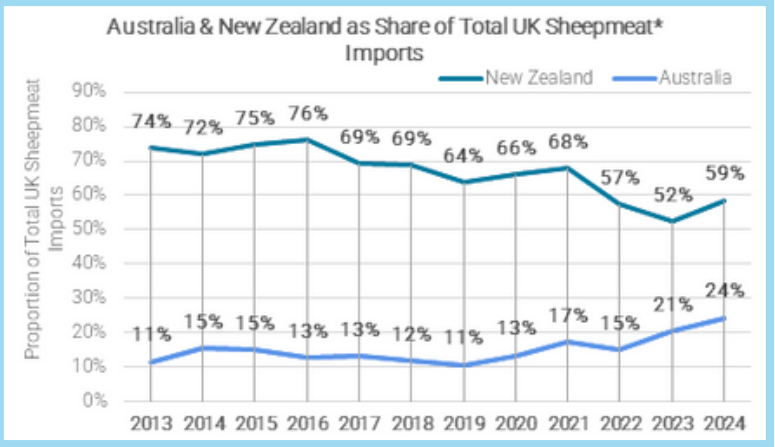
Over the longer term, UK household consumption of sheep carcass meat has steadily declined – see chart below using data from *Defra's Family Food Survey* showing household purchases between 1974 and 2023 – note that this does not include eating out in restaurants etc:



*Carcass meat only - does not include meat products derived from sheep

To the right are the top 10 exporters of sheep & goatmeat (including processed products) to the UK in 2023.

The UK imports most of its sheepmeat from **New Zealand & Australia**, with a significant amount also coming from Ireland. Imports from New Zealand declined steadily from >80,000 tonnes in 2013, to <30,000 tonnes in 2023. However in 2024 imports have increased year-on-year to 45,772 tonnes. Imports from Australia also increased in 2024 – to >19,000 tonnes, which is a 32% increase vs the 2013-15 average, and a 62% increase on 2023 volumes. Australia has in recent years overtaken New Zealand to become the world's largest sheepmeat exporter and it is likely as per the trend in the following chart, that going forwards it will continue to be an increasingly important supplier of UK sheepmeat:

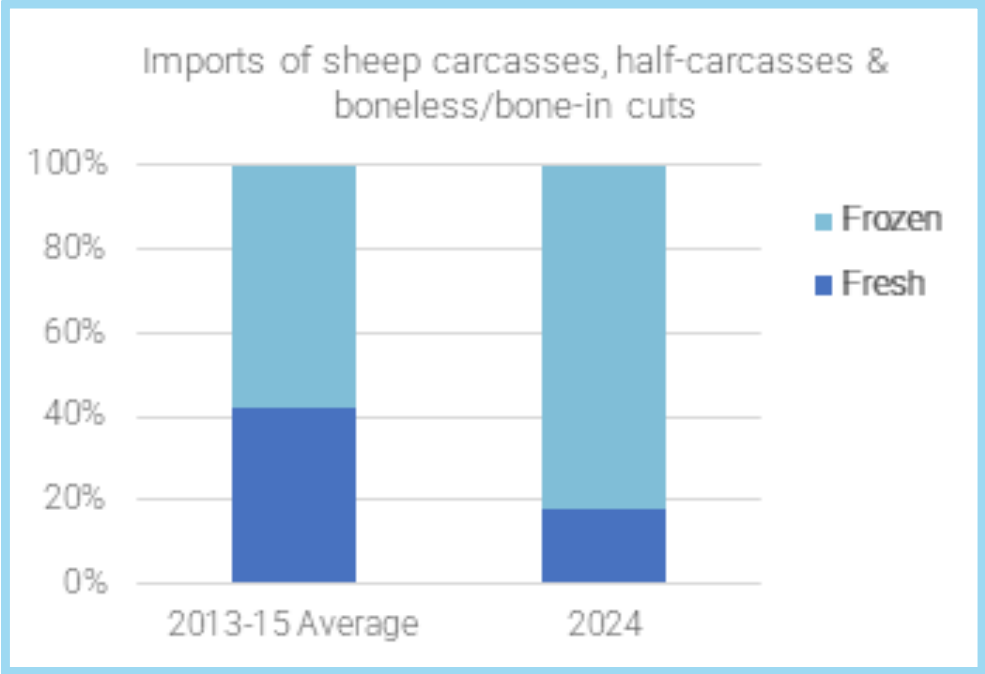


*Includes processed/prepared products & goat meat

Sheep & Goat Meat* Top 10 Sources	**2024 Imports** (Tonnes)
New Zealand	45,772
Australia	19,018
Ireland	8,282
Spain	1,298
Netherlands	948
Iceland	823
Falkland Islands	491
Italy	276
Romania	228
Chile	189

*Including offal and processed products

Notable Product Trends 2013-2024



In terms of changes within the product categories, one recent trend perhaps worth noting, is a **shift away from chilled towards frozen imports of sheep & lamb**. In the 2013-15 average, there was a fairly even split between chilled (42%) and frozen (58%) for carcasses, half-carcasses & boneless/bone-in cuts of sheep & lamb. By 2024, this had dropped to just 18% chilled and 86% frozen. Given the bulk of our sheepmeat imports are shipped from Oceania, it is possible that the recent disruption to Red Sea shipping routes (and associated extra transit times from rerouting around South Africa as mentioned earlier in the paper) may be further contributing to this shift, and this was noted by IMTA members as a factor. Another factor cited by members was the additional flexibility & efficiency for imported frozen product to be stored and then utilised when gaps in domestic supply appear.

Another point of note though from a relatively low base, is an **increase in goatmeat imports** – up by 261% vs the 2013-15 average to 1,650 tonnes for 2024. This is still a relatively small volume, but it bucks the overall trend of sheep & goatmeat imports over the period which has declined substantially. It means goatmeat constitutes 2.1% of total sheep & goatmeat imports in 2024, versus just 0.4% of the total in 2013. This increase may reflect an increasing demand for goatmeat potentially supported by the number of Caribbean and Middle-Eastern restaurants in the UK increasing significantly in recent years.

Current Difficulties for Importers

Member feedback also notes the following:

We need more supply at the moment due to lower local/Irish flocks.

Quota regulations when supplying NI is a limiting factor on supply.

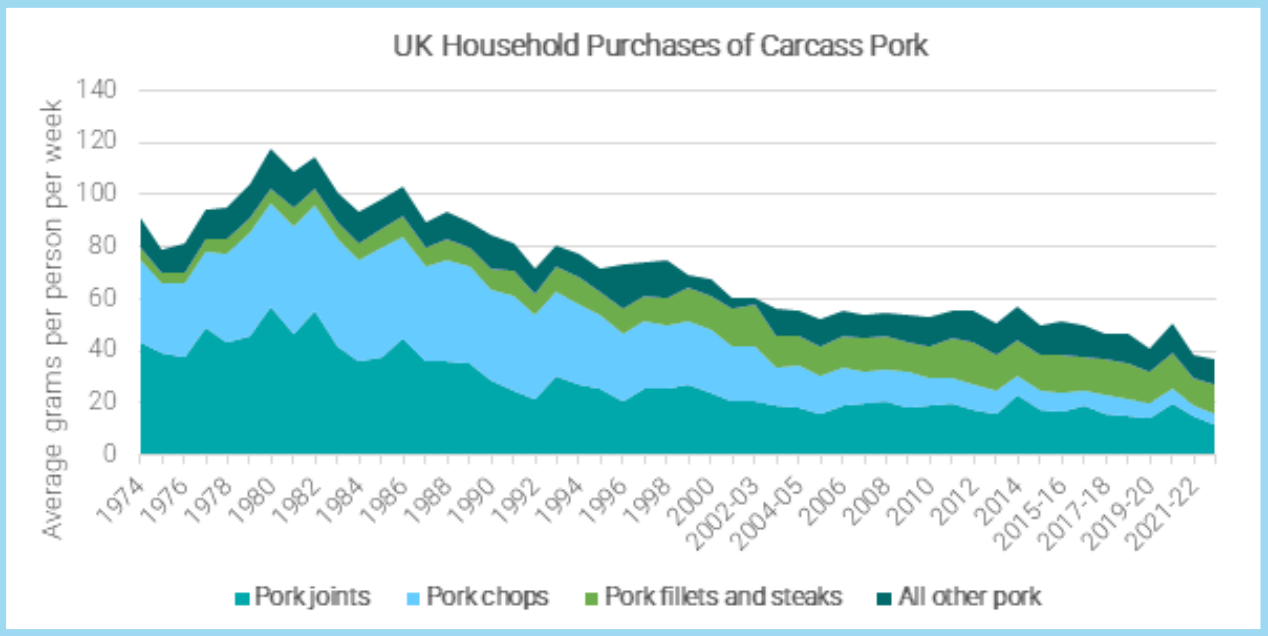
For goatmeat exports from Spain moving to the UK, they require an 'SAE 3 traceability certificate' (from Spanish authorities) - this means that the farmers have to do extra certification and because it is so expensive and involves lots of inspections, as the goats are free range, the farmers don't want to do it meaning they cannot export without it. Because of this situation suppliers from Spain are not exporting goatmeat to the UK until the legislation changes.

Pigmeat & Sausages

Sausages are included in this section, but are treated separately from pigmeat, as there is no defined species in the HMRC CN Codes (*"1601 - Sausages and similar products, of meat, meat offal, blood or insects; food preparations based on these products"*) – it is likely that many of the sausage imports are comprised of pork, but there are likely to also be beef, lamb and poultrymeat sausages.

Imports of pigmeat (incl. processed products) from all sources in 2024 were 633,980 tonnes – a drop of 14% vs the 2013-2015 average (737,702 tonnes). AHDB note that a 4% increase in UK pork production in 2024 may have dampened import volumes in 2024. Imports of sausages from all sources in 2024 were up 37% to 155,295 tonnes vs the 2013-2015 average (107,865 tonnes).

Similarly to sheepmeat, the longer-term trend has been declining household purchases of pork since a peak around 1980 – see chart below using data from Defra's Family Food Survey showing household purchases between 1974 and 2023 (note this does not include eating out in restaurants etc). One notable change is pork chops in particular being steadily displaced by pork fillets and steaks.



*Carcass meat only – does not include meat products derived from pork

With the exception of the US, all of the top 10 sources in 2024 were European countries; with Germany, Denmark & the Netherlands some of the UK's key suppliers (although the volume from the Netherlands is likely to include some cutting of product from other EU origins). The EU's latest Agri-Outlook (pg. 39) suggests that "implementation of stricter laws in certain EU countries and declining export opportunities…are expected to reduce production" with a forecast of 1.2m tonne production decline by 2035 relative to 2022-24 levels.

Please find in the tables below the top 10 exporters of unprocessed pork, processed pork products (e.g. hams, bacon) and the top 10 exporters of sausages in 2024. It is likely that a lot of the sausages are comprised of pork but they are separated because there is no defined species in the HMRC customs classification codes.

Unprocessed Pork Top 10 Sources	**2024 Imports** (Tonnes)	**Processed Pork** Top 10 Sources	**2024 Imports** (Tonnes)	**Sausages** Top 10 Sources	**2024 Imports** (Tonnes)
Germany	73,095	Netherlands	105,960	Germany	26,261
Denmark	64,549	Denmark	58,919	Poland	22,981
France	48,619	Ireland	33,663	Belgium	19,753
Netherlands	44,815	Poland	27,374	Ireland	17,908
Spain	44,091	Germany	10,781	Denmark	17,178
Belgium	42,572	Belgium	8,695	France	14,285
Ireland	29,781	France	8,659	Spain	12,107
Poland	7,850	Italy	8,608	Netherlands	8,360
Hungary	1,680	Spain	5,842	Italy	7,227
United States	1,027	Romania	2,225	Romania	2,712

Although **Denmark** remains an important supplier, imports of all pork (unprocessed & processed) from Denmark have declined from an average of 214,203 tonnes in 2013-15 to 123,467 tonnes in 2024. Conversely over the period, volumes of imports from other partners like **Spain, France & Belgium** have increased – in 2013, these three countries combined accounted for 13% of UK pork (including processed) imports, which increased to 25% by 2024.

Processed pork volumes from **Germany** have declined notably over the period, from an average of 57,974 tonnes in 2013-15 to 10,781 tonnes in 2024 – a drop of 81%.

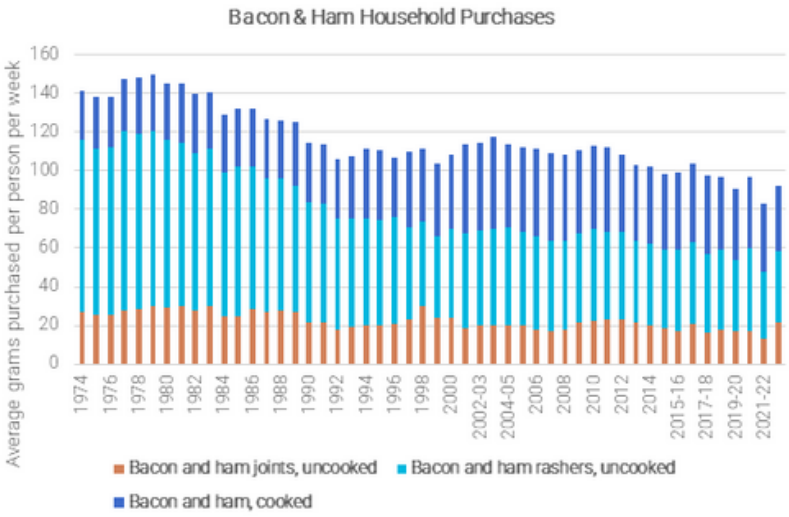
Notable Product Changes 2013-2024

The decline in unprocessed & processed pork import volume over the period was largely driven by a decline in imports of processed products, as import volumes of unprocessed pork remained broadly similar in 2024 (-0.5%) vs the 2013-15 average. For **processed products**, imports of prepared hams (CN Code 1602 41) more than halved to 42,108 tonnes by 2024 compared to the 2013-15 average of 92,900 tonnes. Imports of bone-in hams & shoulders (0210 11 product) also fell from an average of 9,917 tonnes in 2013-15 to just 971 tonnes in 2024 – a 90% drop.

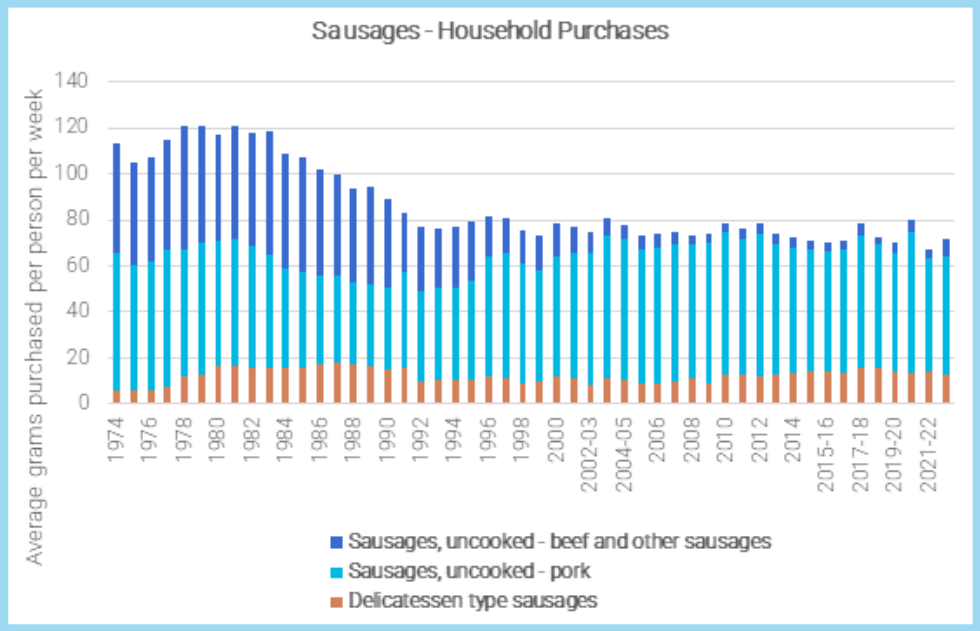
The most dramatic decline was in imports of certain **salted/brined pork preparations** (0210 1950 product). In 2013-15 average imports were 144,076 tonnes, which declined 97% by 2024 to just 4,751 tonnes. This was somewhat counterbalanced by an increase in imports of salted/brined pork loins which increased from 41,688 tonnes to 133,370 tonnes over the same period. Member feedback suggests increased attention on reducing salt in diets may have contributed to this change.

Product Category (HS-6 or HS-8 Code)	**Notable change in 2024 vs 2013-15 Ave**
Prepared/Preserved Hams (1602 41)	92,900 tonnes → 42,108 tonnes in 2024 (-55%)
Salted/Brined Pork (excl. hams, shoulders, bellies, bacon, loin & others) (0210 1950)	144,076 tonnes → 4,751 tonnes in 2024 (-97%)
Salted/Brined Pork Loins (0210 1940)	41,688 tonnes → 133,370 tonnes in 2024 (+220%)
Cooked Sausages & Related Food Preparations (1601 0099)	64,753 tonnes → 103,124 tonnes in 2024 (+59%)

Defra's Family Food dataset on UK household purchases exhibits similar consumption trends among household spending (not including eating out at restaurants etc) over the longer term – see below chart showing a slow decline in overall household spending on bacon & ham between 1974 and 2023. Purchases of cooked bacon & ham increased slightly over the period while uncooked bacon & ham joints and rashers declined quite significantly; perhaps reflecting the shift among consumers towards more 'convenience' ready-cooked products.



The same Defra dataset illustrates the enduring popularity among UK consumers of pork sausages, whereas household purchases of sausages from other meats such as beef has declined significantly since the 1980s:



Current Difficulties for Importers

Member feedback also notes the following:

FMD outbreaks and restrictions on importing frozen fresh pork from Germany, Poland, Hungary caused shortages and price spikes.

When Germany was suspended due to FMD it stopped supply from dependable companies. It wasn't possible to replace the supply chain by moving to another country which would have been very costly and difficult to find the same quality/specification. It will be important to know that given lessons learned from the first outbreak in the EU this year that Defra will know the drill and be swifter if there are any further cases.

There were many specific products which were only sourceable from Germany which are not readily available for the UK market and so there were several members advocating for the need for swift regionalisation.

The UK should consider market access for pork from Brazil to diversify supply options given the current reliance on Europe.

Longer-Term Consumption Habits in the UK

Some of the trends illustrated in the statistics above for beef, poultrymeat, pork & sheepmeat may reflect changing consumption habits among UK consumers.

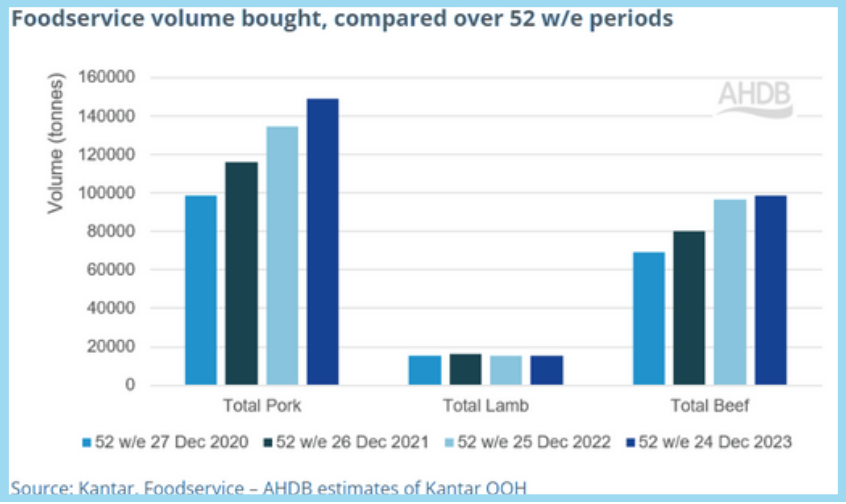
One trend which was evident in both beef and pork import data, is a **shift towards boneless cuts which saw significant volume increases over 2013-2024** supported by a corresponding decline in imports of carcasses & half-carcasses & bone-in cuts. As mentioned, there may be several factors driving this trend. It could partially reflect a shortage of qualified butchers in the UK (as noted by the FSA in 2023), which may be encouraging pre-butchered imports in lieu of carcass or bone-in imports. AHDB (April 2025) similarly suggest that a possible reason for this shift is that *"the UK is increasingly relying on foreign butchery capacity to alleviate workforce shortages"*, and it is possible the 2024 increase in the salary threshold for the skilled worker visa is worsening the situation, as noted by BMPA. The shift to boneless cuts could also reflect the increasing popularity of ready-meals & convenience food.

Member feedback also noted the shortage of butchers as a potential reason for the shift towards boneless cuts, as well as consumer convenience & increasing popularity of ready-meals and convenience food. Another reason members cited is the increased cost of shipping – which means it is more economically efficient to ship higher value products such as pre-butchered boneless cuts, as well as preference for exporters to pack value-added product instead of product which needs to be further processed.

Cost-of-Living & the Covid Pandemic

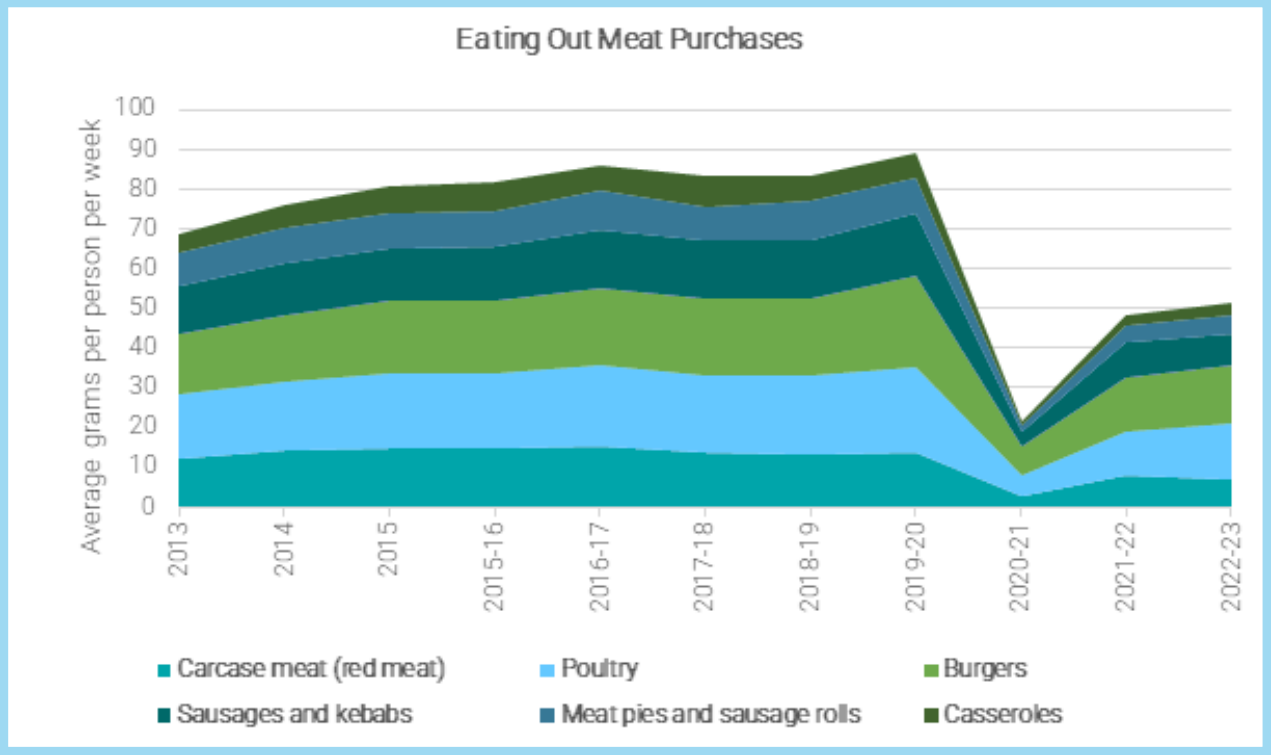
Another trend worth noting is a cultural shift, as per capita red meat consumption has been trending downwards over the longer term, and red meat may increasingly be viewed as a 'treat' rather than an everyday occurrence, particularly with consumers facing a cost-of-living crisis and red meat generally being more costly per Kg than poultry.

Recent insights from AHDB bear this out – retail purchases of red meat declined between 2020-2023 , while foodservice consumption has increased over the same period (although as of 2023 data had still not recovered to pre-Covid levels) – see AHDB chart:



AHDB also found evidence that due to price pressures, consumers have switched away from red meat and towards poultrymeat – which is *"considered by consumers as the most versatile meat along with appealing to those who are price sensitive"*. There is already a longer-term shift on a per capita basis where consumers have been switching from red meat to poultrymeat.

Defra's Family Food Dataset also illustrates a steady increase in out-of-home meat consumption between 2013 and 2020, before the Covid pandemic removed this option for many – see chart below with data until April 2023:



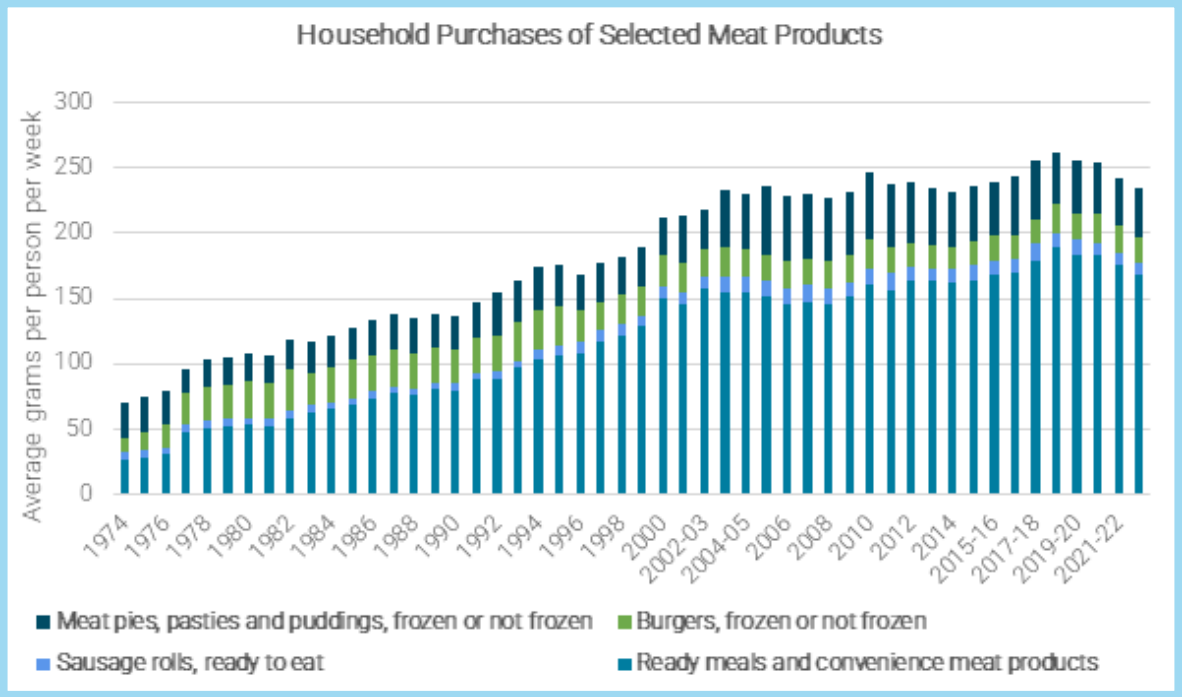
AHDB (March 2024) note that despite price pressures, *"shoppers are looking for those out-of-home meal occasions, but to achieve this within their budget are trading down channel to achieve this. However, more expensive meal occasions are still being indulged in, just at a lower frequency."*

AHDB (May 2025) data further suggests full-service restaurants are "continuing to appeal to consumers who are seeking indulgent or treat-led occasions"– with both consumer spend (+10.1%) & volume increases (+3.4%) in 2024 compared to 2023 – despite restaurant prices increasing by 7.5% year-on-year. As per a 2020 RAND report on food trends in the UK, "*meat consumption was found to be more likely in a restaurant than when eating at home*".

Convenience Food

Another element of this cultural shift in meat consumption is towards convenience food like ready meals and away from primary cuts of meat. As per AHDB (August 2024), The UK 'Food-to-go' sector is one of the fastest growing, and red meat plays an important part in these sandwiches, ready meals, savoury pastries etc. It is therefore also possible that boneless imports of beef and pork are increasingly demanded in the food manufacturing sector in order to meet this increased demand. This is also likely to be part of the reason for the growth in volume and value of sausage imports, as pork "*accounted for almost three-quarters of (red meat usage in food-to-go) growth*".

These trends towards retail purchases of fewer carcass meat products and more convenience 'food to go' may continue going forwards, impacting the type of meat - and therefore the profile of imports - demanded by UK consumers and the food manufacturing sector. As per Defra's Family Food datasets, while household carcass meat purchases for pork, beef & lamb have steadily declined over time, household purchases of various convenience meat products such as ready meals containing meat, meal kits, meat pasties have increased markedly over the longer-term – see chart using Defra data below highlighting some select products up to 2023 (note this does not include eating out in restaurants etc):



AHDB (March 2025) similarly highlight that time spent preparing meals at home has also been on the decline since 2020, and the *"desire for convenience has caused meals to become simpler, with fewer ingredients being used across all lunch and evening meal occasions – both now having less than five ingredients on average."*

In addition, the cost-of-living crisis has led to an increase in 'fakeaways' – where consumers recreate the eating out experience at home. This has encouraged retailers to introduce more premium ready meal ranges, of which imported meat plays an important role in the food manufacturing.

Trying New Things

Recent consumer surveys also suggest UK consumers are increasingly open to trying new types of cuisine and foods from different origins. An HRA Global study (November 2024) found "*82% of respondents agreed that they would like to see a wider selection of international products in stores*."

Streetfood markets have increased in popularity in recent years, providing more choice from a diverse range of cusines and a 2023 Mintel report predicted *"the value of the UK ethnic foodservice market to grow by 20% over the next five years"*. In the last twenty years, there has also been a proliferation of restaurants specialising in specific cuisines or origins where imported meat plays an important role for consumers seeking new food experiences – for example American smokehouses, dedicated steakhouses (e.g. Gaucho for Argentinian beef), Brazilian rodizios, which meet increasing consumer appetites for 'experiential dining'.

Conclusion

Our paper provides evidence of the current situation with regard to imports, which in complement to domestic production, play a crucial role in UK food security. In light of the government's consideration of food security as one of the key pillars in the food strategy we would suggest that the following points are considered:

01 There needs to be better acknowledgement that just because there are quotas agreed that this doesn't automatically mean they are used. For example with CPTPP there are quota volumes but very limited veterinary market access in place. Whether further market access is required from a veterinary standpoint to support UK food security should be considered. (Obviously only where UK biosecurity requirements are met)

02 That the UK is very reliant on the EU for much (c. 80%) of its meat import volumes – but that longer term EU production needs to be monitored and ensuring we maintain a variety of non-EU sources is vital. In light of FMD outbreaks in Europe and the short supply of certain products thereafter there is perhaps a need to consider whether the UK needs further options to provide better food security.

03 That longer-term consumption habits among UK consumers may be changing the types of cuts being imported.

04 In terms of food security, the UK needs to consider whether our domestic production is sufficiently robust and our import access is sufficient to support UK food security. With reports of declining levels of domestic production, this needs to be considered alongside import access as part of any food strategy. Exports are also a key part of the picture for ensuring sustainable carcass utilisation. We need all three to be robust to ensure consumer choice and food security as well as carcass balance.

Reliance on EU

Close consideration needs to be paid to EU production trends for the future. This includes the impacts of any EU policies which may affect EU production, and therefore exports to the UK. The UK therefore needs to ensure it continues to have access to meat supply from both EU and Non-EU sources in order to protect food security. There is evidence of an increasing share of meat (particularly poultrymeat) in recent years coming from non-EU sources, although it is difficult to say whether this is a trend which will continue.

The EU's outlook for production & exports forecasts a decline for all meats except poultrymeat. We are already seeing a dramatic increase in prices in the EU & UK from the current shortage of supply.

Longer-term consumption habits in UK

UK consumption habits also dictate the type of meat cuts and products demanded by consumers and imported to the UK. There are many factors which affect consumption habits including cost-of-living pressures, cultural shifts in our relationship with mealtimes, the perception of certain meats etc. While per capita consumption may have declined for some meat types, the rapidly burgeoning overall population & UK consumer preference for certain cuts means total meat imports have increased in the last decade and will continue to be vital for UK food security going forwards. Imports complement domestic production by filling certain distribution channels that have specific requirements which UK production is unable to meet, and smoothing out domestic supply gaps which provides an antidote to price volatility, all the while maintaining a wide range of choice for consumers.

Annex I - Data Categorisation Methodology

All data for import volumes and values are from HMRC's Trade Database. In order to refer to 'unprocessed beef' or 'processed pork' for example, IMTA have categorised the individual CN codes as below:

Category	Subcategory	CN Codes Included
Beef	Unprocessed*	0201 0202 0206 (10/21/22/29)
	Preparations & Processed Products	0210 20 0210 99 (51/55) 1602 50 1602 90 (61/99)
Pork	Unprocessed*	0203 0206 (30/41/49)
	Preparations & Processed Products	0210 (11/12/19) 0210 99 (41/49) 1602 (41/42/49) 1602 90 51
Poultry	Unprocessed*	0207
	Preparations & Processed Products	0210 99 (39/71/79) 1602 20 10 1602 (31/32/39)
Sheepmeat**	Unprocessed*	0204 0206 8099 0206 9099
	Preparations & Processed Products	0210 99 (21/29) 1602 90 (91/95)
Sausages - Unknown Species	Processed & Similar Products	1601 00 (10/91/99)

* Unprocessed category includes offal (0206 codes)

** Sheepmeat also includes goatmeat

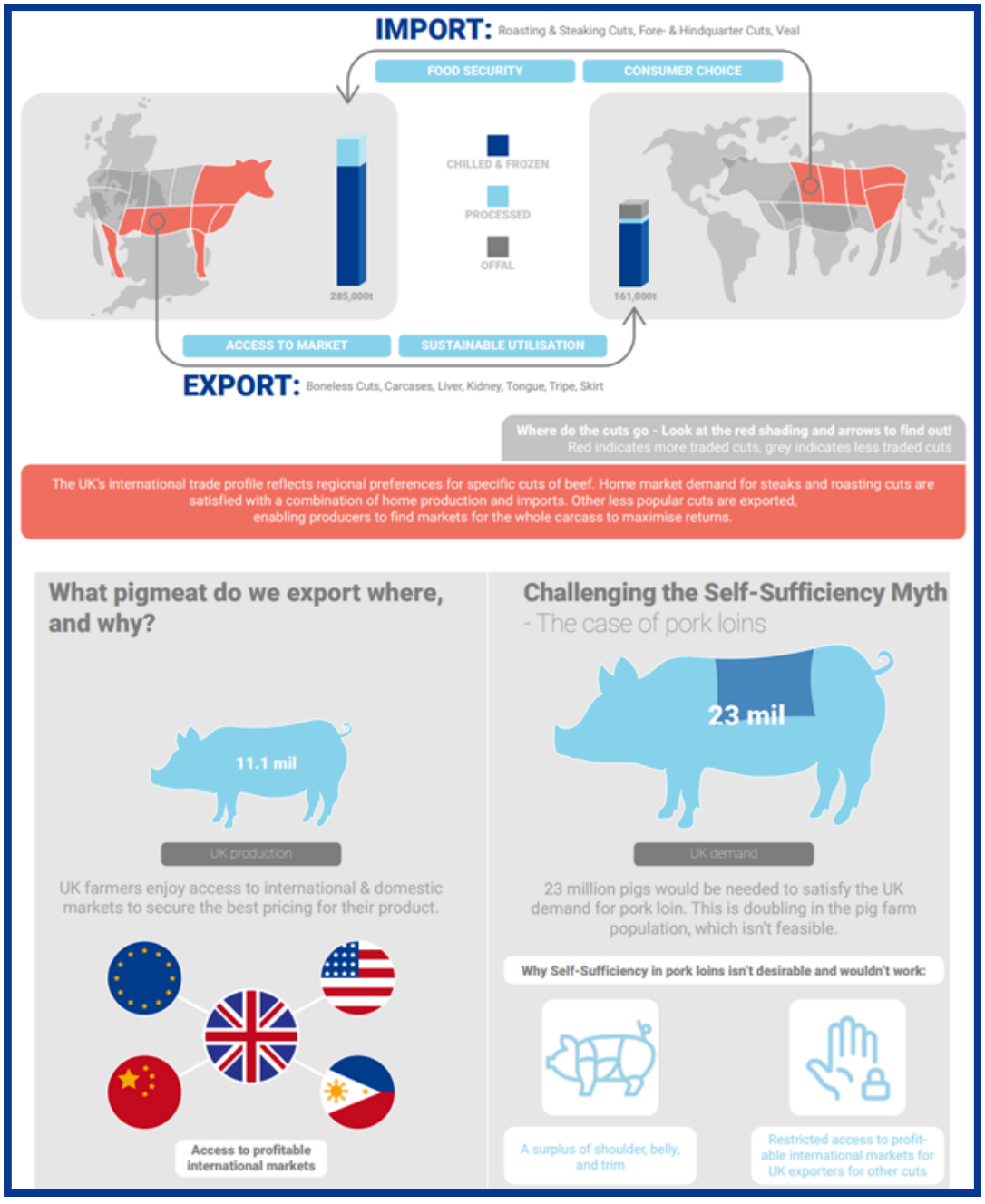
Please note that the following CN codes have been excluded from the data:

Exclusions of Note

CN Code	Description	Reason for Exclusion from Data
0210 (91/92/93/9931)	Meat from species other than bovine, ovine, caprine, porcine or poultry (e.g primate, reptiles, mules)	Volumes of these are low and the focus is on what our members import - pork, beef, sheep (& goat), poultrymeat
0210 99 (85/90)	Meat where species is not specified (e.g. edible flours & meals)	Species is not defined so difficult to categorise - volumes of these are also low
1602 20 90	Liver preparations (not of goose or duck)	

Annex II - Carcass Balance

Please see below infographics illustrating the concept of carcass balance (source: IMTA)



Annex III - Considerations & Context for HMRC Data Reliability

There should be some cautionary notes regarding interpreting the trade statistics: the global context outlined on pages 1-3 of this paper, and particularly Brexit, means the import statistics methodology is not consistent over the 2013-2024 period. Currently HMRC's trade database relies on customs declarations – in 2016, the methodology for Non-EU imports was changed due to legislation affecting how goods are declared to customs. Additionally, for imports from the EU, according to HMRC "*you may find differences between data published before and after January 2022*." It is possible that there was some 'stockpiling' trading behaviour prior to Brexit, at multiple false deadlines, in anticipation of potential future obstacles, and the Covid pandemic also had a significant impact on trade flows, as well as lockdowns resulting in closures to foodservice & events etc, so 2020 (and especially 2021) figures should be interpreted with this in mind.

Additionally, the 'Rotterdam Effect' should be considered – because Rotterdam is a major hub for arrivals from RoW, it is possible that some imports to GB from RoW, which are re-exported from or arrive via the Netherlands are counted as an import from the EU. Owing to the way import data was collected when we were a Member State, The Rotterdam effect' was impossible to distil to get an accurate view of the total imports that ended up in the UK market. Intrastat reporting had significant limitations on reporting thresholds and demonstrating the real origin of a movement from The Netherlands or other Member States which had originally come from a non-EU supplier. Nonetheless, these HMRC figures remain the most accurate & accessible publicly available statistics.