

The Self-Sufficiency Myth

SELF-SUFFICIENCY EXPLAINED

- Some might argue that producer incomes would be boosted if the UK were more self-sufficient in food.
- The meat sector is unique in that it disassembles its product (from carcasses into cuts of meat) and UK consumer demand is not in direct proportion to the cuts from the carcass.
- Satisfying UK consumer demand for popular cuts like chicken breasts would also produce surplus product with no real market in the UK, such as chicken feet.
- This surplus would have to be exported or disposed of at a cost to the producer. Eblex put the figure for disposal costs of offal at £85 per tonne in 2006 for those doing 10-50 tonnes per week.
- Some third countries highly value such products, however market access work is required to open new markets.
- If there is a large surplus of product with no available market this will bring down returns to producers.

Beef— Self-Sufficiency, Imports and Exports

Overview of Imports and Exports

The UK imported around 233,000 tonnes of chilled and frozen beef in 2022, 223,000 from the EU and 10,000 from outside the EU. The UK imported a further 52,000 tonnes of processed beef in 2022 from both EU and non-EU countries.

The UK exported around 125,000 tonnes of chilled and frozen beef in 2022, of which 106,000 to EU countries and 18,000 to non-EU countries. The UK exported a further 29,000 tonnes of beef offal, including 16,000 to the EU and 13,000 outside the EU. The 8,000 tonnes of processed beef exported went mainly to the EU.

What Are We Importing?	What Are We Exporting?
Roasting cuts	Boneless cuts, carcasses, bone-in hindquarters
Steaking cuts	Boneless hindquarter and forequarter cuts
Forequarter cuts	Liver
Hindquarter cuts	Kidney, tongue, tripe
Veal	Thick and thin skirt

Table 1

Is Self-sufficiency Possible?

Based on average chilled and frozen beef imports from 2020-2022 of 236,000 tonnes, with members' knowledge of the types of cut imported into the UK, IMTA has been able to estimate that to replace these supplies with British product would require UK supplies of cattle for slaughter to almost double. This would also result in an additional 275,000 tonnes of cuts in greater surplus to be absorbed by the domestic market or found an export market. This is shown in the diagram below.



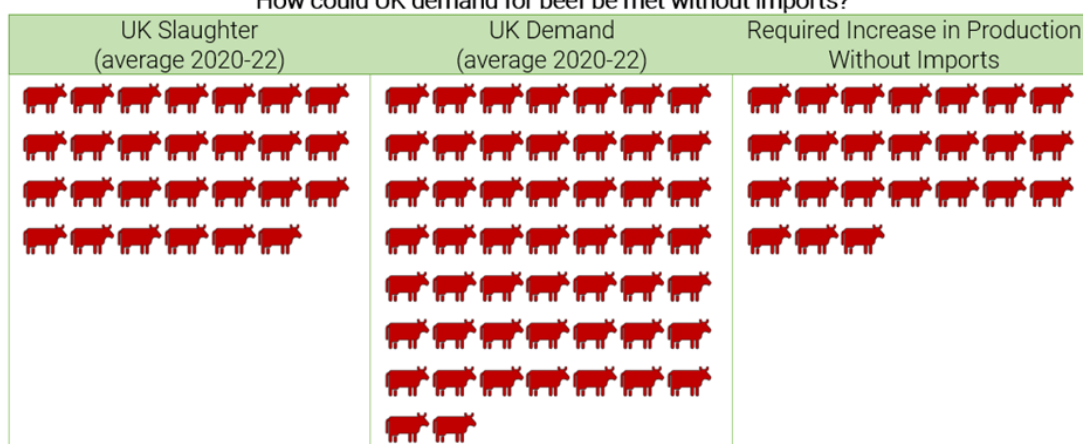
REALITY CHECK — CARCASS BALANCE

So the UK is deficient in beef, why not stop the export and consume that product in the UK instead of importing beef?

At first glance this may seem a good idea BUT, as Table 1 demonstrates, the products being imported and exported are in general fundamentally different. You might argue that high value steaks are being exported to France while we import equally high value steaks from Ireland or Brazil. But this like for like export and import makes up a very small part of a much larger picture. In general the products being exported, such as pigs' trotters, are being exported because there is no market for them in the UK or because another market values them more highly and is therefore willing to pay a higher price, a bonus for producers.

Also key to understanding the dynamic behind both importing and exporting the same cuts is consumer choice. Certain consumers may want to try a USDA grainfed steak, just because there is perfectly good British steak available is no reason to limit menus.

How could UK demand for beef be met without imports?



 = 100,000 animals

Sheepmeat – Self-Sufficiency, Imports and Exports

Overview of Imports and Exports

The UK imported around **55,000** tonnes of chilled and frozen sheepmeat in 2022. **12,000** from the EU and **43,000** from outside the EU, of which **32,000** from New Zealand and **9,500** from Australia.

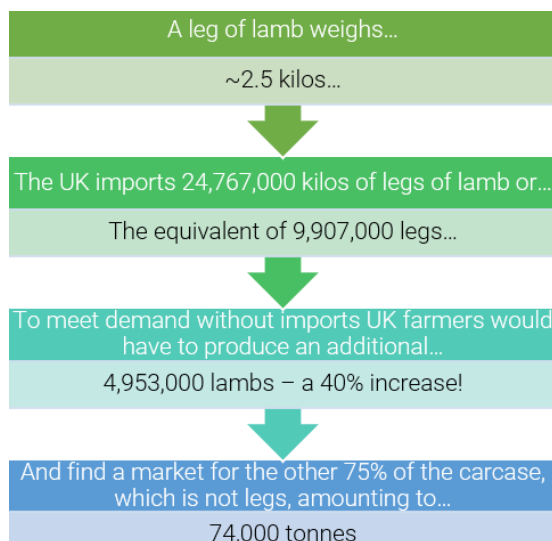
The UK exported around **75,000** tonnes of sheepmeat in 2022 of which **70,000** to EU countries and **5,000** to non-EU countries. There is also a limited amount of sheep offal exported—about **3,000** tonnes going largely to the EU.

What Are We Importing?	What Are We Exporting?
Boneless lamb	Carcases
Legs	Short forequarters
Shoulders	Lamb rack
Middles	Bones
Mutton	
Trimnings, manufacturing cuts,	

Is Self-sufficiency Possible?

The UK market is predominantly a lamb leg market both for retail and food service which makes imports a necessity. For the UK to be self-sufficient in legs without any imports and without stopping exports, of for instance carcasses with legs on, would require a 40% increase in lamb slaughterings. The diagram below demonstrates this.

This is not a feasible or desirable outcome and would not solve the seasonality of production issue.



REALITY CHECK – SEASONALITY

The UK is producing plenty of lamb, why import it? This question might seem reasonable, however it misses the key points of seasonality, carcass balance and consumer choice.

Take seasonality: the seasonality of production in the UK versus the Southern Hemisphere (including traditional suppliers New Zealand and Australia), complements each other and thus enables the consumer to eat the best quality lamb throughout the year. Imports also meet retailers' requirements for delivering large volumes of consistent product over a short time frame such as Easter when UK production is seasonally low. Without them shelves would soon start looking empty and consumers would get out of the habit of eating lamb.

Pigmeat – Self-Sufficiency, Imports and Exports

Overview of Imports and Exports

The UK imported around **320,000** tonnes of pork in 2022, including only about **900** tonnes from outside the EU, virtually all from the US. The UK also imported almost **465,000** tonnes of processed pigmeat, including bacon, in 2022, largely from Netherlands, Denmark and Ireland.

The UK exported around **190,000** tonnes of chilled and frozen pigmeat in 2022, of which **90,000** to EU countries and around **100,000** to non-EU countries. It also exported **146,000** tonnes of pig offal, largely outside the EU. A further **38,000** tonnes of bacon and processed pork including sausages was exported, overwhelmingly to the EU.

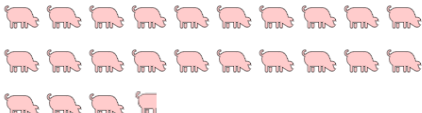
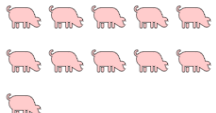
What Are We Importing?	What Are We Exporting?
Boneless loins and hams	Sow carcasses
Collars	Boneless cuts
Legs	Misc. bone-in cuts
Carcases	Bones
Bacon	Belly skins, cheeks, heads, stomachs, ears, snouts, tails, feet

Is Self-sufficiency Possible?

In 2011 BPEX estimated in its BPEX Imports Report that the UK would need 23 million pigs to satisfy the demand for pork loins.

This compares with an average 11.1 million pigs slaughtered in the UK in 2020-22. This is depicted in the table to the side. Similar to the other meats, this would result in an increase in cuts where there is already an oversupply, notably belly, shoulder and trim.

How could UK demand for pork loins be met without imports?

Number of pigs required to meet UK demand for pork loins	Number of pigs slaughtered in the UK (average 2020-22)
	
 = 1,000,000 animals	Source: BPEX and HMRC



REALITY CHECK – PRICE

Price is important. Sometimes a UK product may perfectly meet the requirements of the UK market but it still makes sense to sell it elsewhere. In pigmeat, the UK is importing and exporting some of the same or similar cuts, but supplying the domestic market isn't always the best option for domestic producers. An example of this is sow carcasses which get a better price in markets such as Germany than in the UK.

Then of course there are the products which it would be difficult to find a market for in the UK at all, for instance there is a strong market for pork bones to Hong Kong and China so again producers require access to overseas markets to fetch the overall best price for their animal.

Poultrymeat – Self-Sufficiency, Imports and Exports

"Food security exists when all people, at all times, have physical, social and economic access to sufficient, safe and nutritious food which meets their dietary needs and food preferences for an active and healthy life. - FAO

Self-sufficiency is not synonymous with food security as it fails to protect a country against disruptions to national from animal disease etc. International trade has an important role to play in spreading and sharing risk and volatility. The key to food security is flexibility of supply.

Overview of Imports and Exports

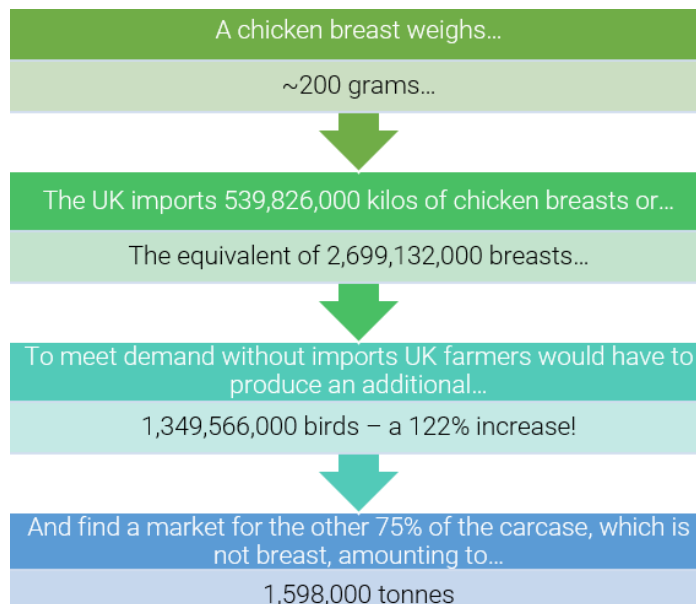
The UK imported around 500,000 tonnes of chilled and frozen poultrymeat in 2022. Around 480,000 from the EU and 20,000 from outside the EU. The UK also imported 45,000 tonnes of salted poultrymeat in 2022, the vast majority from outside the EU, mainly Brazil and Thailand. A further 420,000 tonnes of processed poultry products were imported in 2022, roughly half from the EU and half from outside the EU, mainly from Thailand and Brazil.

The UK exported around 253,000 tonnes of chilled and frozen poultrymeat and offal in 2022 to destinations both inside and outside the EU. It exported a further 26,000 tonnes of processed poultrymeat, the vast majority going to the EU.

What Are We Importing?	What Are We Exporting?
Raw chicken breast	Whole chicken, halves,
Whole chicken	Legs
Salted chicken breast	Backs
Cooked chicken breast	Necks
Cooked products and chicken	Wingtips
Coated chicken breasts / Gou-	Offal
Flavoured chicken	Mechanically recovered
	Feet

Is Self-sufficiency Possible?

The UK is overwhelmingly a breast market and thus the vast majority of poultrymeat imported into the UK, be it raw, salted or cooked, is either whole chicken breast or made of chicken breast. The principal EU suppliers of chilled and frozen poultrymeat are the Netherlands, Poland, Belgium and Ireland. 59 per cent of imports from the EU are boneless chicken meat supplied into the manufacturing, retail and food service sectors. The diagram below demonstrates the unfeasibility of the UK attempting to become self-sufficient in chicken breasts.



REALITY CHECK—LAND AVAILABILITY

It isn't feasible to become self-sufficient in poultrymeat unless consumers are encouraged to give up their preference for breast—an infringement on consumer choice - or production is to double. One can imagine that the land, labour, water, feed, investment and planning permission which would be required to double production would be nearly impossible to obtain. Even if the UK did become self-sufficient in breasts, producers would be left with well over a million tonnes of non-breast to find a market for. The UK is currently locked out of South Africa, its best market for dark meat, and new markets require a huge amount of work to access, particularly with the ever-present threat of another Avian Influenza outbreak and non-acceptance of regionalisation.

Sources:

The sources of the information presented in this report, include but are not limited to:

HMRC Overseas Trade Data

AHDB

FAO



[The International Meat Trade Association](https://www.imta-uk.org/)

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