



# United Kingdom

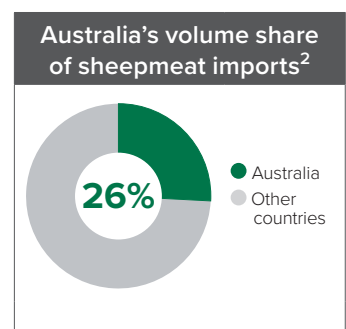
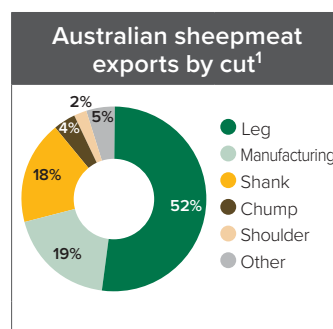
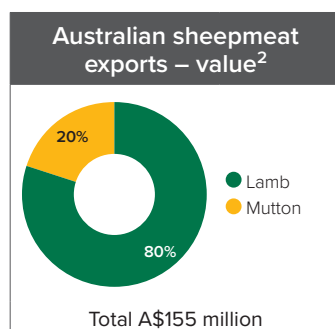
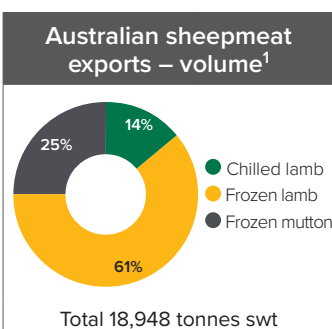
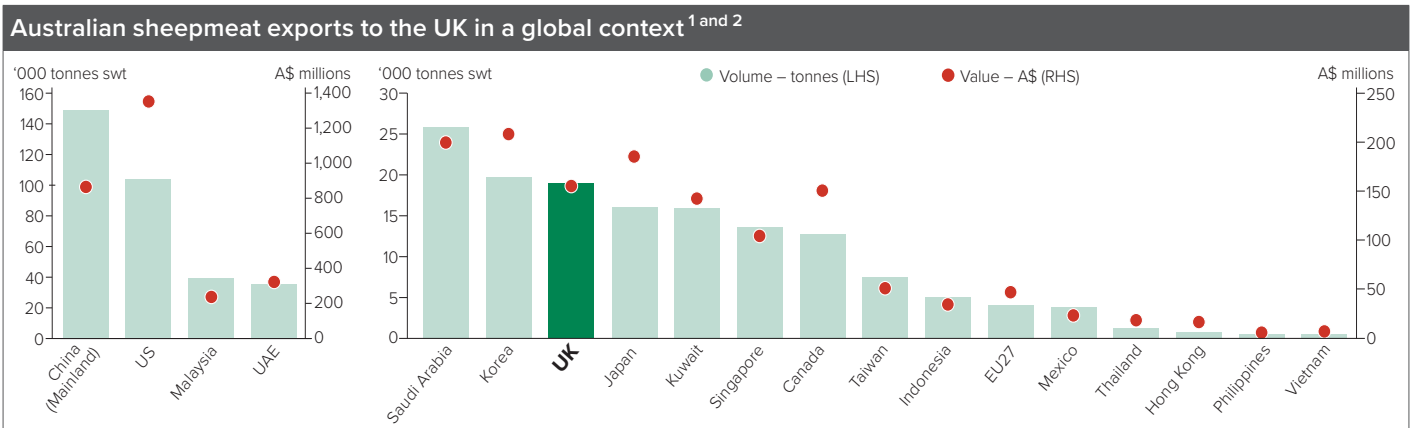
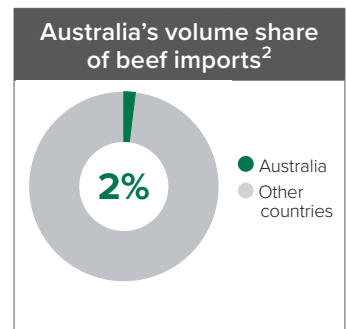
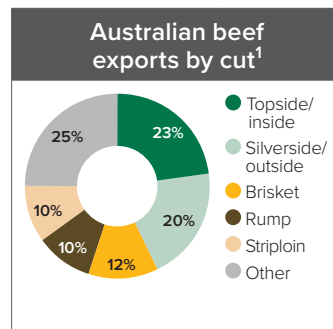
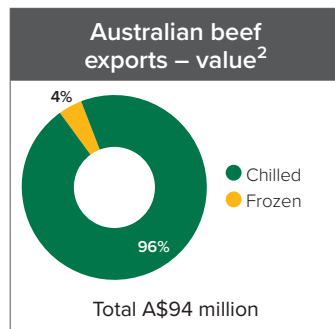
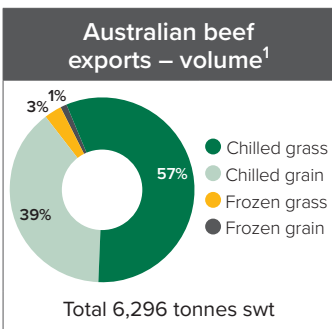
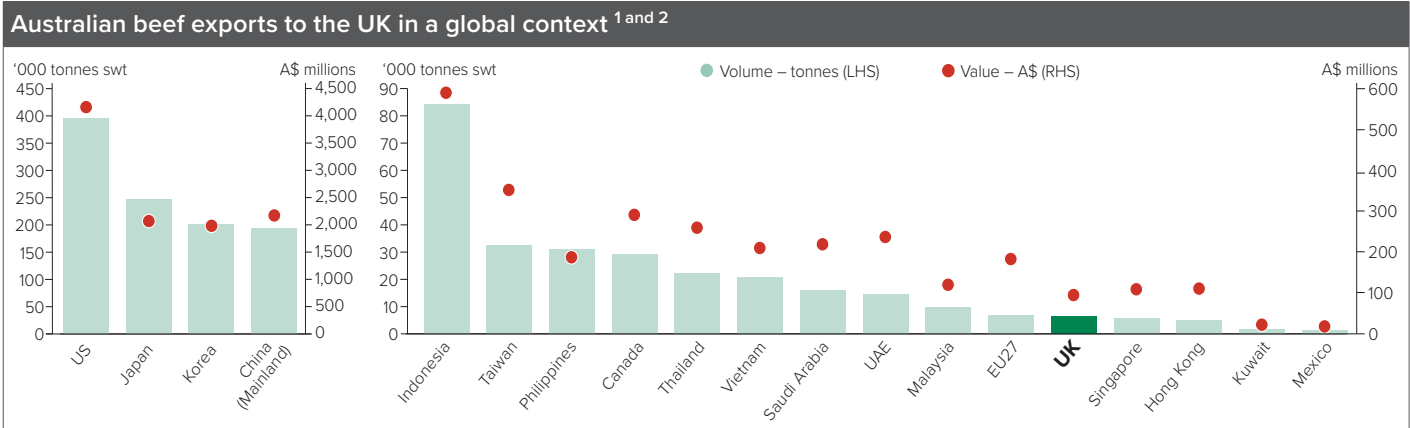


## MARKET SNAPSHOT | BEEF & SHEEPMEAT

**EXPORTS**  
Continued growth building on A-UK FTA

**CONSUMERS**  
Affluent consumers who love red meat, affinity with Australia

**GROWTH**  
Demand for safe, high quality and tender red meat



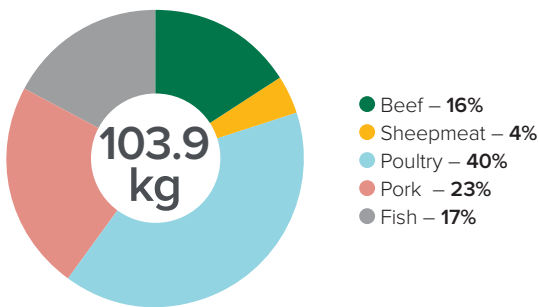
Data source for charts: <sup>1</sup>DAFF (CY2024), <sup>2</sup>Trade Data Monitor (TDM) (MAT November 2024)

## CONSUMERS



- UK beef consumption of 16.3kg per capita is higher than the EU average (of 13.6kg) although it has been on a very gradual decline over the past two decades due to growing concerns relating to health, the environment, animal welfare and cost (Source: GIRA, 2025f).
- Britons have a long history of enjoying beef, which is still the second most frequently consumed protein after chicken. It is perceived as a superior, great tasting, family favourite as well as a versatile meat. This enables it to command a premium price compared to many other proteins.

### Meat consumption per capita



Source: GIRA, kg per carcass weight equivalent (cwe) per head per year, 2024f

- Many traditional beef dishes are based on slow cooking or mince, with domestic product generally on the lean side. Britons have relatively low awareness of some premium beef products

- only 18% have heard of high marble score beef, compared to 33% of Chinese urban consumers, for example (Source: MLA Global Consumer Tracker UK 2022).
- By total sales value, beef is the second largest protein segment and among the fastest growing, with a projected compound annual growth rate (CAGR) of 2.4% in 2024–2028 to reach GB£5.2 billion by 2028 (Source: Fitch Solutions).
- Britons generally reserve highest trust for local and Irish beef following several decades of a 'buy British beef' campaign, particularly in retail. However, despite limited market access since 1973, Australian beef is among the most trusted of import suppliers. Among those aware of it, Australian beef is perceived to be safe, consistently high quality and tender – 49% say it will either be their first choice or they will seriously consider buying it when they next have the opportunity (Source: MLA Global Consumer Tracker UK 2022).

### UK consumers' associations with Australian beef



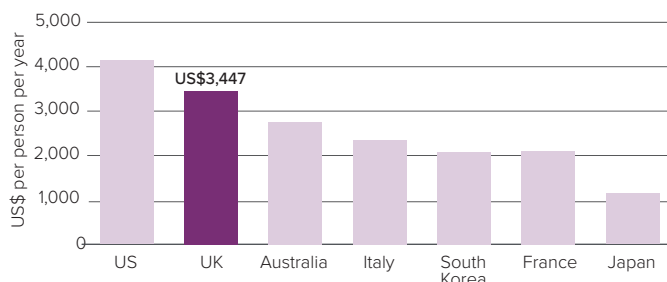
Source: MLA Global Consumer Tracker UK 2022, % agree score

## FOODSERVICE



- British diners' per capita restaurant and hotel spending is high by European standards and although 41% of UK consumers plan to eat out less in the coming months (Source: GlobalData Global Consumer Survey Q2 2024), going out to eat is a thriving part of social life in the UK and is expected to make a comeback from 2025 onwards, but still below prepandemic levels (Source: IGD).
- Foodservice volumes are rebounding in segments like casual dining, fast food and quick-service restaurants as inflation stabilises and office workers return. However, full-service restaurants are recovering more slowly, with independent establishments leading in number of site closures (Source: IGD).

### Restaurants and hotels spending per capita



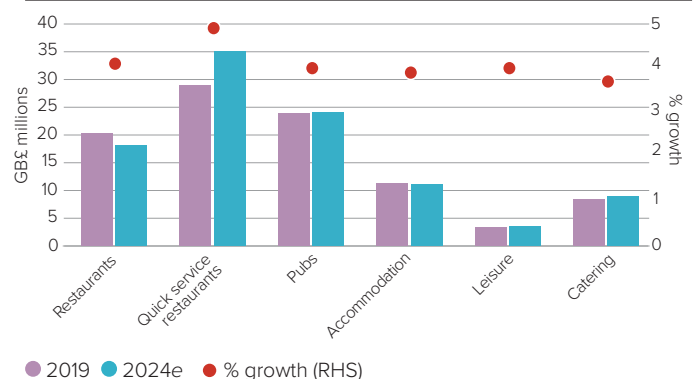
Source: Fitch Solutions, 2025f, Based on annual household spending, Data last reviewed October 2024

- The UK's large pub sector benefited from sporting events in 2024, such as the Euros and Olympics where beef is popular in British and Irish cuisine dishes. Emerging cuisines that may support beef consumption include Chinese, Thai, American BBQ,

Japanese, Turkish, Greek and Mexican (Source: GlobalData Global Consumer Survey Q1 2024, MLA intelligence).

- The market has a large hospitality foodservice segment where beef is enjoyed by tourist visitors. Visitor numbers are forecast to surpass pre-pandemic levels, growing at a CAGR of 4% 2024–2028.

### UK eating out segment size and growth



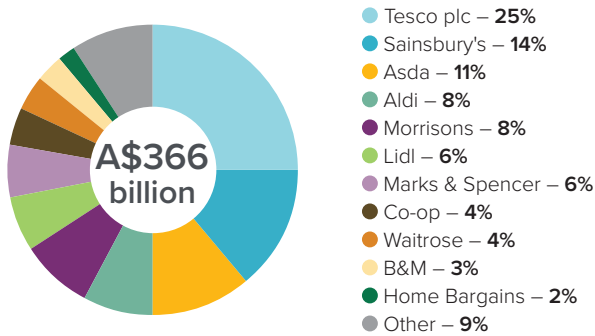
Source: IGD, % growth = CAGR between 2024 to 2029

- MLA estimates that most Australian beef exported to the UK in recent decades has been utilised in the foodservice sector, where it has an established place in high-end restaurants. With the bulk of this product being grainfed or chilled grassfed, the UK is among Australia's highest value export markets with a five year average export unit price to the UK, which is 57% higher than Australia's global export average (Source: Trade Data Monitor (TDM) 2019–20 to 2023–24).



- Many UK shoppers purchase beef for home consumption from supermarkets, 38% do so at least weekly, with 31% also buying beef from butchers at least monthly. The UK has a relatively small but advanced and growing online retail sector by developed market standards, with around 13% of consumers having bought beef online at least fortnightly (Source: *MLA Global Consumer Tracker UK 2022*).

## UK top grocery retailers by sales value



Source: IGD, Sales value A\$ 2025f, Percentage based on total grocery sales value

- Convenience continues to be a major driver of growth in the UK meat sector after the pandemic increased food-to-go solutions (e.g. meal kits, pre-prepared meals, processed meat) (Source: IGD). Although, consumers are managing their household budgets against cost pressures, a third (30%) would pay more

for prepared meals to ensure the quality of the product (Source: *GlobalData Consumer Survey Q2 2024*), highlighting the importance of understanding what 'value' means to shoppers.

- Consumer confidence has continued to rise throughout 2024 driven by wage growth outstripping inflation and inflationary pressures on household budgets easing. UK spending on discretionary items, including food, is expected to continue to grow moderately in coming years (Source: *Fitch Solutions*).
- 45% of younger consumers aged under 35 say they are often or always influenced in their purchase choices by how ethical, environmentally and socially responsible a product is (Source: *GlobalData Consumer Survey Q2 2024*). Hence, claims relating to sustainability and ethics are becoming more visible in UK meat retailing.



American style BBQ has grown in popularity in the UK driven by foodservice and is emerging in retail stores

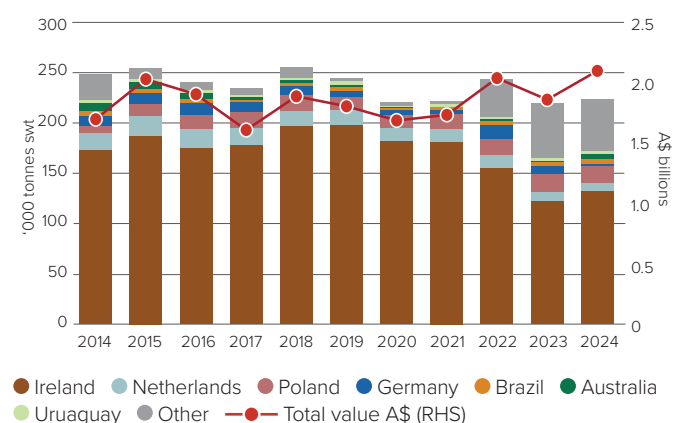
## COMPETITIVE LANDSCAPE



- An estimated 80% of beef consumed in the UK in 2024 was domestically produced. The current outlook is for UK beef production to decline at a CAGR of -1.1% from 2023 to 2028 due to reduced government support payments to producers and low profitability reducing the breeding herd. Total beef consumption is expected to remain steady over the next few years but with falling production, the UK is forecast to increase imports at a CAGR of +0.9% over the same period and import around 354,000 tonnes cwe of beef in 2025 (Source: *GIRA*).
- UK beef import demand, historically hindered by inflation and declining yearly, saw a slight increase of 3% CAGR in 2023–2024 (Source: *Trade Data Monitor (TDM)*).
- The UK has a wide beef supplier base of more than 40 countries. Over the past five years, the UK has imported an average of around 234,000 tonnes swt of beef per year. Country of origin labelling is mandatory in the UK for all red meat products sold to end consumers at retail.
- Ireland has long been the UK's largest beef supplier with an import value share of 58% in 2023–2024 with around two-thirds of this, chilled grassfed product (Source: *Trade Data Monitor (TDM)*).
- British and Irish beef is perceived as fresher and more convenient to purchase, offering a wider variety of cuts and a higher level of trust, particularly in the wake of the 2013 horsemeat scandal which shook public trust in regional meat supply chains.
- Since the UK joined the EU in 1973 and up until Brexit in early 2020, it has been a notable export market for Australian beef in Europe, with the vast majority comprised of chilled beef,

both grassfed and grainfed. After the Australia-United Kingdom Free Trade Agreement (A-UK FTA) came in force in May 2023, Australian exports to the UK have increased significantly, albeit from a small base. Monthly average volumes have more than doubled in 2024 compared to the previous year.

### UK beef imports by supplier\*



Trade Data Monitor (TDM), \*MAT year ending August. Note: Previously country of origin was not collected for UK imports from EU and country of dispatch used instead, From 2022 onwards, country of origin is now used instead with exception of Northern Ireland which still uses country of dispatch and thus grouped into 'other' as origin is not clear

- The Netherlands, the third largest beef exporter to the UK, saw a 16% volume decline in 2024, continuing a downward trend since 2022 (Source: *Trade Data Monitor (TDM)*).



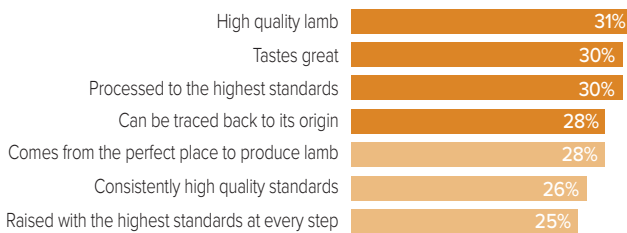
# Sheepmeat

## CONSUMERS



- UK per capita sheepmeat consumption in 2025 is forecast to be 3.9kg, notably higher than the EU average (of 1.5kg) but because of pressure on consumer budgets, is expected to see a continuation of a long-term gradual decline at a CAGR of -0.6% from 2023 to 2028f (Source: GIRA). UK lamb sales in 2025 across all channels are forecast to total around GB£1.37 billion (Source: Fitch Solutions).
- Britons perceive lamb as a superior, great tasting and tender meat, which justifies its price premium. As such, it tends to be considered a 'special' meat, reserved for meals such as on weekends and holidays when there is more time to prepare and enjoy it (Source: MLA Global Consumer Tracker UK 2022).

### UK consumers' associations with Australian lamb

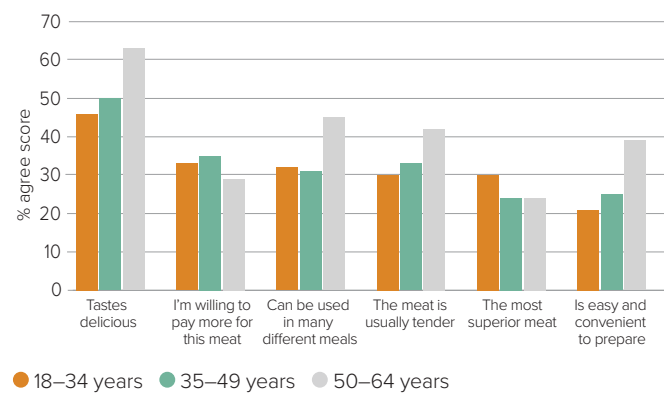


Source: MLA Global Consumer Tracker UK 2022, Base: those who have any awareness of Australian lamb

- Many older consumers have bought lamb at some time and have enough familiarity with it to know how to prepare and cook it. The country has sizable and growing populations of people with Southern Asian, African, Middle Eastern and Caribbean backgrounds that enjoy sheepmeat – comprising around 15% and more than 10 million people (Source: Office of National Statistics (ONS) 2021). There are opportunities to increase lamb's appeal to younger consumers, with 26% of 18–34 year olds less familiar with lamb because they didn't grow up with it.

- Key barriers to increased purchase frequency of lamb besides cost are that some people dislike the taste or smell of the product, and its perceived fattiness (Source: MLA Global Consumer Tracker UK 2022). There may be opportunities to encourage trial of Aussie lamb through education on cooking methods and recipes.
- Red meat production has increasingly been the subject of public discussion in relation to industry impact on animal welfare, greenhouse gas emissions and food safety (Source: Red Tractor) which has contributed to consumption decline. Australian sheepmeat has an opportunity to address some of these concerns by communicating its sustainability credentials, world-leading animal welfare, food safety standards and systems in addition to its other strengths.

### UK consumer perceptions of lamb by age group



Source: MLA Global Consumer Tracker UK 2022

- The UK remains Australia's largest sheepmeat market in Europe. The majority of Australian sheepmeat exports to the UK have been both chilled and frozen lamb leg, frozen mutton leg, frozen lamb and mutton trimmings, lamb and mutton shank and lamb shoulder (Source: DAFF).

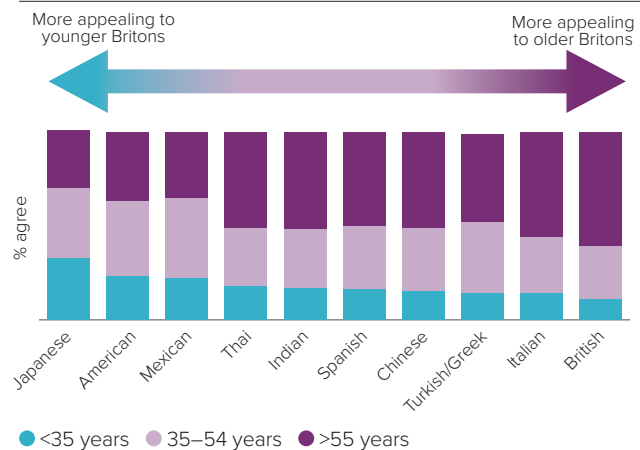
## FOODSERVICE



- Lamb and mutton feature on menus across a range of foodservice channels in the UK, totalling 16 million kilograms in 2024, an increase of 4.8%. The largest lamb sales come from take-away, which includes items like kebabs and curries (Source: Agriculture and Horticulture Development Board (AHDB)). As some of these cuisines typically require the use of halal products, it represents a key opportunity for Australian lamb.
- The UK sector has a large presence of chains in all segments, including pubs and even full-service restaurants where chains contributed an estimated 58% of total sales in 2024 (Source: Global Data).
- The highest penetration of lamb in UK full-service restaurants is in establishments that feature Indian and other Southern Asian, British, Middle Eastern and Caribbean cuisines (Source: GlobalData). Lamb is also used in British and Irish cuisine items in accommodation restaurants and pubs where it is often an option in carvery type establishments.
- Lamb typically features as the main meat, popular in curries, kebabs, pies and roasts. Almost half of Britons (47%) say they experiment with different cuisines when eating out. Emerging cuisines that may help grow sheepmeat consumption in the foodservice channel include Turkish and Lebanese (Source: GlobalData).

- Food delivery services, like UberEats and Deliveroo, are still popular post-pandemic, with 49% of consumers ordering food delivery at least once a month (Source: GlobalData Global Consumer Survey Q2 2024). This trend has led some businesses to establish dark kitchens that focus solely on food delivery.

### Most appealing cuisines by age groups



Source: GlobalData Global Consumer Survey Q1 2024

Q: Which of the following cuisines do you find most appealing? Select your top 5

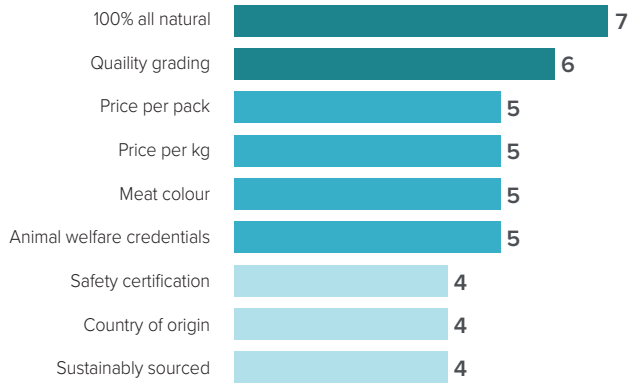




- In the past year, UK retail sales of lamb reached £888.9 million, a 6.7% increase driven by the popularity of roasts and value-added products like marinades and sous vide (Source: AHDB).
- UK consumers purchase most of their lamb from supermarkets, although around 18% also often buy it from butchers (Source: MLA Global Consumer Tracker UK 2022).

- Since the pandemic, UK consumers have remained receptive to new cuisines and foods, with 54% saying they experiment with different recipes at home (Source: GlobalData Global Consumer Survey Q4 2022). Lamb is in a unique position to deliver 'something new' for both existing shoppers of lamb through its versatility, and inspire new shoppers seeking recipe ideas to encourage lamb trial.

### Attributes most motivating to UK lamb shoppers at retail



Source: MLA Global Consumer Tracker UK 2022, Ranking based on relative importance, Max Diff Score



Roast lamb leg is a Sunday favourite

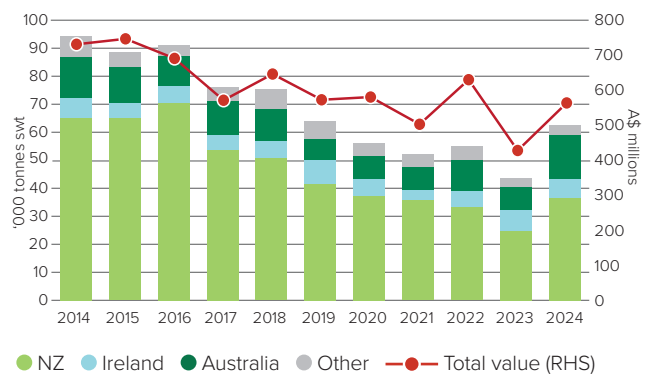
# COMPETITIVE LANDSCAPE



- Approximately 76% of the sheepmeat consumed in the UK is domestically produced, the remainder is filled by imports. UK domestic sheepmeat production is expected to reach around 266,000 tonnes cwe in 2025 and is forecast to fall somewhat over the next few years, in line with a smaller flock and softer demand (Source: GIRA).
- UK sheepmeat imports have increased for the first time in five years, driven by increased supply by New Zealand and Australia as well as other countries like Iceland, Chile and Argentina, from a small base. With the A-UK FTA in force, there has already been increased supply from Australia comparing month-on-month imports to the year prior.
- In 2023–24, the UK imported 60,608 tonnes of imported sheepmeat valued at A\$549 million, with 59% of the volume sourced from New Zealand, 24% from Australia (up from 18% last year) and 11% from Ireland (Source: Trade Data Monitor (TDM)).
- UK sheepmeat import demand has a seasonal component, with consumption spikes around Christmas and Easter. A large proportion of these imports are frozen leg and other bone-in cuts, popular for roasting.
- New Zealand has been by far the largest sheepmeat import supplier to the UK for more than 20 years, providing both chilled and frozen lamb. Supply out of New Zealand has been more constrained in recent years, with reallocation of land to the dairy sector, poor conditions and strong demand from Asian markets such as China. Production and exports are forecast to decline up to 2028 (Source: GIRA). The NZ-UK FTA signed in March 2022 came into force on 31 May 2023, further enhancing New Zealand's market access.

- With Australian production forecast to increase following a period of flock rebuilding, Australian sheepmeat is well-positioned to increase exports to the UK during 2025 and beyond.

### UK sheepmeat imports by supplier\*



Source: Trade Data Monitor (TDM), \*MAT year ending August



## Market access overview – beef

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
<p>Australia-United Kingdom Free Trade Agreement (A-UK FTA)</p> <p>Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)</p>	<p><b>2025:</b> WTO quota: 20% in-quota tariff; above quota tariff 12% and up to GB£1.47/kg</p> <p>A-UK FTA: 0% in-quota tariff; above quota tariff 12% and up to GB£1.47/kg</p> <p>Tariffs to remain at MFN until year 10 and then eliminated</p>	<p><b>Ireland:</b> Under the EU-UK Trade and Co-operation Agreement (TCA), Irish beef can enter the UK tariff and quota-free</p> <p><b>New Zealand:</b> NZ-UK FTA was signed in March 2022 and came into force on 31 May 2023 allowing a duty free transitional quota of 17,960 tonnes in year 3 (2025) which will apply up to 38,000 by year 10 (2032)</p> <p><b>Canada/Mexico:</b> Although, the UK acceded to Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) on 15 December 2024, Canada and Mexico have not yet ratified the UK's accession but expected to do so before year-end, or within 2025</p>	<p>Australia has access to higher HQB* quota volumes than all other competitors, with the highest percentage EU/UK quota split to the UK awarded to Australia of 3,761 tonnes</p> <p>Increasing TRQ* volumes for beef over 10 years, with access to a duty-free transitional quota of 35,000 tonnes on EIF*, rising in equal instalments to 110,000 tonnes in year 10 (2032)</p> <p>From year 11–15 post-EIF onwards, a safeguard will be applied on beef imports exceeding a further volume threshold rising in equal instalments to 170,000 tonnes, levying a safeguard duty of 20% for the rest of the calendar year</p>	<p>All beef supplied to the market must be European Union Cattle Accreditation Scheme (EUCAS) accredited and thus free of hormone growth promotants (HGP)</p> <p>Australia can export processed red meat products, composite products and items such as offals, green runners, pet food, rendered products, coproducts and treated blood products</p>

Best access  Major challenges

Source: DFAT, WTO, DAFF, \*HQB = High Quality Beef, \*TRQ = Tariff Rate Quota, \*EIF = Entry Into Force



## Market access overview – sheepmeat

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
<p>Australia-United Kingdom Free Trade Agreement (A-UK FTA)</p> <p>Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)</p>	<p><b>2025:</b> WTO quota: 0% in-quota tariff; above quota tariff 12% and up to GB£1.47/kg</p> <p>A-UK FTA: 0% in-quota tariff; above quota tariff 12% and up to GB£1.47/kg</p> <p>Tariffs to remain at MFN until year 10 and then eliminated</p>	<p><b>New Zealand:</b> WTO quota of 102,620 tonnes (includes goatmeat)</p> <p>NZ-UK FTA came into force on 31 May 2023 allowing a duty free transitional quota of 35,000 tonnes (out of quota tariff 12%) and up to GB£1.43/kg. By 2038, there will be no tariff or quota</p>	<p>WTO quota: 13,335 tonnes country specific</p> <p>Under A-UK FTA, 36,111 tonnes rising in equal instalments to 75,000 tonnes in year 10 (2032)</p> <p>In the subsequent five years (year 11–15 post-EIF*) a safeguard will be applied on sheepmeat imports exceeding a further volume threshold rising in equal instalments to 125,000 tonnes, levying a safeguard duty of 20% for the rest of the calendar year</p>	<p>No trade restrictive non-tariff barriers currently</p> <p>Australia can export processed red meat products, composite products and items such as offals, green runners, pet food, rendered products, coproducts and treated blood products</p>

Best access  Major challenges

Source: DFAT, WTO, DAFF, \*TRQ = Tariff Rate Quota, \*EIF = Entry Into Force

© Meat & Livestock Australia, 2025. ABN 39 081 678 364. Care has been taken to ensure the accuracy of the information contained in this publication. However, MLA, MDC and ISC ("MLA Group") do not accept responsibility for the accuracy, currency or completeness of the information or opinions contained in this publication. This publication is intended to provide general information only. It has been prepared without taking into account your specific circumstances, objectives, or needs. Any forward-looking statements made within this publication are not guarantees of future performance or results, and performance or results may vary from those expressed in, or implied by, any forward-looking statements. No representation, warranty or other assurance is given as to the fairness, accuracy, completeness, likelihood of achievement or reasonableness of forward-looking statements or related assumptions contained in the publication. You should make your own enquiries before making decisions concerning your interests. Your use of, or reliance on, any content is entirely at your own risk and the MLA Group accepts no liability for any losses or damages incurred by you as a result of that use or reliance.