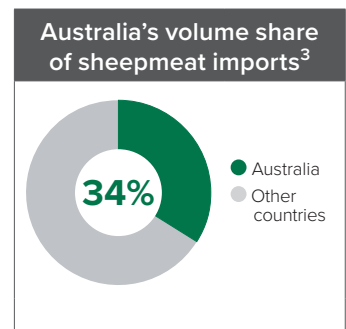
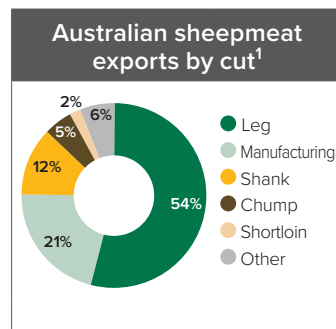
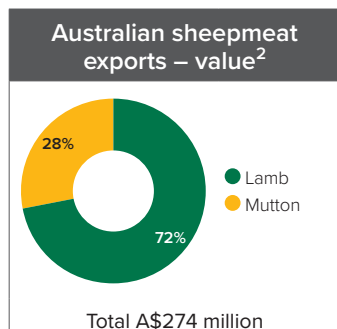
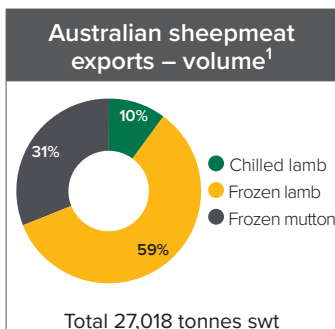
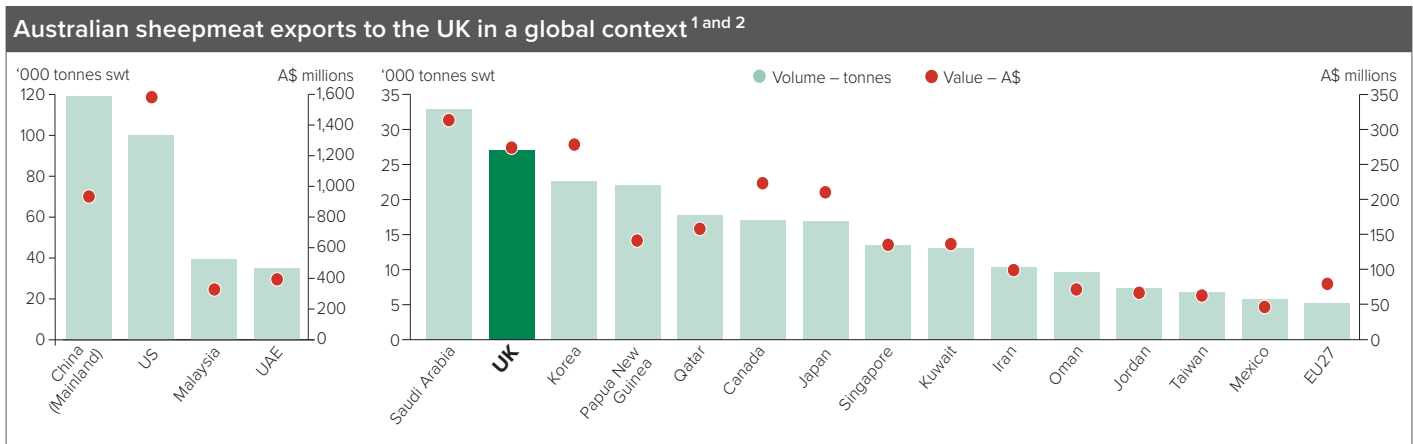
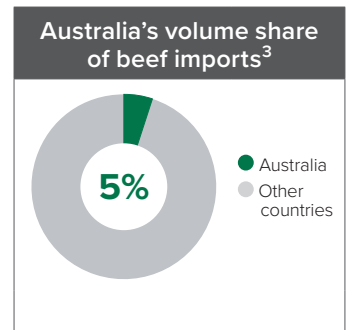
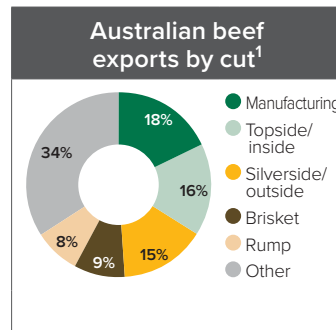
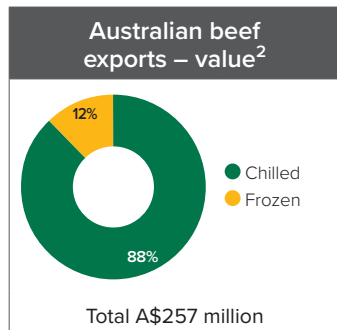
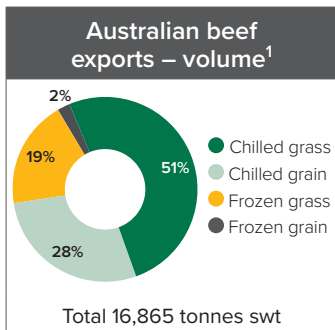
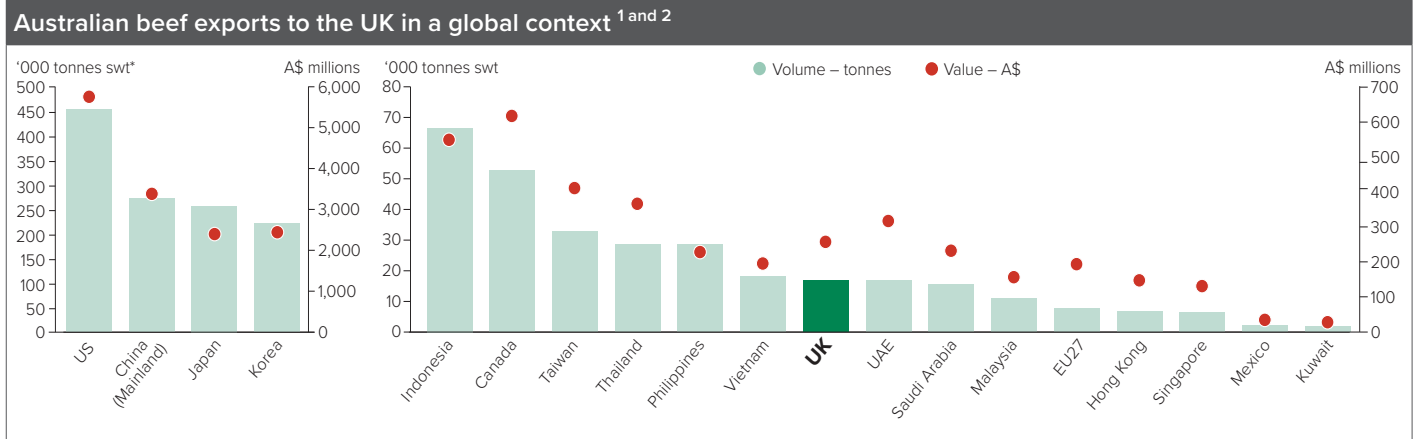


## MARKET SNAPSHOT | BEEF & SHEEPMEAT

**EXPORTS**  
Fast growth on the back of A-UK FTA

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

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



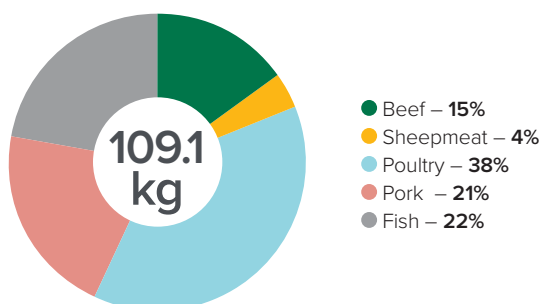
Data source for charts: <sup>1</sup>Department of Agriculture, Fisheries and Forestry (DAFF) 2025, <sup>2</sup>Trade Data Monitor, LLC (TDM), Moving Annual Total (MAT) November 2025, <sup>3</sup>TDM MAT October 2025, \*swt = shipped weight

## CONSUMERS



- United Kingdom (UK) beef consumption of 16.7kg per capita is higher than the European Union (EU) average of 13.8kg, although it has been on a very gradual decline over the past two decades. This has been driven by health and environmental concerns, cautious consumer spending and tightened domestic supply (Source: GIRA).
- Britons have a long history of enjoying beef – it is the second most commonly prepared protein at home behind chicken (Source: MLA Global Consumer Tracker 2025). Beef is positively perceived for its taste and quality, with consumers willing to pay more for it over other meat types.

### Meat consumption per capita



Source: GIRA, kg carcass weight equivalent (cwe) per person per year, 2025 forecast (f)

- Many traditional beef dishes are based on slow cooking or mince, with domestic product generally on the lean side. Britons are less aware of premium beef than the global average, but

interest in high marbled score beef is rising. One in five consumers have purchased products like highly marbled beef, driven by flavour, tenderness, and perceptions of superior quality (Source: MLA Global Consumer Tracker 2025).

- 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 2.9% in 2025 and set to reach GB£5.7 billion by 2029 (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 one of the most trusted import suppliers. Among those aware of it, Australian beef is perceived to be safe, consistently high quality and offers a variety of cuts suitable for meals – 60% 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 2025).

### UK consumers' associations with Australian beef



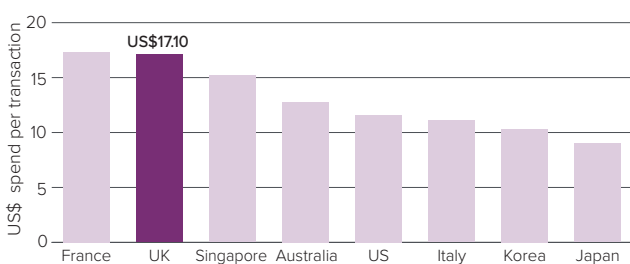
Source: MLA Global Consumer Tracker 2025

## FOODSERVICE



- Dining out is slowly regaining momentum as social habits persist and consumer confidence rebuilds. The foodservice sector in the UK is estimated to be GB£72 billion (US\$93 billion) in 2025, with consumer spend per transaction comparatively higher than the United States (US) and Australia (Source: Euromonitor International). Despite 44% of consumers planning to eat out less, nearly half still intend to socialise out of home, highlighting the significant role of dining in UK social life (Source: GlobalData Global Consumer Survey Q2 2025).
- 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 the number of site closures (Source: IGD).

### Foodservice spend per transaction

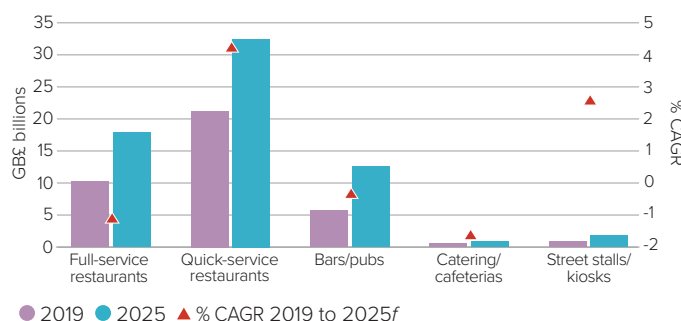


Source: Euromonitor International, 2026f, Data last reviewed August 2025

- Rising interest in international and unique flavours has spurred an expansion of premium beef offerings across the UK food scene.

Diners are exposed to Wagyu of various price points from burgers to steaks. High-end establishments are driving demand, prioritising locally sourced Wagyu, followed by Australian Wagyu and grainfed. But the growth of full-service restaurants is slowing as high operation costs and changing dining habits have led to concerns of profitability and outlet closures (Source: AlixPartners Hospitality Market Monitor).

### UK eating out segment size and growth



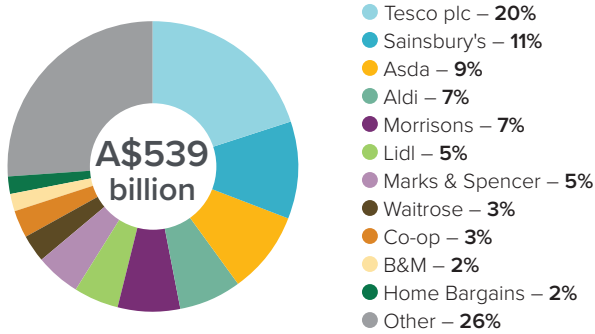
Source: Euromonitor International

- 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. UK imports mostly grainfed and chilled grassfed from Australia, making it among Australia's highest value export markets. The average export unit price in 2025 was A\$16.46/kg, 55% higher than Australia's global export average (Source: TDM).



- The UK grocery retail industry is fragmented but led by major supermarket chains. 70% of UK shoppers purchase beef from supermarkets at least weekly but 29% also purchase beef from butchers at least once a month. The UK also has a small but fast growing online retail sector, with around 11% of consumers having bought beef online at least weekly (Source: MLA Global Consumer Tracker 2025).

## UK top grocery retailers by sales value



Source: IGD, Sales value, 2026; Percentage based on total grocery sales value

- Retailers have traditionally led the 'buy local' movement but tightening domestic supply has led to the gradual appearance of Australian beef cuts like rump and striploin on UK shelves. More welfare certification programs are being adopted to maintain consumer trust and assure shoppers of quality and hormone-free standards.

- Retail growth is underpinned by inflation and population growth. Online is one of the fastest growing channels, from a small base (Source: IGD).
- 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).
- UK consumers are more influenced by ethical, environmentally and socially responsible call outs on products than the global average (Source: GlobalData Global Consumer Survey Q2 2024).
- In the case of on-pack or on-shelf beef purchases, consumers look for perceived naturalness and freshness of the meat (colour and date packed) as well as price per pack over country of origin (Source: MLA Global Consumer Tracker 2025).



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

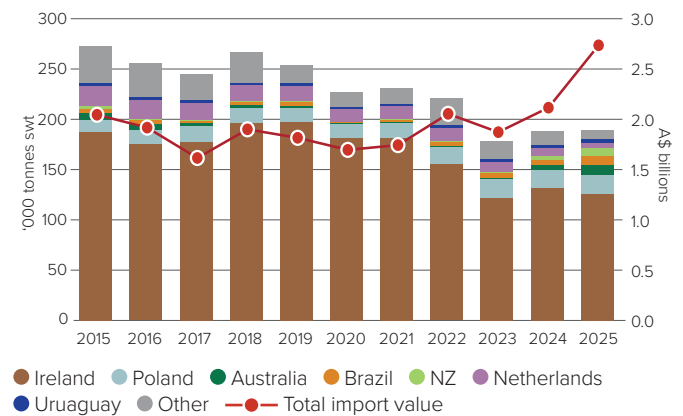
# COMPETITIVE LANDSCAPE



- An estimated 80% of beef consumed in the UK in 2025 was domestically produced. The current outlook is for UK beef production to decline at a CAGR of 1.3% from 2024 to 2029, due to input costs, policy changes 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 0.5% over the same period and import around 373,000 tonnes carcass weight equivalent (cwe) of beef in 2029 (Source: GIRA).
- UK beef import demand, historically hindered by inflation and declining yearly, saw a slight increase of 3% CAGR in the period between September 2024 and August 2025 (Source: TDM).
- The UK has a wide beef supplier base of more than 30 markets. Over the past five years, the UK has imported an average of 236,000 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 57% in the period between September 2024 and August 2025 with around two-thirds of this, chilled grassfed product (Source: TDM).
- British and Irish beef is perceived as safer to eat, of consistent quality standards and fresh (Source: MLA Global Consumer Tracker 2025), 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. Since 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. In the 12 months ending August 2025, Australia's monthly average volume more than doubled compared to the year before, making it the third largest supplier of imported beef to the UK, surpassing the Netherlands (Source: TDM).

## UK beef imports by supplier\*



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

- The Netherlands, the third largest beef exporter to the UK, saw a 40% volume decline in the period between September 2024 and August 2025, continuing a downward trend since 2022 (Source: TDM).



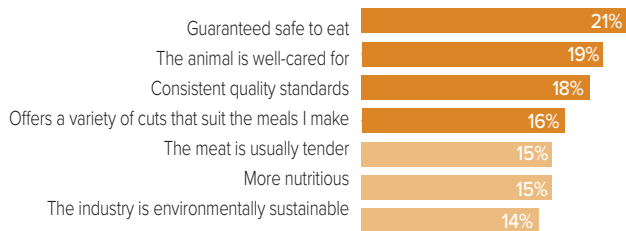
# Sheepmeat

## CONSUMERS



- Sheepmeat consumption per capita in the UK is 16.7kg, which is 2.9kg higher than the EU average. However, pressure on household budgets is expected to decline at a CAGR of 1.0% from 2024 to 2029 (Source: GIRA). UK lamb sales across all channels are forecast to total approximately GB£1.43 billion in 2026 (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 2022).

### UK consumers' associations with Australian lamb

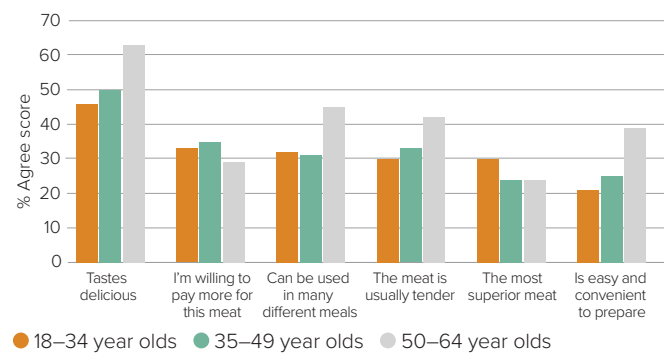


Source: MLA Global Consumer Tracker 2025, Base: those who have any awareness of Australian lamb

- 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 30% of 18–34 year olds less familiar with lamb because they didn't grow up with it (Source: MLA Global Consumer Tracker 2025).

- 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 2025). 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 2022

- The UK remains Australia's largest sheepmeat market in Europe. The majority of Australian sheepmeat exports to the UK are both chilled and frozen lamb leg, frozen mutton leg, frozen lamb and mutton trimmings, lamb and mutton shank and lamb shoulder. Among other cuts, lamb chump exports to the UK have seen a twofold increase (Source: DAFF), reflecting growing demand for diverse lamb products.

## FOODSERVICE

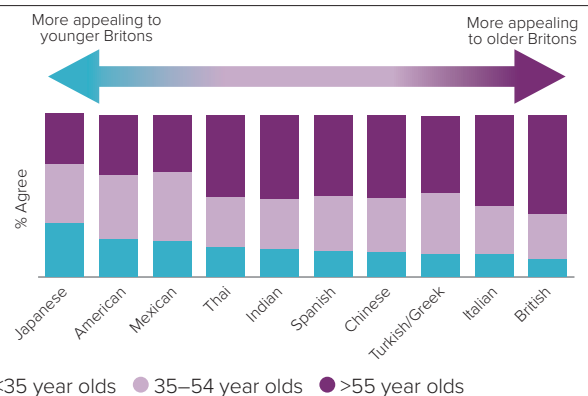


- Lamb and mutton feature on menus across a range of foodservice channels in the UK, totalling more than 17 million kilograms in 2025, an increase of 6.1%. The largest lamb sales come from kebabs (skewered meat), which make up an estimated 50% of total lamb volumes, and curries (Source: Agriculture and 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 has a large presence in chains across all segments, including pubs and full-service restaurants. Chain outlets contributed an estimated 48% of total sales in 2025 (Source: Euromonitor International).
- Lamb is featured prominently in the UK full-service restaurants that serve Indian and other South Asian cuisines. It is also commonly found in British and Irish dishes at accommodation establishments and pubs (Source: GlobalData). But recent shifts in consumption behaviour has led restaurants to move away from traditional course meals, in favour of smaller plates and shared dishes like roast lamb legs. This shift allows businesses to maintain high quality meat while managing costs more effectively.
- Almost half of all Britons (44%) 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 61% of consumers ordering food delivery at least once a month (Source: GlobalData Global Consumer Survey Q2 2025). 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 five

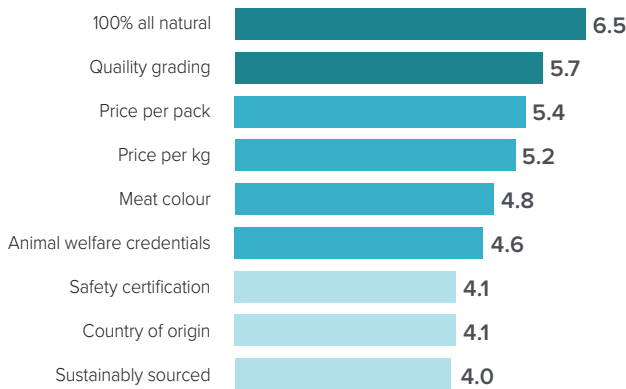




- In 2025, UK retail sales of lamb reached GB£899 million, a 2.6% decline from the year prior, driven by volume decline in fresh cuts and processed products. Steaks were the only exception which saw a 5.4% increase in total sales value, driven by an increase in shopper numbers (Source: AHDB).
- Supermarkets remain the primary retail channel for lamb purchases in the UK, but 41% of lamb buyers also buy their meat from butchers, indicating a preference for specialty meat retailers (Source: MLA Global Consumer Tracker 2025).

- UK consumers are increasingly receptive to new cuisines and foods, with 59% saying they experiment with different recipes at home, up 5% compared to two years prior (Source: GlobalData Global Consumer Survey Q4 2024). There is an opportunity to inspire new shoppers with lamb recipe ideas that can deliver 'something new' and encourage lamb trial among younger consumers.

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



Source: MLA Global Consumer Tracker 2022, Ranking based on relative importance, Max diff score



Roast lamb leg is a Sunday favourite

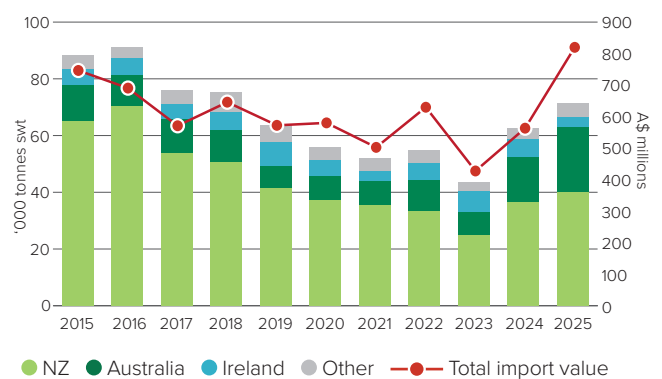
# COMPETITIVE LANDSCAPE



- Approximately 66% of the sheepmeat consumed in the UK is domestically produced, the remainder is filled by imports. UK domestic sheepmeat production is estimated to be 260,000 tonnes cwe in 2025, and is forecast to fall over the next few years, in line with contraction of flock numbers and softer demand (Source: GIRA).
- UK sheepmeat imports have increased for the first time in five years, driven by increased supply from New Zealand (NZ) and Australia as well as other markets like Iceland, Chile and Uruguay, from a small base.
- In the 12 months ending August 2025, the UK imported 72,221 tonnes swt of imported sheepmeat valued at A\$806 million, with 56% of the volume sourced from NZ, 32% from Australia (up from 24% last year) and 5% from Ireland (down from 11% last year) (Source: 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.
- NZ 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 NZ 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 is forecast to decline between 2024 and 2029, which will subsequently affect exports (Source: GIRA). The New Zealand-United Kingdom Free Trade Agreement (NZ-UK FTA) was signed in March 2022, and came into force on 31 May 2023, further enhancing NZ's market access.

- Australian sheepmeat is well positioned to increase exports to the UK, helping to offset any shortfall resulting from a decline in NZ supply. With the Australia-United Kingdom Free Trade Agreement (A-UK FTA) in force, average monthly export volumes have increased by 50% compared to the previous year.

### UK sheepmeat imports by supplier\*



Source: TDM, \*MAT year ending August



## Market access overview – beef

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
<p>The Australia-United Kingdom Free Trade Agreement (<b>A-UK FTA</b>) entered into force 31 May 2023</p> <p>Comprehensive and Progressive Agreement for Trans-Pacific Partnership (<b>CPTPP</b>)</p>	<p><b>A-UK FTA:</b> 0% in-quota tariff; above quota tariff 12% and up to GB£1.47/kg. Above quota tariffs remain at Most Favoured Nation (MFN) rate until year 10 and then eliminated</p> <p>World Trade Organization (WTO) quota: 20% in-quota tariff; above quota tariff 12% and up to GB£1.47/kg</p>	<p><b>Ireland:</b> Under the EU-UK Trade and Co-operation Agreement (<b>TCA</b>), Irish beef can enter the UK tariff and quota-free</p> <p><b>New Zealand:</b> New Zealand-United Kingdom Free Trade Agreement (<b>NZ-UK FTA</b>) came into force on 31 May 2023, allowing a duty-free transitional quota of 20,940 tonnes in year four (2026) which will increase to 38,820 tonnes by year 10 (2032)</p> <p><b>Canada/Mexico:</b> The UK signed the accession protocol to enable it to join the <b>CPTPP</b> in July 2023, however preferential access negotiations are still in progress</p>	<p><b>A-UK FTA:</b> Increasing TRQ* volumes for beef, with access to a duty-free transitional quota of 60,000 tonnes in year four (2026). This will rise in instalments to 110,000 tonnes in year 10 (2032)</p> <p>From years 11–15, a safeguard tariff of 20% can be applied on beef imports exceeding a further volume threshold rising in equal instalments to 170,000 tonnes</p> <p>HQB** (WTO): Australia has access to a HQB quota of 3,761 tonnes cwe</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 offal, green runners, pet food, rendered products, coproducts and treated blood products</p>

Best access  Major challenges

Source: Department of Foreign Affairs and Trade (DFAT), WTO, DAFF; \*TRQ = Tariff rate quota, \*\*HQB = High quality beef



## Market access overview – sheepmeat

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
<p>The Australia-United Kingdom Free Trade Agreement (<b>A-UK FTA</b>) entered into force 31 May 2023</p> <p>Comprehensive and Progressive Agreement for Trans-Pacific Partnership (<b>CPTPP</b>)</p>	<p><b>A-UK FTA:</b> 0% in-quota tariff; above quota tariff 12% and up to GB£1.47/kg. Tariffs to remain at MFN until year 10 and then eliminated</p> <p>WTO quota: 0% in-quota tariff; above quota tariff 12% and up to GB£1.47/kg</p>	<p><b>New Zealand:</b> WTO quota of 102,620 tonnes (includes goatmeat)</p> <p>New Zealand-United Kingdom Free Trade Agreement (<b>NZ-UK FTA</b>) came into force allowing a duty-free transitional quota of 35,000 tonnes (out of quota tariff 12% and up to GB£1.43/kg). The quota will increase to 50,000 tonnes from 2028. By 2038, there will be no tariff or quota</p> <p>It is a condition of the <b>NZ-UK FTA</b> that the FTA quota is unable to be accessed until 90% of the WTO quota is utilised</p>	<p><b>A-UK FTA:</b> Increasing TRQ volumes for sheepmeat over 10 years, with access to a duty-free transitional quota of 41,667 tonnes in 2026. This will rise in instalments to 75,000 tonnes in 2032</p> <p>From year 11–15, a safeguard tariff of 20% can be applied on sheepmeat imports exceeding a further volume threshold rising in equal instalments to 125,000 tonnes</p> <p>WTO: 13,335 tonnes country specific</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

© Meat & Livestock Australia, 2026. 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.