



Call for Industry Views

Red Meat Industry Vision for Wales; 2026-30

Closing date for responses: 02 September 2025

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Introduction

Hybu Cig Cymru – Meat Promotion Wales (HCC) is an industry-led organisation, Welsh Government owned arms-length body, responsible for the development, promotion and marketing of Welsh red meat.

HCC is currently engaging with industry to develop a new '*Red Meat Industry Vision for Wales*' (2026-30).

What this 'Call for Industry Views' is about

HCC is seeking feedback from the red meat industry to support the development of the new Vision. This in turn will be central to developing industry plans for future delivery of both industry and consumer facing activity.

Responses from all stakeholders are welcome and will help shape the final Vision document.

The key points to this engagement are surrounding specific themes that have been identified during industry engagement process in first half of 2025, these include:

- Theme 1: Livestock numbers
- Theme 2: Processing capacity
- Theme 3: Trade
- Theme 4: Consumption
- Theme 5: Environmental research
- Theme 6: Farm profitability
- Theme 7: Industry advocacy and defence.

Your input is valuable in shaping the future vision for the red meat sector in Wales.

Current industry document

In November 2022, HCC refreshed its overarching *Red Meat Vision for Wales*, this document can be found here: [Red Meat Vision for Wales \(2022-26\)](#).

Questions

Below are the seven questions focused on specific **key themes** that have been identified during the initial engagement period with industry.

When answering these questions respondents should consider their views on an industry wide basis and where possible indicate what they see as HCC's future role supporting this area. There should also be thought as to how any activities identified should be delivered and how these could be funded.

In your response, please state whether you are responding as an individual or representing the views of an organisation. If you are responding on behalf of an organisation, please make it clear who the organisation represents and, where applicable, how you gathered the views of members.

Theme 1: Livestock numbers

Since 2005 there has been a 33.3% and 8.4% decrease in the beef breeding herd and breeding ewe numbers in Wales¹, respectively. The fall in livestock numbers can be attributed to many factors such as profitability challenges, changes to government farm support structures, increased pressure on land use and availability from other agricultural sectors and industries, together with potential structural changes and labour availability issues.

The continued decline in the Welsh beef herd and the fall in the national flock has had, and will continue to have, an impact on beef and lamb production in Wales, which has a consequential bearing on supporting businesses further down and across the supply chain such as abattoirs, veterinary practices, livestock auctioneers, feed suppliers and manufacturers.

Some have suggested that the fall in the national herd and flock can be seen as a positive for Wales, particularly when considering current calculations for greenhouse gas (GHG) emissions from agriculture. There is also the potential impact that the fall in livestock numbers may have had on the improved market price position, although the long-term impact of demand from a diminishing supply base has yet to be fully realised.

Q1: What do you see as the medium (4-5 years) to long term (10+ years) patterns for beef and sheep numbers in Wales; where do you see the biggest opportunity and challenges for growth within the red meat sector in Wales?

¹ <https://www.gov.wales/survey-agriculture-and-horticulture-june-2024>

Theme 2: Processing capacity

The number of red meat processing facilities in Wales has been on a steady decline over the last three decades. Currently there are fifteen red meat primary processing facilities in Wales with four of them processing circa. 80% of the volume. In 2000 there were 30 red meat processing facilities in Wales.

There are a number of interconnected factors for the reduced processing sites including declining livestock numbers, rising production costs, labour shortages due to staff retention and recruitment, increased legislation and changing consumer preferences.

Ensuing a thriving processing sector is critical to the red meat industry in Wales, as this would support food safety and traceability, secondary processing in Wales, producer and consumer choice, lower travelling times for animals, and also, secure employment and local economies. The current trend of reduced processing would challenge these benefits.

Q2: Would you support increased assistance for primary and secondary red meat processing in Wales, and how do you think this should be delivered?

Theme 3: Trade

HCC, working with industry partners and processors, have sought to support and facilitate trade both with the UK and export markets over the past two decades. Having a multi-market approach supports carcase balance and therefore underpins prices as the supply chain can target product to those willing to pay the optimum for each element of the carcase.

Around 65% of the lamb produced in Wales is consumed in the UK (with England being the largest market), while the remaining 35% is consumed in export markets. Of these export markets, the EU is the largest destination and receives over 90% of the volume of lamb exported from Wales annually.

In the case of beef produced in Wales, around 85% of the volume produced is consumed within the UK, and 15% is exported globally – again, with the EU being the biggest market and receiving over 85% of the volume from Wales.

For the UK and export markets, having diverse outlets for the product within retail, foodservice and the ethnic trade for product supports the whole sector. Over time the importance and share of these different outlets has changed and this will continually evolve as consumer preferences adapt.

Q3: Would you support increased focus on trade development within the UK and/or export market and what do you believe are the biggest challenges and opportunities to achieving this?

Theme 4: Consumption

The OECD-FAO Agricultural Outlook projects a global increase in red meat consumption over the next decade, but with significant regional variations and shifts in consumption patterns. Global beef and sheep meat consumption are both forecast to increase, with projected growth of 11% and 16% respectively by 2033, largely driven by population growth, rising incomes, shifting dietary preferences and expansion of the foodservice sector.

In the UK consumption patterns of red meat over the last decade has varied, with demand for beef and pork remaining relatively static while the consumption of lamb has fallen slightly.

A number of demographic and economic factors would be responsible for the current consumption patterns, such as religious beliefs, disposable income, lifestyle and dietary requirements. There's also some evidence suggesting a decline in consumer meat cooking knowledge, particularly among younger adults. This trend is influenced by the demand for convenience, leading to a potential shift in how consumers engage with meat.

Q4: What do you believe are the major opportunities and challenges to increasing the consumption of Welsh red meat, both in the UK and globally?

Theme 5: Environmental research

The red meat industry, similar to other industries in Wales, has been under an increasing need over the last decade to track and lower its environmental impact. For the agricultural sector there is also a need to minimise and reverse any negative impact production systems have on biodiversity and nature.

Research undertaken by HCC has shown that the Welsh climate, land and extensive grass-based production systems, makes it comparatively suitable to produce livestock from an environmental viewpoint. There is also clear evidence that there are opportunities to lower

emissions from red meat production further through improved efficiencies and, potentially, new technologies.

A challenge within this area has been identified as the lack of comparative metrics and data sets on the impact of different production methods in and across countries. This has led to a number of different, and at times unsubstantiated claims both in favour and to the detriment of the red meat sector.

Q5: What research do you think should be undertaken to further improve and evidence Welsh red meat's sustainability credentials in terms of GHG emissions and its role within biodiversity maintenance and creation; and what in your views are the barriers to doing this?

Theme 6: Farm profitability

The most recent cost of production information highlights a significant difference in the financial performance on red meat farms in Wales. For 2023/24, the *Farm Business Survey in Wales* reported that there was a 77p/kg liveweight (lw) difference in lamb production cost between farms in the top third compared to the average, the difference for a suckler calf production system between a top third and average farm was 87p/kg lw.

Despite significant and numerous efforts by the different organisations involved in supporting the red meat industry in Wales, the dispersed nature of the supply base (leading to a low number of livestock per holding and hence high fixed costs per livestock unit), regulatory conditions and some climatic challenges such as wetter milder winters, has resulted in Wales' livestock production cost being consistently higher than our key global competitors (e.g. New Zealand in lamb).

Research has shown that many of the drivers for lowered cost of production would support increased productivity and would also lower the carbon footprint from the sector (such as shorter finishing times and reduced calving intervals).

Q6: What do you believe are the biggest barriers to establishing a lowered production cost/higher productivity base on red meat farms in Wales, and how do you believe these should be overcome?

Theme 7: Industry advocacy and defence

HCC continues to proactively highlight the importance of red meat production in Wales in terms of its role for employment creation and maintenance, societal and cultural benefit, human health, and food production and security.

This is carried out alongside highlighting that Wales has many environmental advantages over global and other protein market competitors with regards its topography and climate for sustainable production.

Over the next decade, it is likely that there will be increasing pressure on the red meat industry to highlight its positive role within human health, environment, society and food security. This work will include defending and rebutting any false negative narratives that may arise.

Q7: What information and evidence do you believe will bring greatest benefit to advocate and defend the role of red meat production in Wales?

Theme 8: Any other comments

Q8: Do you have any additional views on the current challenges and opportunities for the red meat industry in Wales?

How to respond

Summary of questions to answer against:

- **Theme 1: Livestock numbers**
Q1: What do you see as the medium (4-5 years) to long term (10+ years) patterns for beef and sheep numbers in Wales; where do you see the biggest opportunity and challenges for growth within the red meat sector in Wales?
- **Theme 2: Processing capacity**
Q2: Would you support increased assistance for primary and secondary red meat processing in Wales, and how do you think this should be delivered?
- **Theme 3: Trade**
Q3: Would you support increased focus on trade development within the UK and/or export market and what do you believe are the biggest challenges and opportunities to achieving this?
- **Theme 4: Consumption**
Q4: What do you believe are the major opportunities and challenges to increasing the consumption of Welsh red meat, both in the UK and globally?
- **Theme 5: Environmental research**
Q5: What research do you think should be undertaken to further improve and evidence Welsh red meat's sustainability credentials in terms of GHG emissions and its role within biodiversity maintenance and creation; and what in your views are the barriers to doing this?
- **Theme 6: Farm profitability**
Q6: What do you believe are the biggest barriers to establishing a lowered production cost/higher productivity base on red meat farms in Wales, and how do you believe these should be overcome?
- **Theme 7: Industry advocacy and defence**
Q7: What information and evidence do you believe will bring greatest benefit to advocate and defend the role of red meat production in Wales?
- **Theme 8: Any other comments**
Q8: Do you have any additional views on the current challenges and opportunities for the red meat industry in Wales?

When answering the questions consider an industry wide basis and where possible indicate what HCC's role should be in supporting this view. There should also be thought on how the activities identified should be funded and delivered.

The closing date for responses is **Tuesday, 02 September 2025**, and you can respond in any of the following ways:

- **By email:** you can email your response, outlined against each question, and send it to Vision2030@hybucig.cymru. Include 'Red Meat Industry Vision for Wales, 2026-30' in the subject line of your email.
- **By post:** and send it to:

Hybu Cig Cymru – Meat Promotion Wales (HCC)
Ty Rheidol
Aberystwyth
SY23 3FF

UK General Data Protection Regulation (UK GDPR)
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HCC will be data controller for this Call for Industry Views and for any personal data you provide as part of your response to this work.

The lawful basis for processing information in this data collection exercise is our public task; that is, for the purpose of delivering the statutory functions bestowed on us by Welsh Government under the Red Meat Industry (Wales) Measure 2010.

Any response you send us will be seen in full by HCC staff dealing with the issues which this Call for Industry Views is about.

A summary of responses will be produced following this process, which will be available upon request. The name and address (or part of the address) of the person or organisation who sent responses will be within the summary however no comments will be attributable to responders. If you do not want your name or address published, please tell us this in writing when you send your response, and we will then redact this information from the summary.

You should also be aware of our responsibilities under Freedom of Information legislation and that HCC may be under a legal obligation to disclose some information.

If your details are published as part of the Call for Industry Views response then these published reports will be retained indefinitely. Any of your data held otherwise by HCC will be kept for no more than three years.

Your rights

Under the data protection legislation, you have the right:

- to be informed of the personal data held about you and to access it
- to require us to rectify inaccuracies in that data
- to (in certain circumstances) object to or restrict processing
- for (in certain circumstances) your data to be 'erased'
- to (in certain circumstances) data portability
- to lodge a complaint with the Information Commissioner's Office (ICO) who is our independent regulator for data protection

For further details about the information HCC holds and its use, or if you want to exercise your rights under the UK GDPR, please see contact details below:

Data Protection Officer
Hybu Cig Cymru – Meat Promotions Wales
Tŷ Rheidol,
Parc Merlin,
Aberystwyth
SY23 3FF
e-mail: dataprotectionofficer@hybucig.cymru

The contact details for the Information Commissioner's Office are:

Wycliffe House
Water Lane Wilmslow
Cheshire
SK9 5AF
Tel: 0303 123 1113
Website: <https://ico.org.uk>