Hybu Cig Cymru
Meat Promotion Wales

HCC Market Bulletin

September 2025

“ HMRC has recently released UK trade figures for the first 6 months of 2025. This month’s Market Bulletin looks at these figures in greater detail. ”

Glesni Phillips – Intelligence, Analysis and Business Insight Executive

In the first six months (H1) of 2025, beef production in the UK decreased by 4% compared to the same period in 2024, according to Defra data. In contrast, sheep meat production saw a rise of 3%, whilst pig meat production grew by 4% on the year. *Note: the red meat products referred to in this document is for the trade of fresh & frozen red meat product only (which does not include offal or processed product).*

BEEF

According to HMRC data, UK beef **exports** during H1 of 2025 totalled around 51,300 tonnes, a near 9% decline year-on-year, yet the value of those exports rose 19% to £316.9 million a reflection of the strong domestic farmgate prices. Lower volumes shipped to Ireland (-15%) and the Netherlands (-18%) were the principal drivers of the fall in volumes. Ireland did however remain the largest single destination with volume totalling some 14,600 tonnes (equivalent to 28% of total exports). Increasing volumes of UK beef are being shipped to both France and Canada, with France being the standout second destination (less than 1,500 tonnes behind Ireland). With domestic beef production down 4% year-on-year, tighter supply at home is likely to have limited volumes available for export.

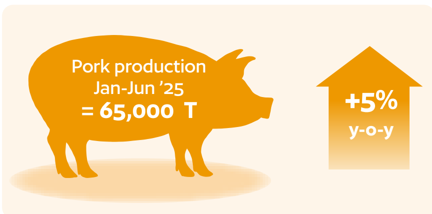
UK beef **imports** were broadly flat (+0.2%) at 120,400 tonnes but remain above historical averages - around 7% higher than the 2020-24 five-year average. The value of these imports climbed sharply by nearly 26% to £857.5 million. Ireland remained the main supplier, however its share of inbound beef eased from 77% to 73% as Irish beef imports fell by 5% on the year. Increased volumes of beef arrived from Brazil (+2,300 tonnes), Australia (+1,900 tonnes), Poland (+1,600 tonnes), and New Zealand (+1,500 tonnes).

SHEEP MEAT

Sheep meat **exports** rose markedly in H1 of 2025, reaching 43,250 tonnes (a 16% increase on the year) with export value up 14% to £334.0 million. The increase in value reflects strong farmgate prices across the UK, whilst a higher year-on-year production level would have allowed for greater exporting opportunities. Increased volumes were sent to both EU and non-EU countries, with much of the growth accounted for by a 24% increase in shipments to France, which took about 57% of UK exported volume. As the UK sheep meat supply typically increases during the second half of the year, there may be more product available for export later into 2025.

UK sheep meat **imports** also increased, up 7% to 36,160 tonnes, the highest H1 level since 2019 (at 38,100 tonnes). This increase was driven largely by a 3,400-tonne rise in imports from Australia following the new trade arrangement and competitive pricing in the southern Hemisphere. New Zealand remained the largest single supplier, providing roughly 58% of imports in H1 of 2025, despite a decrease in the volume received so far in 2025.

PORK



Pork **exports** rose by 5% to about 65,000 tonnes in H1 of 2025, while export value fell by around 7% to £121.5 million. Increased exports were likely linked to a 4% increase in domestic pigmeat production (according to data from Defra).

Pork **imports** declined by 5% in volume to 158,000 tonnes and import value fell by nearly 12%. A decrease in the volume received from Germany (-59%) was the primary driver behind the fall in total imports, whilst Denmark – the UK’s main supplier – exported an additional 2,800 tonnes to the UK during H1.

Trade in Wales

According to recent trade data; the volume of beef exported from Wales during H1 of 2025 is down 8% on year-earlier levels, at an estimated 7,200 tonnes, whilst the value of the shipments rose by 19%. This is likely a result of domestic supply constraints combined with strong farmgate prices. For sheep meat, export volumes were up an estimated 14% to 14,000 tonnes, with value up 13% on the year.

source: HCC estimates based on HMRC data

What does this mean for industry?

Tighter UK beef supplies and strong farmgate prices are supporting higher export values but constraining volumes. As the sustained high prices are now also filtering through to consumers, this may alter the demand for product. Increased shipments of sheep meat suggests it has remained competitive on the global market despite strong domestic prices, supported by steady demand from the EU (particularly France). This has supported the sector whilst production has been rising.

CATTLE

Prices – week ending 20th September

The average deadweight prices in England and Wales for steers stood at **638.5p/kg**. This was:

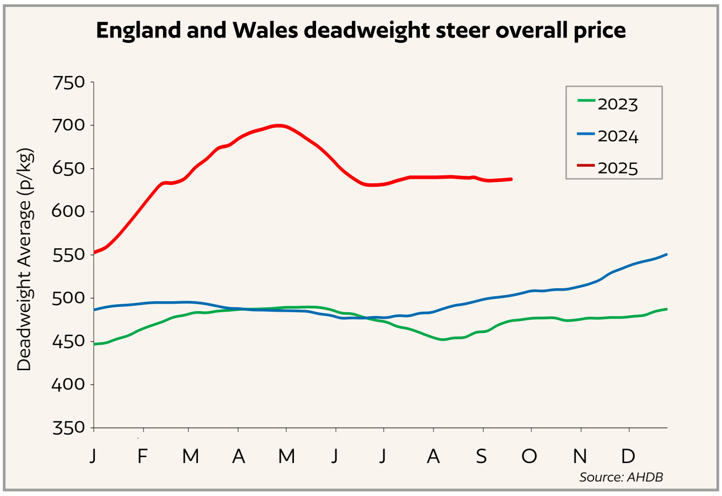
- + 1.9p on the previous week,
- 135.7p above year-earlier levels.

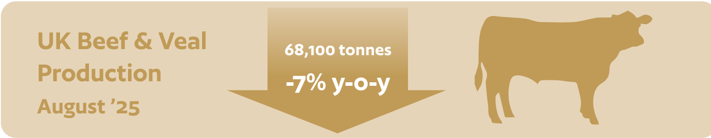
The deadweight prices for other cattle categories were as follows -

- Heifers: 634.1p/kg (+1.6p on the week),
- Young bulls: 632.8p/kg (+7.1p on the week), and
- Cull cows: 506.8p/kg (-0.3p on the week).

Throughput – August 2025

- Total cattle throughput at UK abattoirs = 203,300 head – down 8% on the year.
- Total prime cattle throughput = 153,500 head – down 7% on the year.
  - ➢ *steers -8%, heifers -8%, and young bulls -0.2%*
- Average prime cattle carcase weights = 350.0kg (+5.8kg on the year).
- Adult cattle throughput = 44,700 head – down 10% on the year.





SHEEP

Prices – week ending 20th September

The deadweight* lamb price in GB averaged **670.2p/kg**. This was:

- +10.1p on the previous week
- +29.1p compared with year-earlier levels,
- 132.2p higher than the 5-year average (2020-24 average: 538.0p/kg).

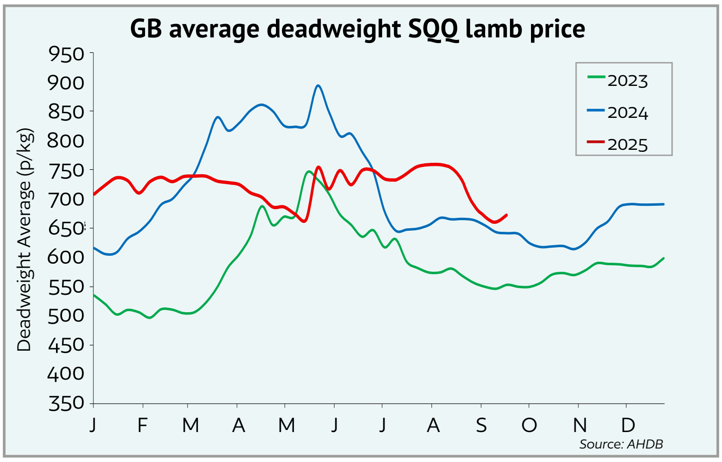
Numbers coming forward reached 34,200 head. This was:

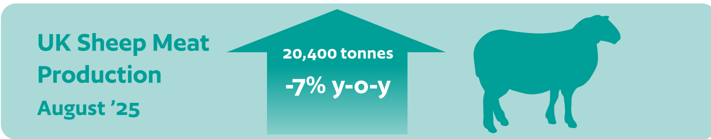
- -8% on the previous week
- - 17% compared with year-earlier levels

**Note: Old season lambs are shown from 1 January to the third Monday in May and new season lambs thereafter.*

Throughput – August 2025

- Total sheep throughput at UK abattoirs = 985,900 head – down 7% on the year.
- Lamb throughput = 867,800 head – down 7% on the year.
- Average lamb carcase weights = 20.0kg (+ 0.3kg).
- Cull ewe and ram throughput = 118,100 head – down 9% on the year.





PIGS

Prices – week ending 20th September

The EU-spec Standard Pig Price (SPP)* in GB stood at **206.7p/kg**. This was:

- +0.1p on the previous week,
- - 2.3p compared with year-earlier levels,
- 17.4p higher than the 5-year average (2020-24 average: 189.4p/kg).

**Note: the APP is currently unavailable as the data does not meet validation thresholds. The SPP (which uses different data sources) is unaffected.*

Throughput – August 2025

- Total pig throughput at UK abattoirs = 839,700 head – down 6% on the year.
- Clean pig throughput = 825,000 head – down 5% on the year.
- Average clean pig carcase weights = 89.3kg (-0.2kg on the year)
- Sow and boar throughput = 14,700 head – down 11% on the year.