QMS Quarterly Cattle Supply Update Q3 2026

Purpose:

To provide an update on cattle supply in Scotland based on the latest cattle population data from July 2026.

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Summary of Key Points

- Continuing low slaughter in 2026 has supported a small build-up of prime cattle on Scottish farms, with the rate of increase in the number of males and beef-sired females aged 12-30 months moving beyond April's +1.6% to reach +1.8%. The key demographic of 18-24 months showed a slightly stronger increase than in April, of 2.2%, while the 24-30-month group, which had begun the year smaller than twelve months before, pushed 3.4% above year-earlier levels. A 1.1% uplift at 12-18 months supported young bull slaughter over the summer and should continue to support availability through the autumn and into winter.

- At GB level, numbers aged 12 to 30 months edged into marginal year-on-year growth in July after two years of declines. Numbers continued to look tight in the key 24-30-month slaughter age group, down 3%, but the decline at 18-24 months softened to only 0.3%, while a 1.5% uplift at 12-18 months should begin to provide some offsetting support as the year progresses.

- In theory, increased calf numbers should lead to softer competition at store sales, but this has not been the case so far in 2026, with auction volumes remaining tight and prices holding at similar levels to 2025. This could reflect the shifting balance of production, with suckler-bred calves remaining in tight supply, and beef-sired dairy calves often being managed in specific supply chains rather than traded at store sales. While the July population data points to good availability of longer keep stores at autumn sales, yearlings may be in shorter supply, reflecting lower calf registrations in the second half of 2025.

- Under-30-month slaughter fell much faster than expected based on population data in 2025, signalling lower slaughter rates across GB, though to a lesser extent in England than in Wales or Scotland. The slaughter rate in Scotland appears to have continued to undershoot in 2026, showing little sign of recovery. A reduced heifer kill, potentially as producers look to stabilise herds, is sustaining downwards pressure on the slaughter rate, along with sluggish end-market demand. A frontloaded marketing profile in 2025 is also clouding the picture when abattoir throughput is compared with 2025 but there has only been a small year-on-year rebound in slaughter in summer 2026 from the very low levels seen in summer 2025.

- In 2025, a further small reduction in the net outflow of cattle born in Scotland limited the overall decline in kill at Scottish abattoirs. However, the outflow remained elevated well above pre-2022 levels, and it widened again in the first half of 2026, driven by a jump in moves directly to slaughter of 36% compared to 2025. Moves to English farms and auctions continued to fall back from their 2022 peak but remain elevated. Meanwhile, slaughter of cattle born in England & Wales at Scottish abattoirs fell to a new low.

- In July 2026, there were 379,300 beef-sired females aged 30 months and over on Scottish holdings. This was a 0.6% decline from a year earlier, which was the smallest reduction seen since the beginning of 2022. ScotEID cattle population data for early-September 2026 suggests that the rate of decline has softened further, easing to around 0.3%.

- The stronger momentum in the herd between spring and summer 2026 could result in a small expansion in 2027 if it was to be sustained through the second half of 2026. An increase in beef-sired females aged 24-30 months began to support the herd in April and this continued in July.

- While also softening, the decline in the suckler herd in England & Wales has continued to outpace Scotland, with a 1.6% year-on-year reduction in beef-sired females over 30 months in July.

- Following a market downturn, Scotland's dairy herd moved into contraction at the start of 2026 after two years of growth, and the rate of decline accelerated in April. However, the pace of decline slowed in July, suggesting that the period of contraction could be much shorter-lived than expected, with less of an impact on future supplies than feared. By contrast, the dairy herd decline accelerated further in England & Wales, potentially having an impact on prime cattle supplies at GB level in 2028.

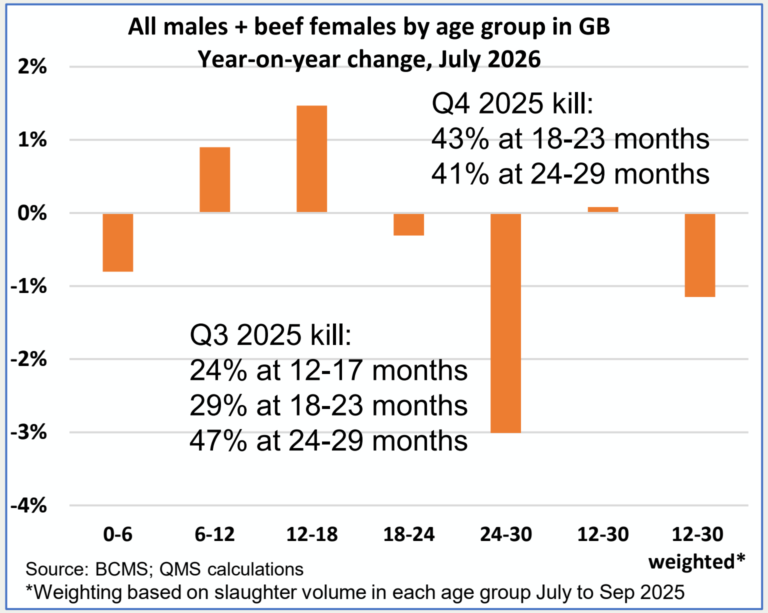
- Overall UK beef import volumes remained stable relative to year-earlier levels in the first half of 2026 whereas exports showed significant growth, signalling soft domestic demand.

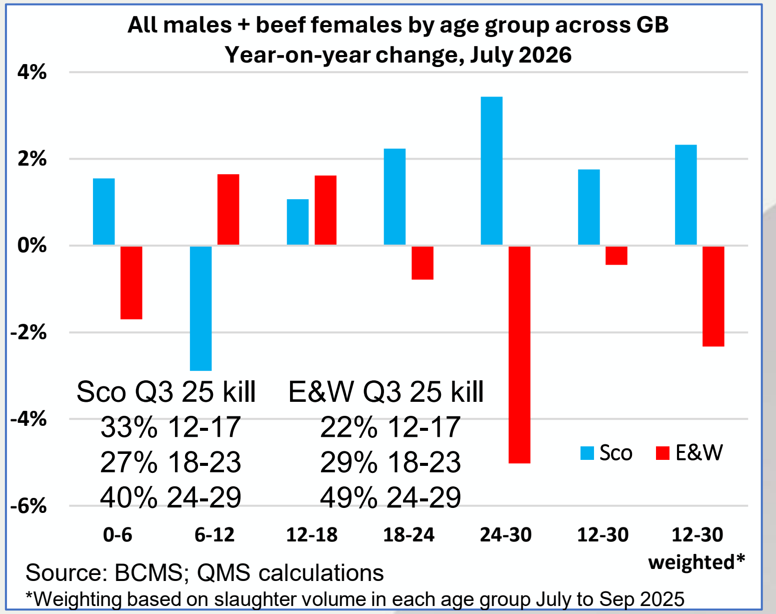
- Non-EU import penetration appears to have steadied at close to 30% of UK beef imports, averaging 5,700t per month between July 2025 and June 2026. It will be interesting to see if a softening of EU beef prices and higher slaughter in the Irish Republic leads to any shift back towards EU beef. Despite this substantial rebalancing, the Irish Republic remained the dominant supplier in the first half of 2026, accounting for 64% of deliveries, although this was down from 74% a year earlier and 77% in 2024. New Zealand has become the second largest supplier, accounting for 11% of imports at the start of 2026, ahead of Australia on 8.5%. Favourable market access relative to Brazil due to Free Trade Agreements has enabled further substantial market share growth from Australia and NZ in 2026 whereas Brazil's gains have been more limited.

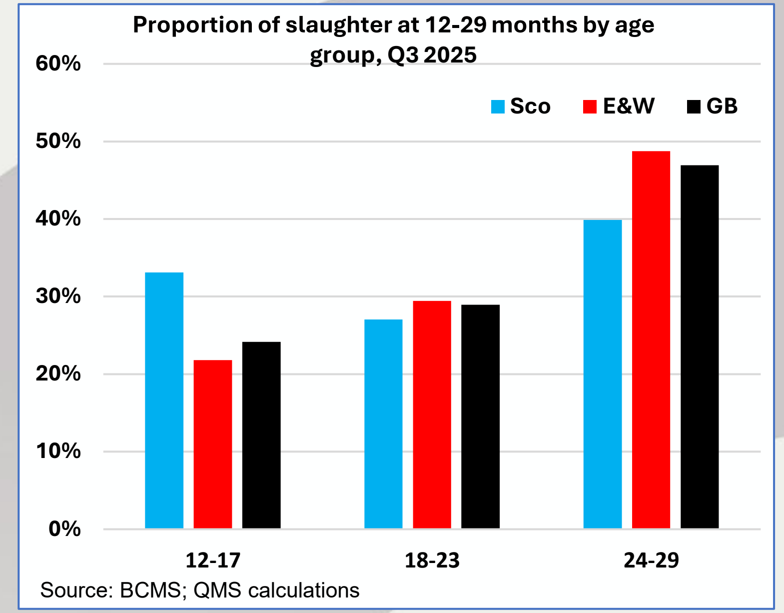
- Looking at the key Meating Our Potential metrics, on a red, amber, green scale, the rating for beef cow numbers has been changed to amber from red as the herd moves closer to stabilising, while productivity has been rated green, and the outflow has been rated as amber. Beef cow numbers and productivity appear to have shown further improvement in 2026 but there has been an increased outflow of cattle directly to slaughter.

* Please note, population figures for under-30-month cattle are based on all males and beef-sired females. Dairy females are excluded. Beef-sired cattle are all non-dairy breeds

Prime Cattle Availability – improved availability in Scotland while E&W remains tight







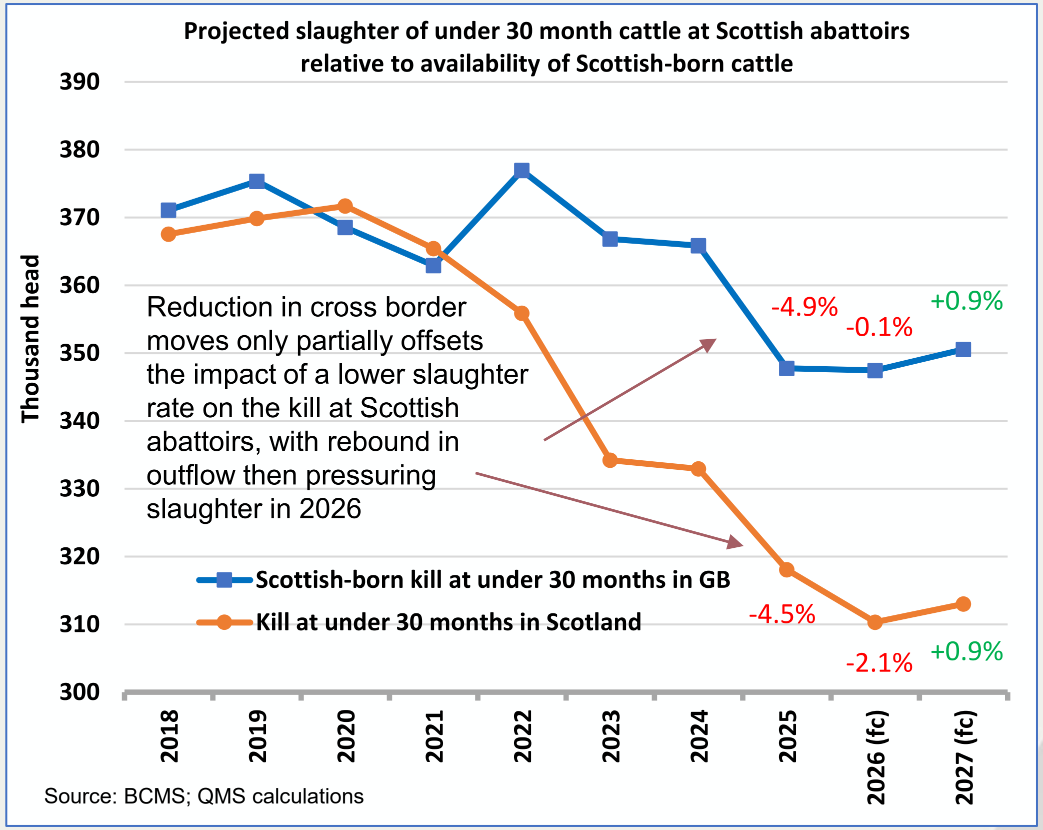
Continuing low slaughter in 2026 has supported a build-up of prime cattle numbers on farm in Scotland, with the year-on-year increase in the number of cattle aged 12-30 months edging beyond April's +1.6% to reach +1.8% in July. Numbers were up 2.2% in the key 18-24-month demographic. Meanwhile, having remained tight as the year began, older prime cattle reversed into increase in April, with the year-on-year increase accelerating to +3.4% in July. Increased supplies at 12-18-months (+1.1%) supported young bull processing this summer and should provide some continuing support to supplies in the second half. Weighted for slaughter age in Q3, the modelled prime cattle population was up by 2.3%.

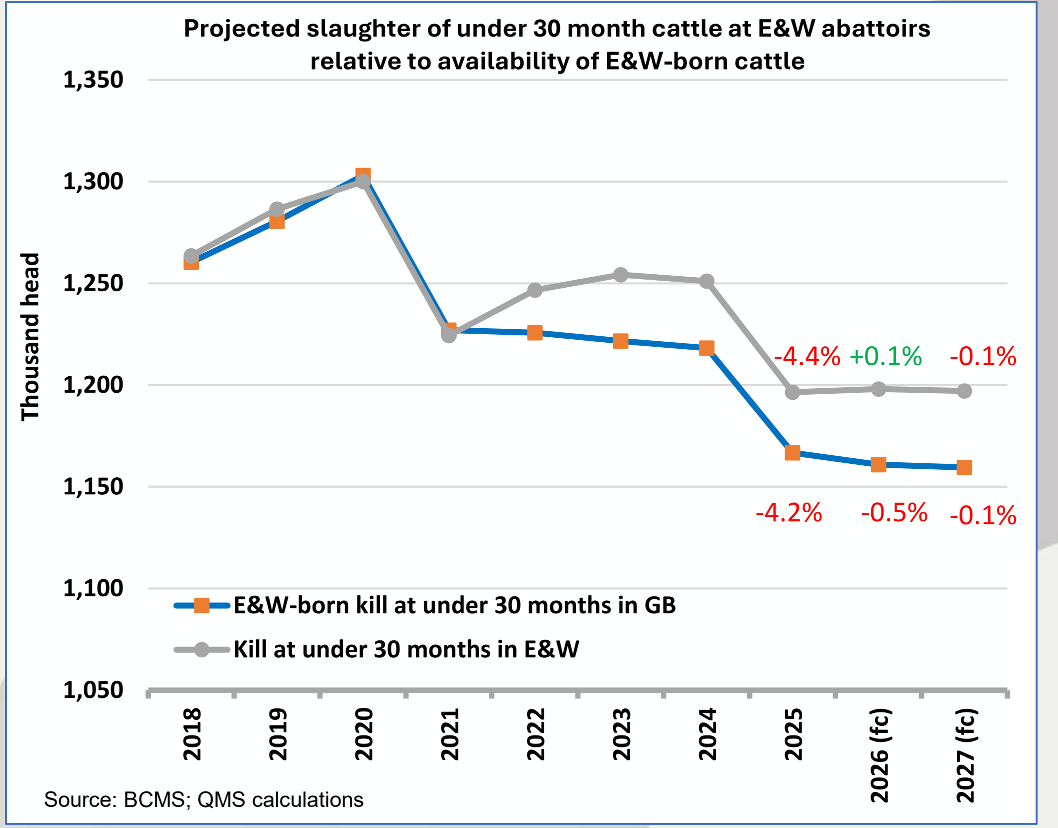
The July population data suggests that numbers on farm should remain higher than last year in Scotland through the autumn and into winter. However, if improved producer confidence continues to limit heifer slaughter and sluggish end-market demand limits processor competition for cattle, slaughter could continue to undershoot.

At GB level, numbers aged 12 to 30 months edged into marginal year-on-year growth in July after two years of declines. Numbers continued to look tight in the key 24-30-month slaughter age group, down 3%, with the Scottish increase partially offsetting a sharp decline in England & Wales, but the decline at 18-24 months softened to only 0.3%, while a 1.5% uplift at 12-18 months should begin to provide some offsetting support as the year progresses.

In theory, increased calf numbers should lead to softer competition at store sales, but this has not been the case so far in 2026, with auction volumes remaining tight and prices holding at similar levels to 2025. This could reflect the shifting balance of production, with suckler-bred calves remaining in tight supply, and beef-sired dairy calves often being managed in specific supply chains rather than traded at store sales. While the July population data points to good availability of weaner stores at autumn sales, yearlings may be in shorter supply, reflecting lower calf registrations in the second half of 2025.

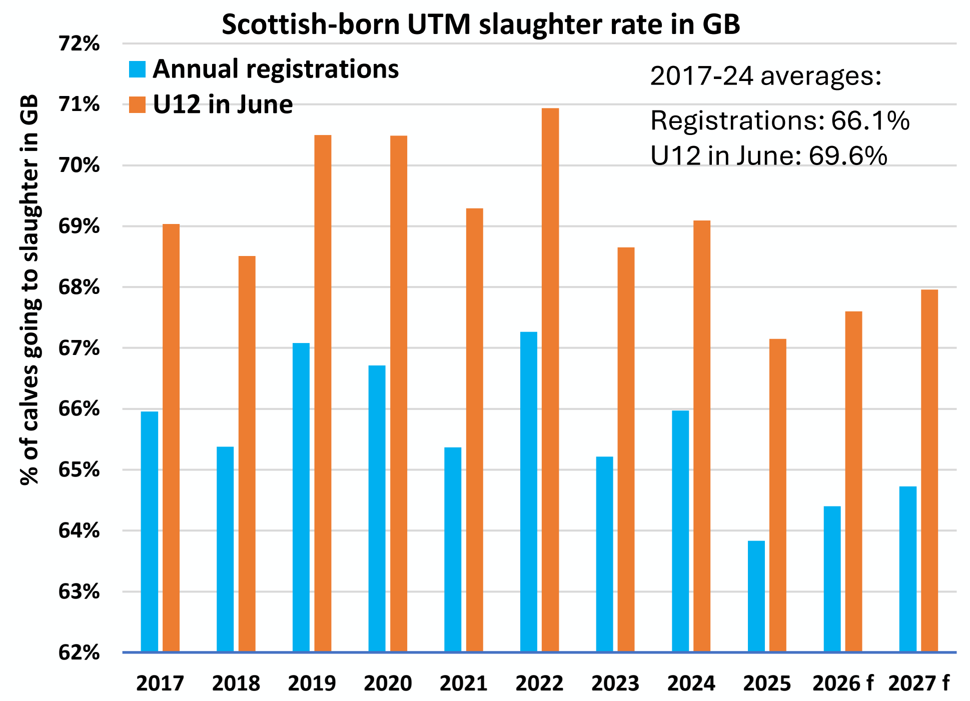
Projected slaughter of cattle aged under 30 months at Scottish abattoirs in 2025 and 2026



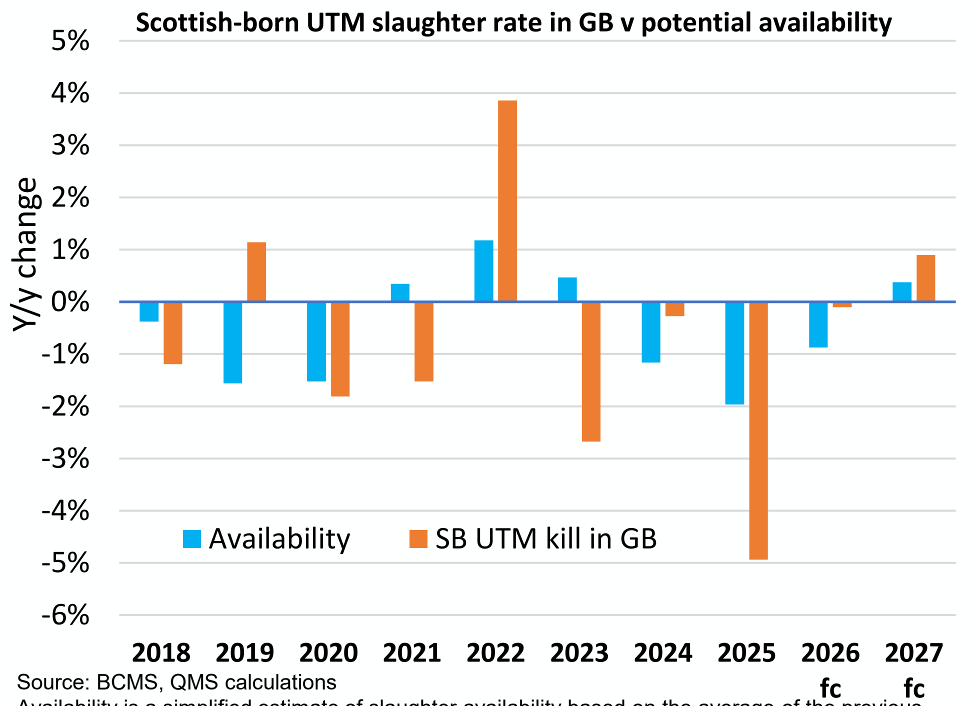


- Starting point: average of previous two years' calf crops
- Slaughter rates fell back sharply in Scotland and Wales in 2025, and more modestly in England. The general reduction was influenced by a lower volume of demand following the surge in consumer prices, plus there had been increased slaughter rates in 2024.
- For 2026, a partial rebound in slaughter rates has been factored in, as the volume of demand begins to slowly recover but farmers move towards stabilising herds. While a lower kill in the first half may signal the lack of a rebound in slaughter rate, last year's slaughter profile was front-loaded, complicating the forecasting process, but a more limited rebound in slaughter rate than previously expected has been forecast.
- To estimate the kill at Scottish abattoirs, cross-border slaughter rates relative to calf crops in Scotland, England and Wales have been adjusted following changes in moves during the first half of 2026. As a result of a larger net outflow, the forecast kill at Scottish abattoirs now shows a 2% decline while numbers edge up in E&W.
- Initial 2027 forecasts point to fairly stable slaughter numbers, with the potential for a small increase in Scotland, based around a slight uptick in the calf crop, a further slight rebound in slaughter rates, and cross border moves steadying relative to calf crops.

Slaughter rates



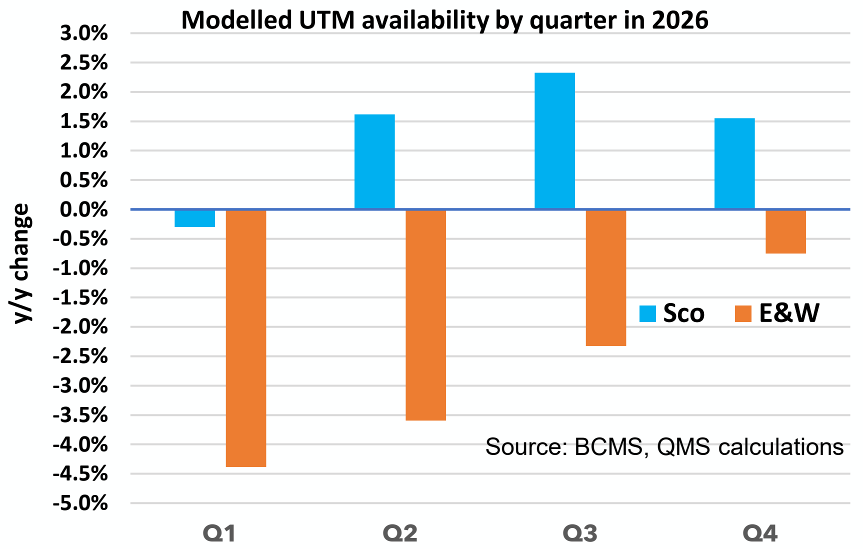
Source: BCMS, QMS calculations
Slaughter of Scottish-born UTM cattle at abattoirs across GB relative to the average of the previous two years' calf crops



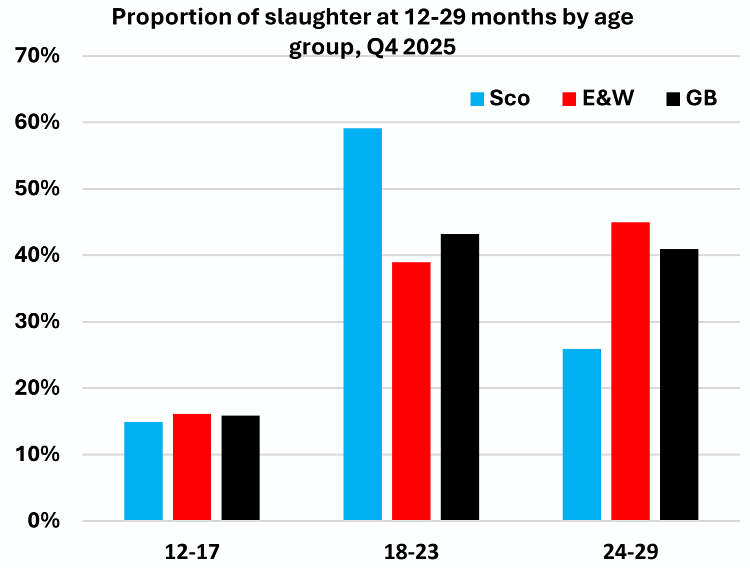
Source: BCMS, QMS calculations
Availability is a simplified estimate of slaughter availability based on the average of the previous two years' calf crops – useful for looking at the y/y change. Forecast slaughter rate in 2026 is now based on a very limited rebound in slaughter rate.

- Slaughter rates fell by around two percentage points in 2025
- If they were to return to a long-term average level in 2026, Scottish-born UTM slaughter could rise by 2.3% despite a smaller calf crop
- SB UTM slaughter in GB fell by 5% in 2025 compared to a 2% reduction in the modelled calf crop (note: modelled calf crop from which slaughter animals are drawn from in 2025 is the average of the 2023 and 2024 calf crops)
- In 2026, the modelled calf crop is 1% lower than in 2025 but the low slaughter rate in 2025 has supported numbers on farm in 2026
- A partial rebound in slaughter rate could support a small increase in kill of less than 1% in 2026, while an unchanged low rate could see a near-1% reduction. Weak slaughter in 2026 points towards a more limited rebound.
- Offsetting a potential rebound in slaughter rate has been a move towards heifer retention – this has been signalled in the price reporting data with the heifer share consistently lower y/y between mid-2025 and mid-2026. In 2027, this move towards herd stabilisation is forecast to continue to limit the rebound in slaughter rate which could be driven by an improving volume of demand.
- A change in cross-border movements could result in a variation between the Scottish-born kill in GB and the kill in Scotland, and a higher net outflow has placed downwards pressure on slaughter at Scottish abattoirs in 2026 (see page 10).

Prime Cattle Slaughter in 2026 – modelled quarterly availability profile based on the July population data and quarterly slaughter by age group in 2025



Simplified model where y/y change in population by age group is adjusted by the quarterly share of slaughter in the previous year at 12-17, 18-23 and 24-29 months. Q3 2026 population groups projected forward through 2026 – e.g. projected Q3 2026 18-24-month group based on 18-24 group in Q3, while the projected Q4 2026 18-24 group is based on an average of the Q3 groups aged 12-18 and 18-24 months.



Source: BCMS; QMS calculations

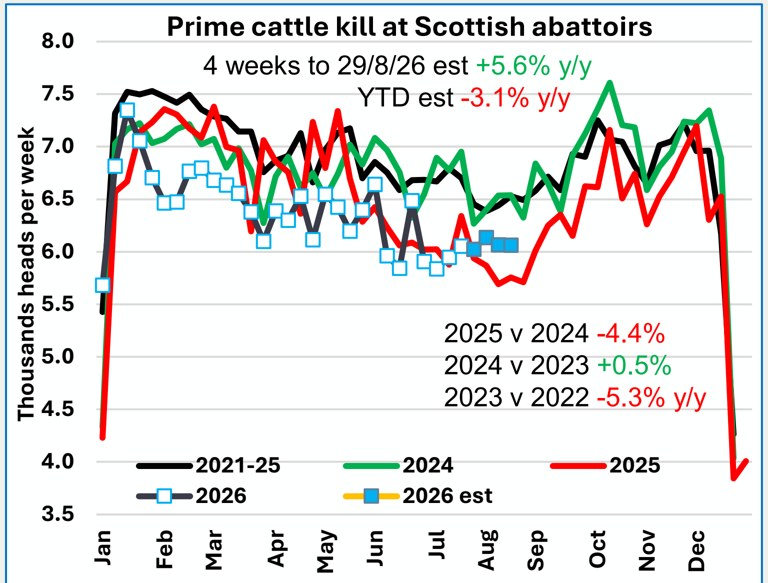
- As a guide to seasonal supplies in 2026, quarterly availability has been projected forward through 2026 from the July population by age group based on a simplified model using the main age groups and their share of slaughter at under 30 months by quarter in 2025. For example, in Q3 2026, the projected year-on-year change in the pool of cattle aged 18-24 months is based on the Q3 population in the 18-24 month age group while the Q4 projection of the 18-24 month group is based on the average of the year-on-year changes in those aged 12-18 and 18-24-months in July 2026. These figures are then weighted by the group's share of slaughter in 2025. Please note that this modelling does not account for fluctuations in cross-border movements or adjustments to slaughter rates.

- This simplified modelling points to availability for slaughter running around 2% above year earlier levels in Scotland in the second half.

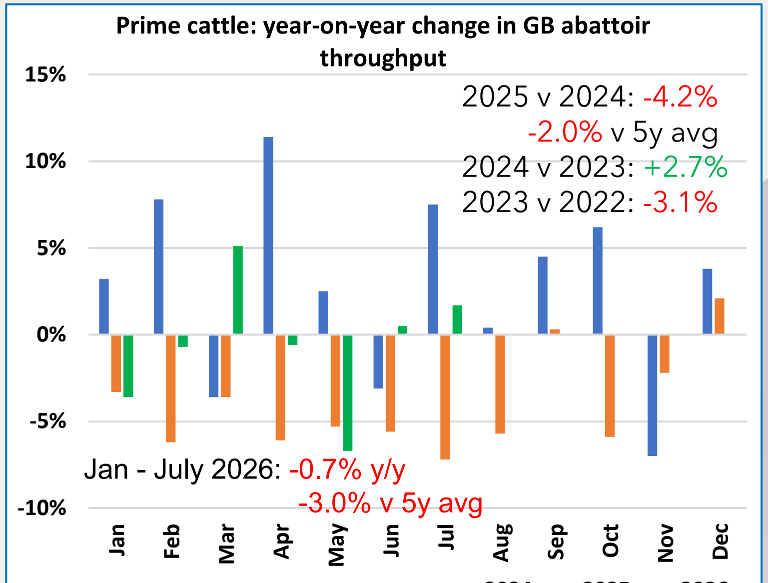
- In England & Wales, numbers continue to look tight in the second half, but the declines narrow further in Q3 and Q4 as lower supplies of older prime cattle begin to be offset by increased supplies of younger prime cattle. However, slaughter has surprised to the upside so far in Q3, potentially squeezing supplies later in the year.

- Availability looks set to remain tighter in England & Wales than in Scotland as the important group aged 18-24 months in July was up 2.2% year-on-year in Scotland while being down 0.8% south of the border. The 24-30 month population continues to show increases in Scotland and declines in England, where it is more important.

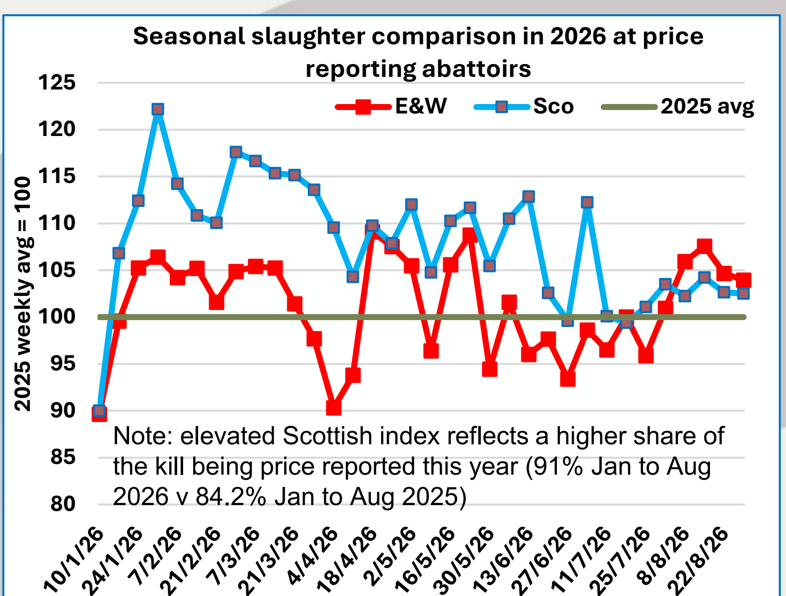
Prime cattle slaughter in 2026 – seasonally low slaughter through the summer, with slight year-on-year increases relative to the very weak summer 2025 levels



Source: Scottish Government; QMS calculations



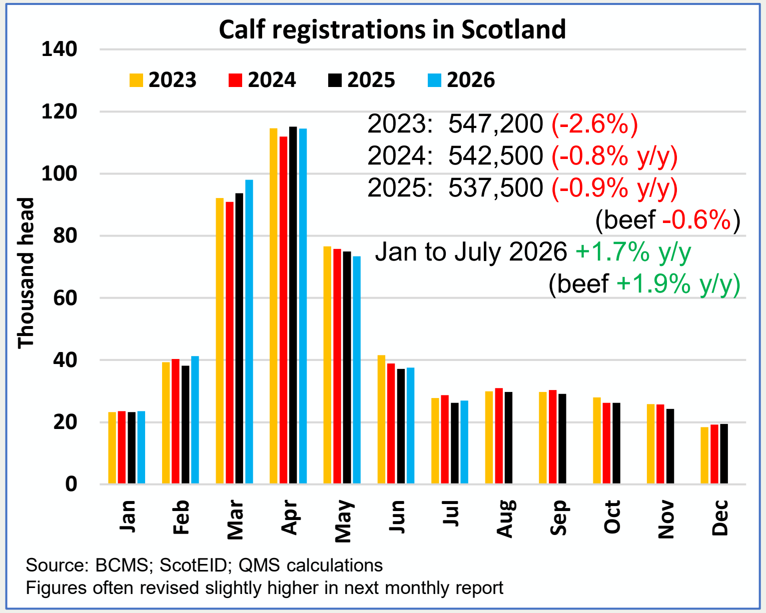
Source: Defra; QMS calculations

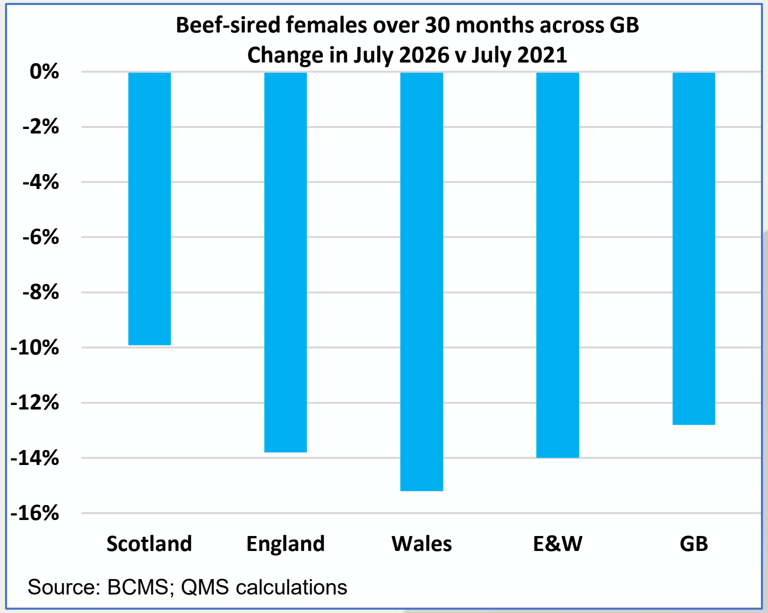


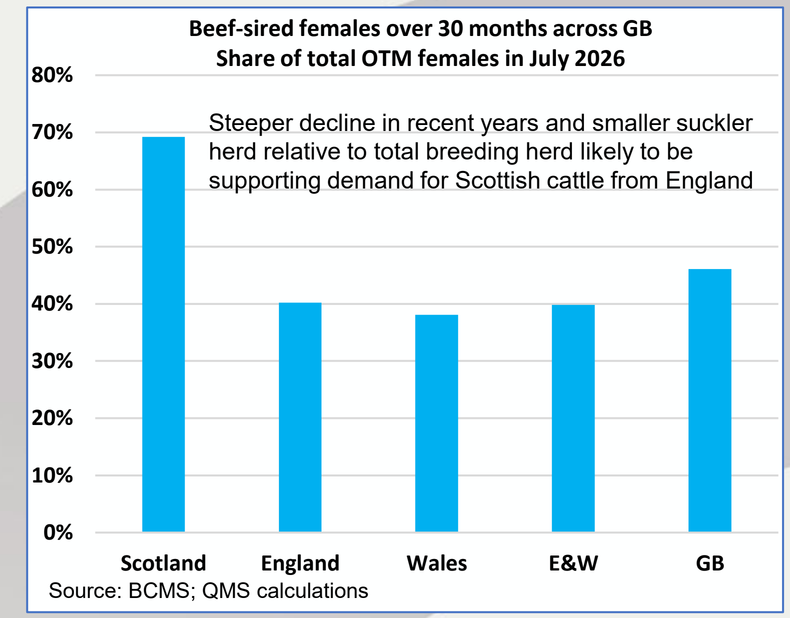
Source: AHDB; QMS calculations

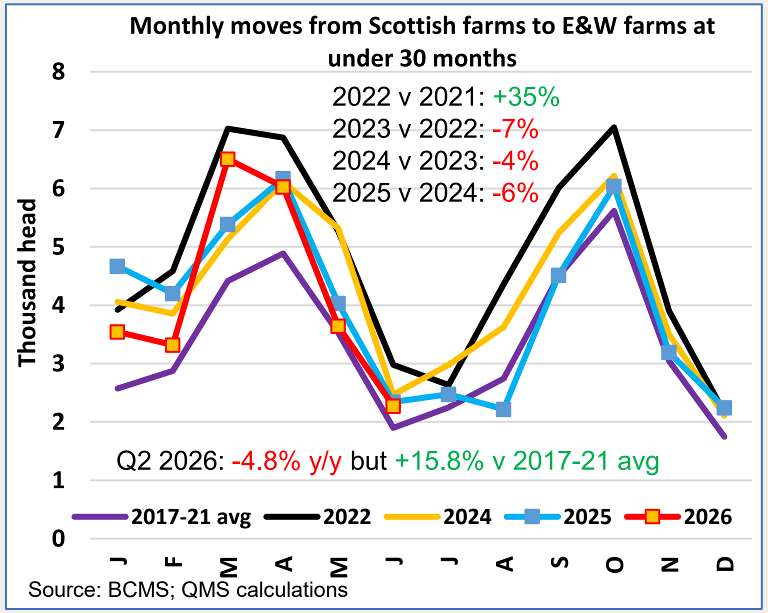
- Prime cattle slaughter has been at a seasonally low level since mid-June in Scotland. However, numbers have not fallen as steeply as they had in 2025, resulting in some small year-on-year increases in July and August.
- In England & Wales, the weekly price reports point to surprising strength for the time of year in weekly slaughter in August. If this has been driven by short-term factors like weather or higher market prices, there is the potential for a more limited seasonal upturn than usual as we move into the autumn.
- Based on seasonal trends, estimated slaughter in the first half at Scottish abattoirs has been consistent with an annual slaughter level around 2.5% lower than in 2025, despite being down by around 4% midway through the year. This reflects the frontloaded slaughter profile in 2025 and general softness of the kill in 2026.
- However, while throughput is down significantly, prime beef production has fallen more slowly due to increased carcase weights. Scottish Government slaughter data highlights a 2.6% year-on-year increase in the average prime cattle carcase weight in the first seven months of 2026, suggesting that prime beef production fell by 1.6% year-on-year compared to the 4% reduction in throughput.
- It should be highlighted that strength in the deadweight price reporting sample in 2026 has not been fully repeated in the QMS levy returns. Any cattle bought at auctions, flat-rate purchases and contract kill are excluded from deadweight price reporting, so a jump of around seven percentage points in the share of the reported prime kill in 2026 (from 84% to 91%) is interesting, suggesting structural change within the sector. Around 450 more prime cattle could be being price reported on each week in 2026 relative to 2025.
- South of the border, the deadweight price reported kill only fell marginally in 2025 against a significant reduction in the overall prime cattle kill reported by Defra (-3.7%), highlighting a further shift towards deadweight price reporting. However, changes in deadweight numbers have been closer to Defra's slaughter survey in 2026, suggesting a stabilisation in the price reporting sample.
- Slaughter has been more stable this year in England & Wales, despite numbers on farm looking tighter than Scotland. Higher imports from and lower exports to Scotland have had an influence and there has been less of a drop-off in the heifer share of the prime kill (see page 11).

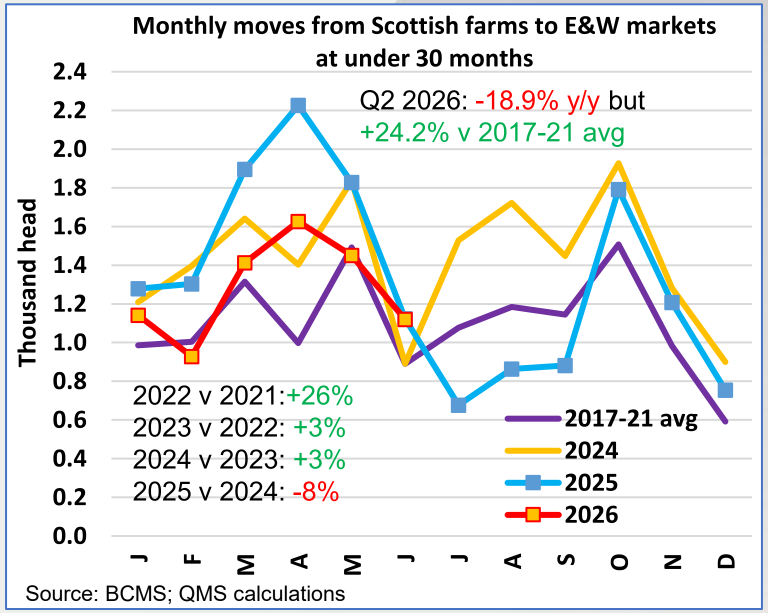
Drivers of prime and store cattle availability and demand in Scotland

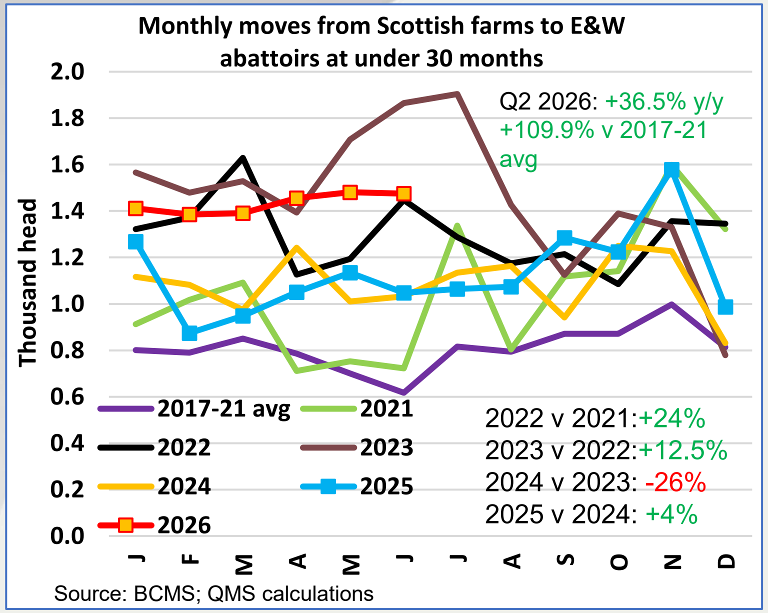






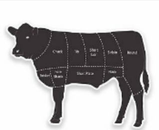






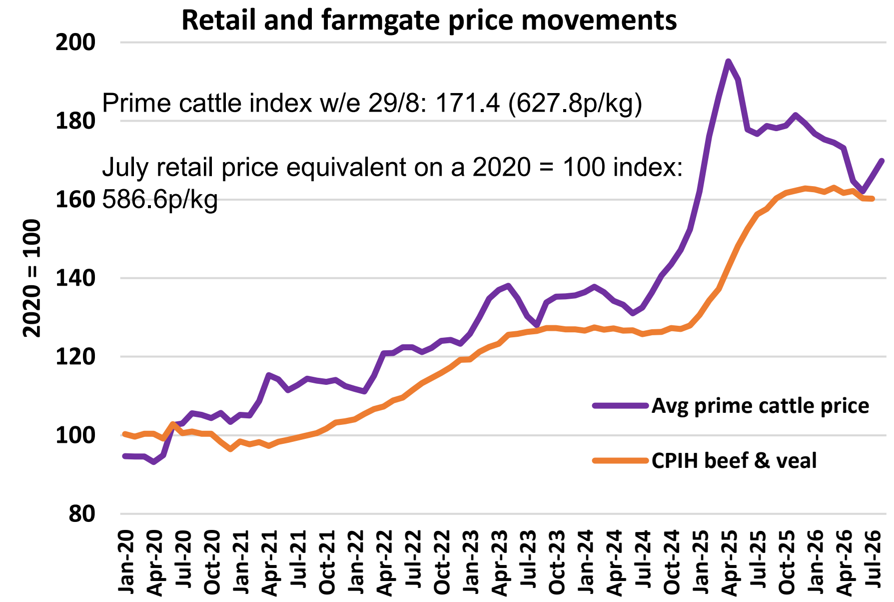
Please note that some animals moving to farms in England & Wales are effectively slaughter moves, with only a small number of days between move and slaughter

Drivers of prime cattle demand in Scotland



BEEF
12 weeks to 9th August 2026

	GB		Scotland	
	Actual	% change y/y	Actual	% change y/y
Value (£m)	558.6	3.2%	59.6	9.6%
Volume (t)	43,731	-3.1%	4,450	-1.0%
Avg price (£/kg)	12.77	6.5%	13.40	10.7%
Penetration*	60.3%	-2.0%	64.3%	-4.4%
Frequency**	4.1	-0.1%	4.3	6.1%

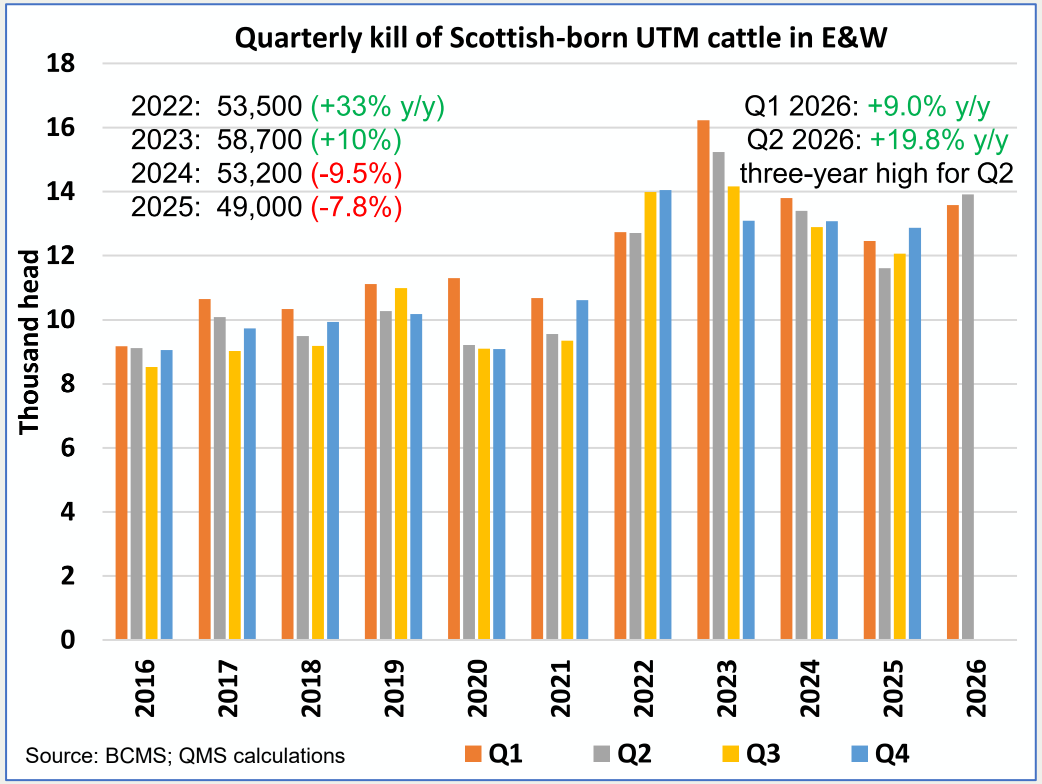


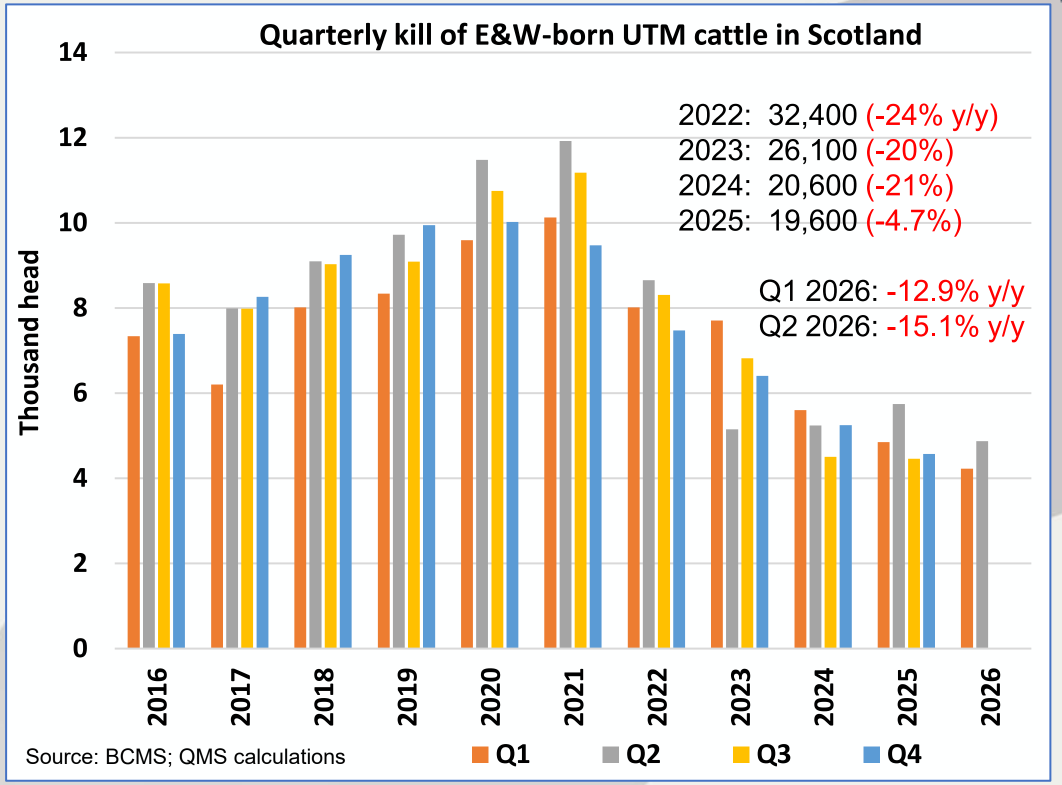
Source: AHDB; ONS; QMS calculations
Note: Scottish farmgate price and UK consumer price index

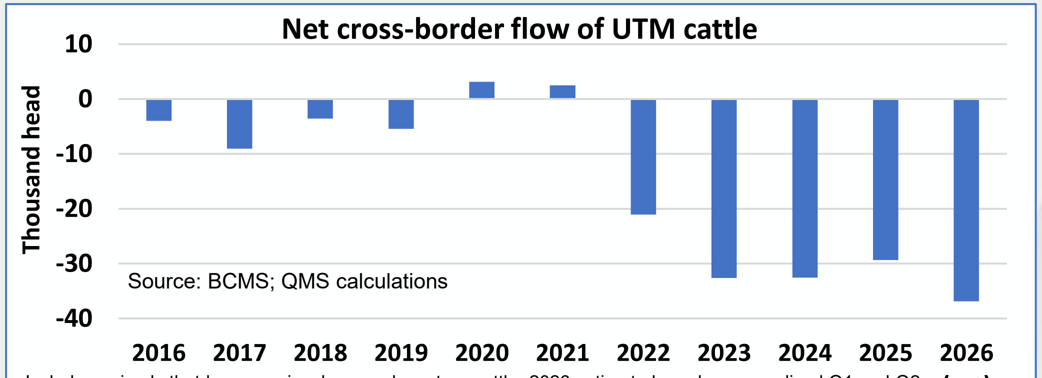
- Underlying consumer demand remains firm, with spending continuing to trend significantly higher.
- However, the share of households buying beef has continued to reduce in this inflationary period.
- The Scottish retail market has been outperforming GB in 2026.
- The annual rate of price inflation is now slowing as the comparison period is picking up the start of last year's price surge.
- Convergence of farmgate and retail prices on a 2020 = 100 index, has allowed more scope for promotional activity this summer.
- Category data suggests that steaks have done well but mince has struggled, reflecting a hot summer in England.

Source of retail data: Worldpanel by Numerator UK; data covers sales of fresh and frozen unprocessed red meat; please note that sales data for Scotland can be volatile due to the limited sample size
*Penetration % - Number of households/individuals that bought at least once in the time period as a percentage of total households/individuals.
**Frequency - Average number of purchase trips per buyer in the time period.

Cross-border kill of cattle aged under 30 months – reduced inflow and higher outflow on course to lower the UTM kill at Scottish abattoirs by more than 2% this year



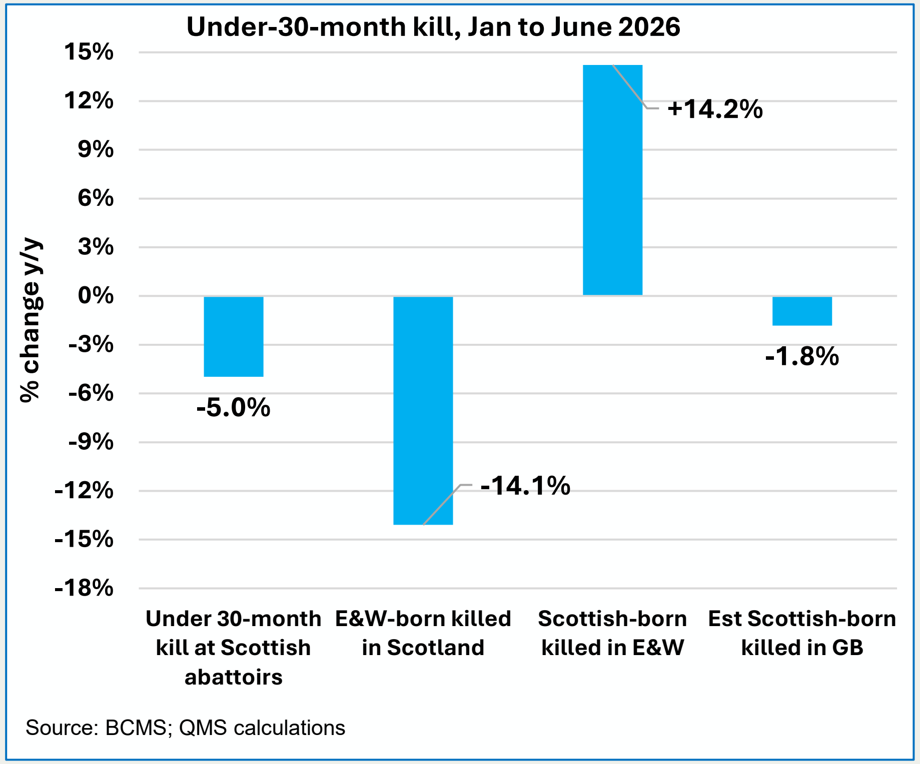


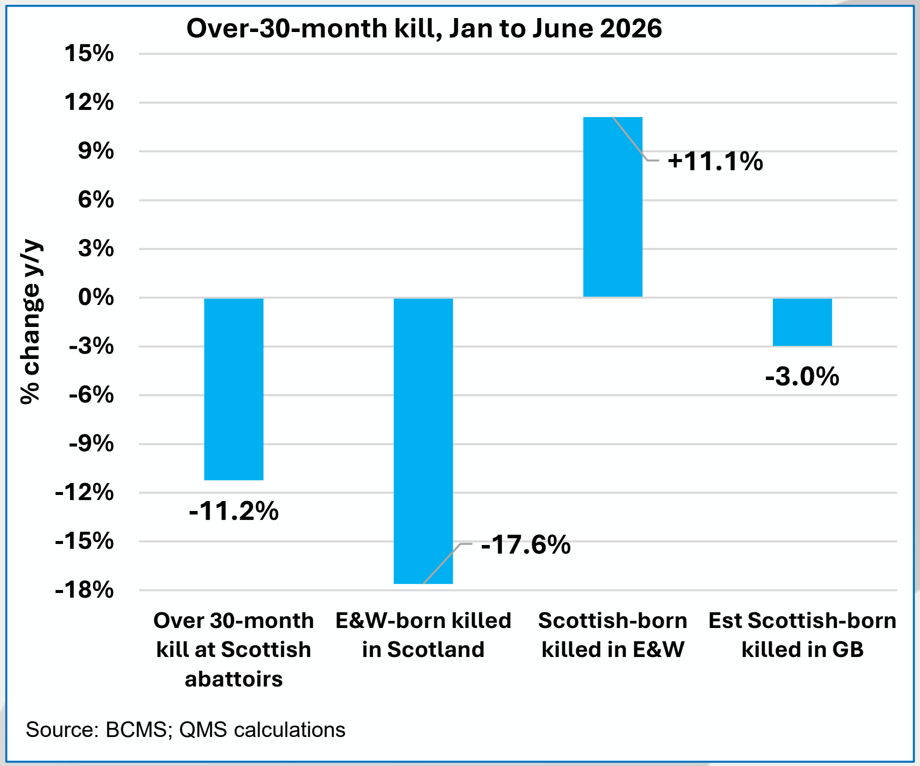


Includes animals that have previously moved as store cattle; 2026 estimate based on annualised Q1 and Q2 movements, where annual totals are based on the 2021-25 average share of annual inflow and outflow taking place in Q1 and Q2

- Slaughter of Scottish-born cattle at under 30 months in England & Wales rebounded strongly at the start of 2026, lifting 9% from Q1 2025 levels. This was followed by an even stronger uplift in Q2, giving a 14% rise in the first half. In Q2, numbers were still 9% below the Q2 peak from 2023, but 43% above the 2017-21 average.
- Slaughter of E&W-born cattle in Scotland had shown signs of steadying in 2025 after three years of considerable decline, but there was a stronger decline again in Q4, followed by a further significant reduction at the start of 2026, with numbers down 14% in the first half of the year. Less than a quarter of cross-border slaughter came from direct movements into Scotland in June 2026.
- The net impact in 2025 had been slightly positive for slaughter numbers in 2025, at +3,200 head, equivalent to 1% of the 2024 UTM kill in Scotland, but we are on course for a tightening effect of around 7,000 head in 2026, equivalent to 2.4% of the 2025 UTM kill at Scottish abattoirs.
- While lower moves to English farms and auctions in the second half of 2025 signalled that a widening of the outflow was unlikely, the uplift in outflow has been driven by a jump in direct-to-slaughter moves (see page 8). Direct moves were around 30% of cross-border slaughter in June 2026.

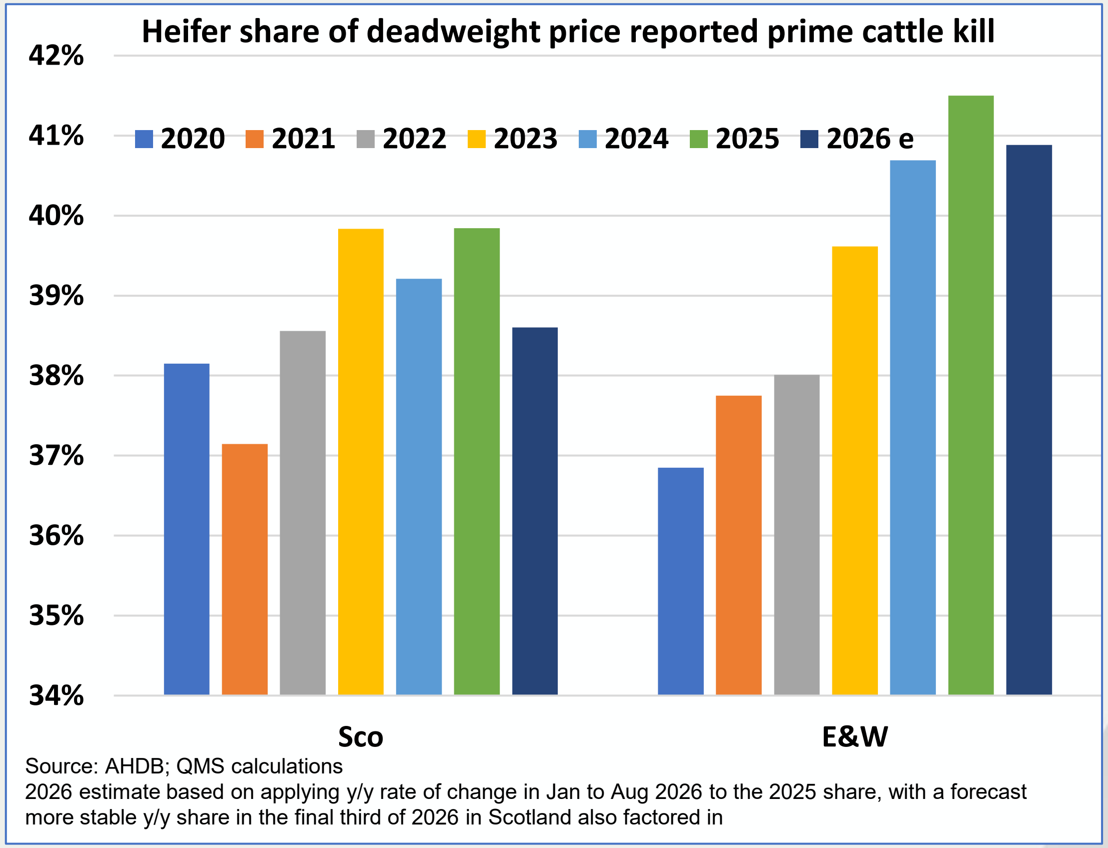
Higher net outflow has had more of an impact on kill than number of Scottish-born cattle going to slaughter

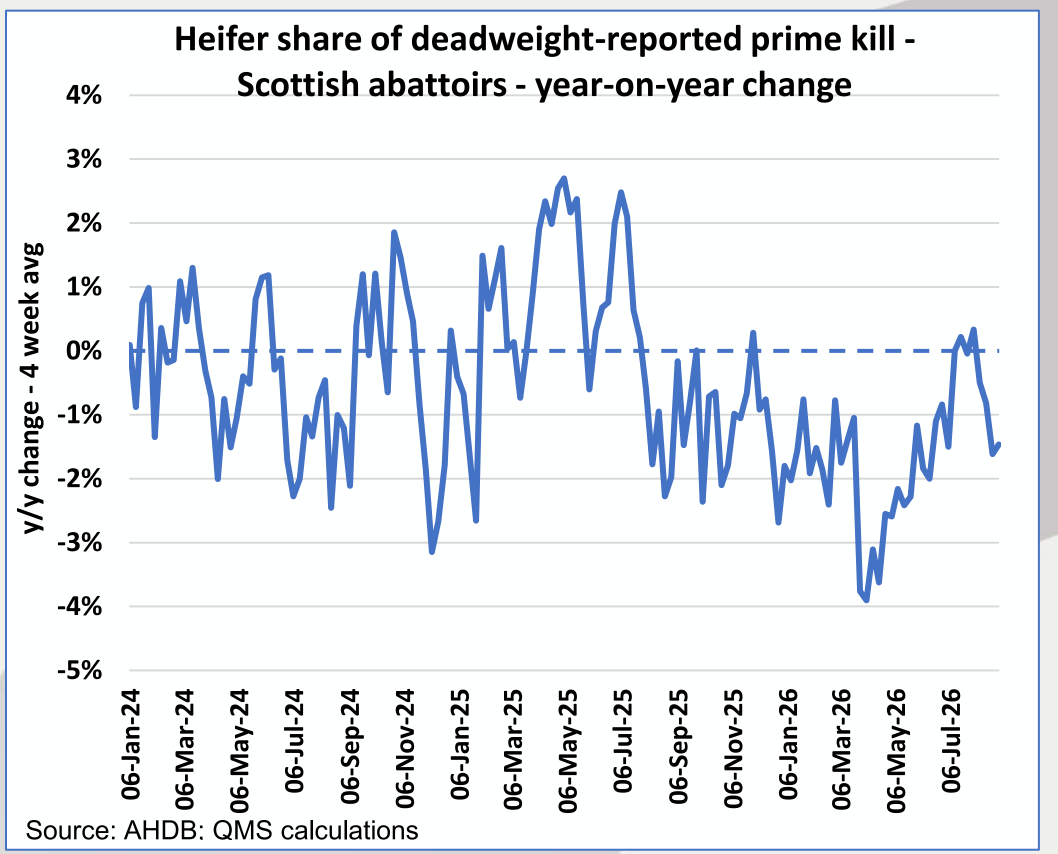




- Less than half of the decline in under-30-month kill at Scottish abattoirs down to the decline in numbers going to slaughter
- Less than a third of the decline in over-30-month kill at Scottish abattoirs down to the decline in numbers going to slaughter
- 2% decline in under-30 month and 3% decline for over-30 months points to lower slaughter rates, influenced by trend towards herd stabilisation as well as sluggish volume of demand and heavier carcase weights

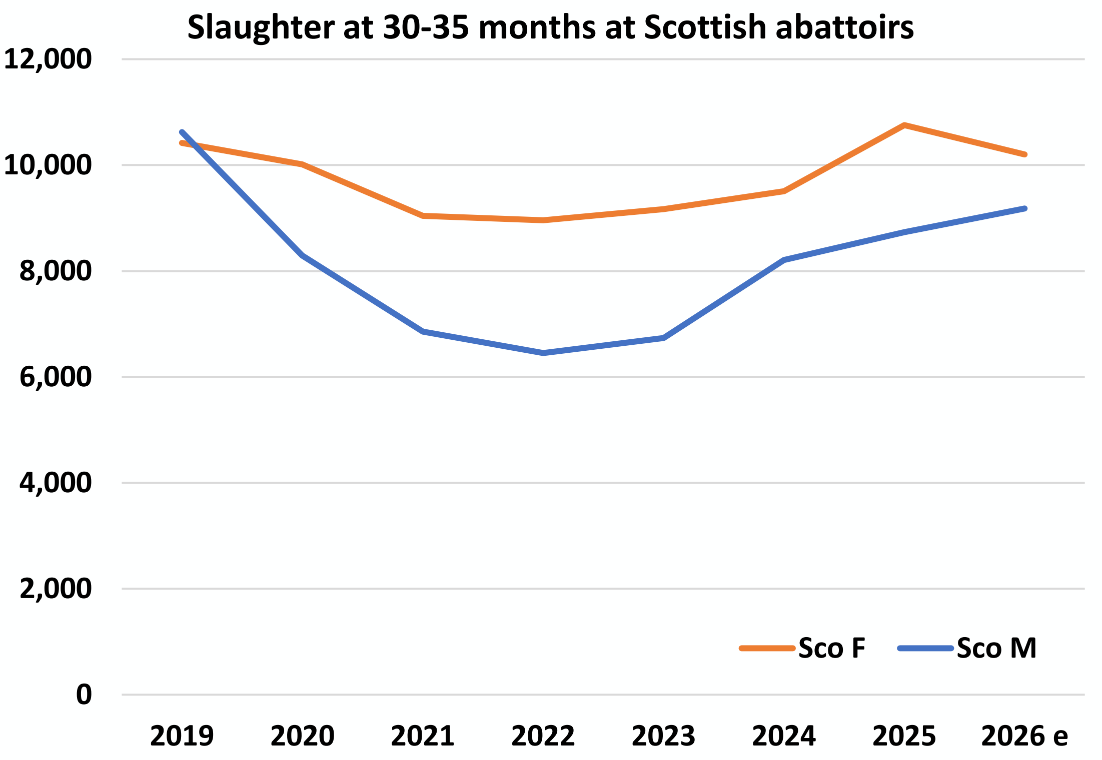
Heifers underpinning slaughter in the short-term



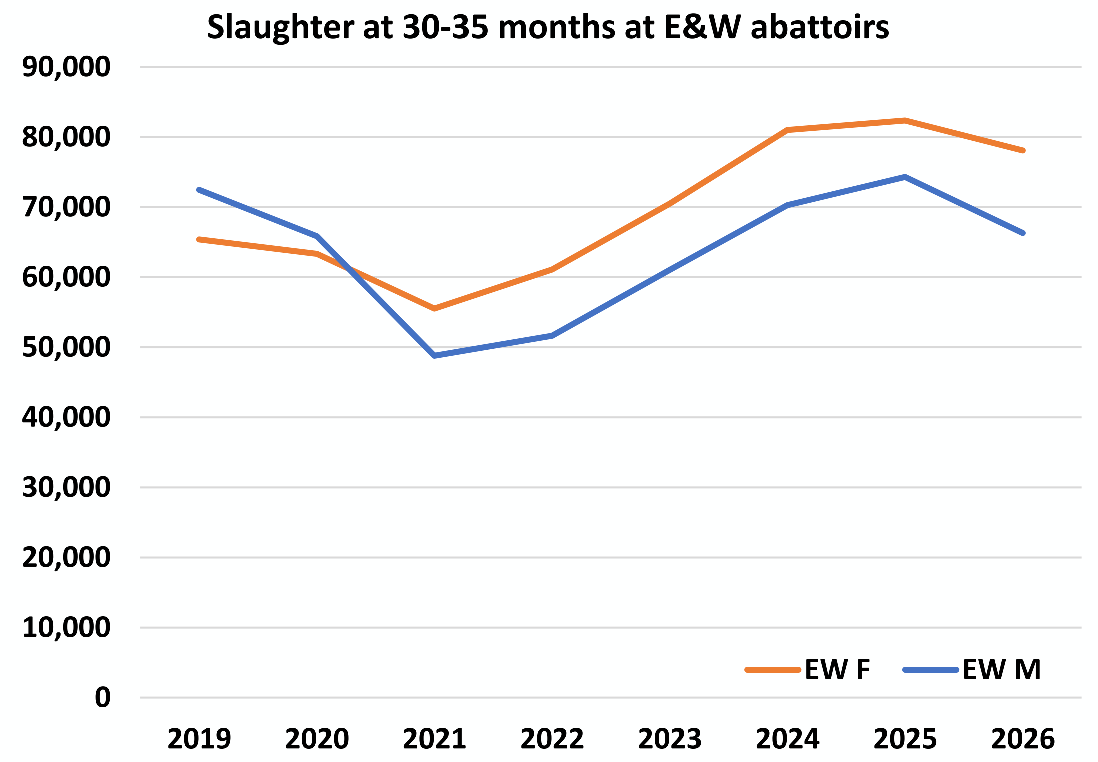


- Elevated heifer kills have been supporting slaughter in recent years while limiting herd size
- Is part of the upwards trend a reflection of more beef-sired dairy heifers in the system as a result of the increased uptake of sexed semen?
- Contradiction between elevated heifer kill and low overall slaughter rate in 2025 (also the case in 2023), but a low male kill in 2025 could translate into a higher male kill in 2026
- Consistently lower heifer share of slaughter in the price reporting sample in Scotland since August 2025, which has been sustained in 2026 in Scotland, could signal a stronger move towards herd stability, but less evidence of this in E&W.
- Last year’s lower level to compare against in the second half could see the year-on-year comparison trend back towards zero without signalling a move away from rebuilding

Older prime cattle supported slaughter from 2023 to 2025, but numbers have fallen in 2026, reflecting lower calf registrations in 2023



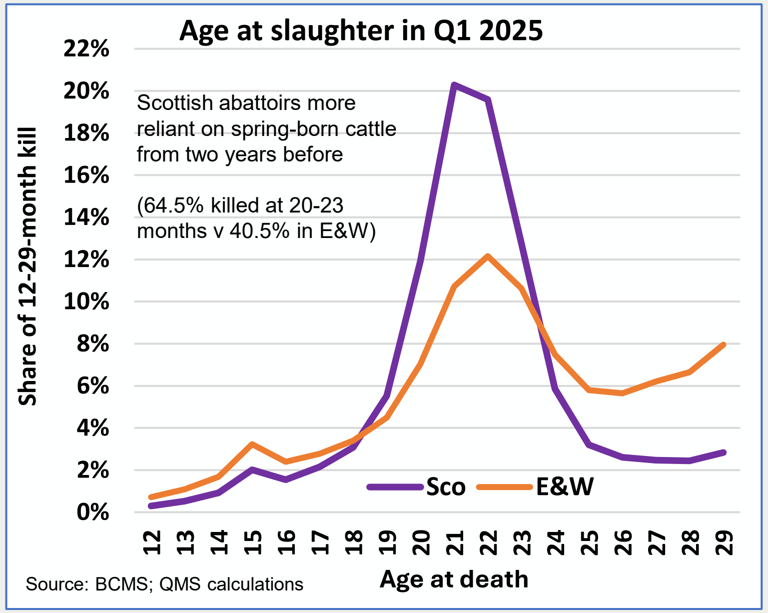
Source: BCMS
QMS estimate for 2026 based on y/y change in Jan to July

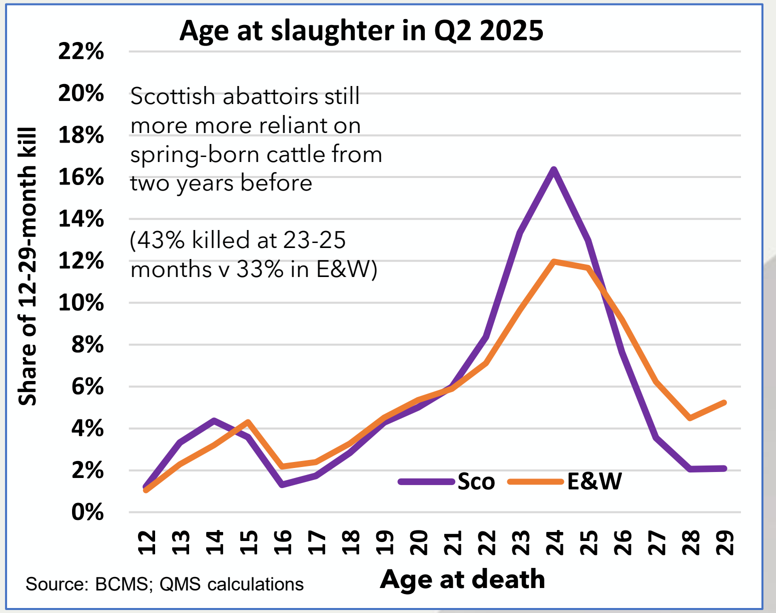


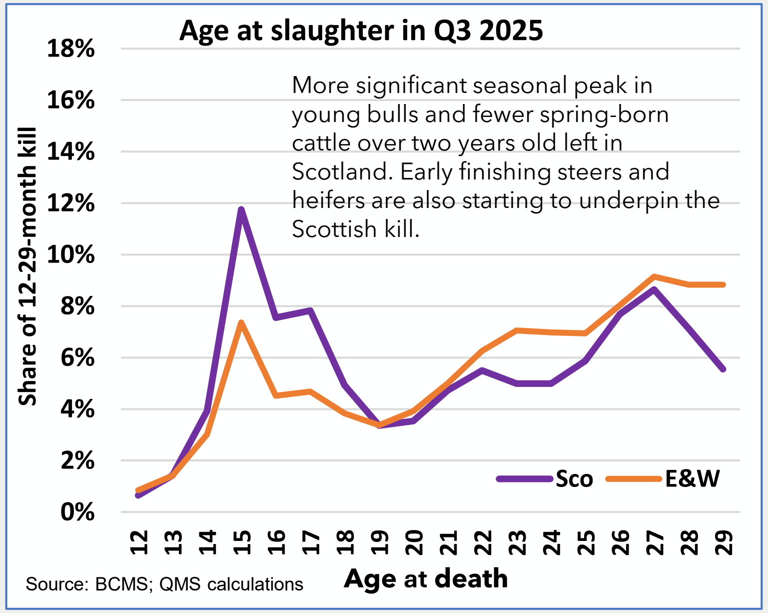
Source: BCMS
QMS estimate for 2026 based on y/y change in Jan to July

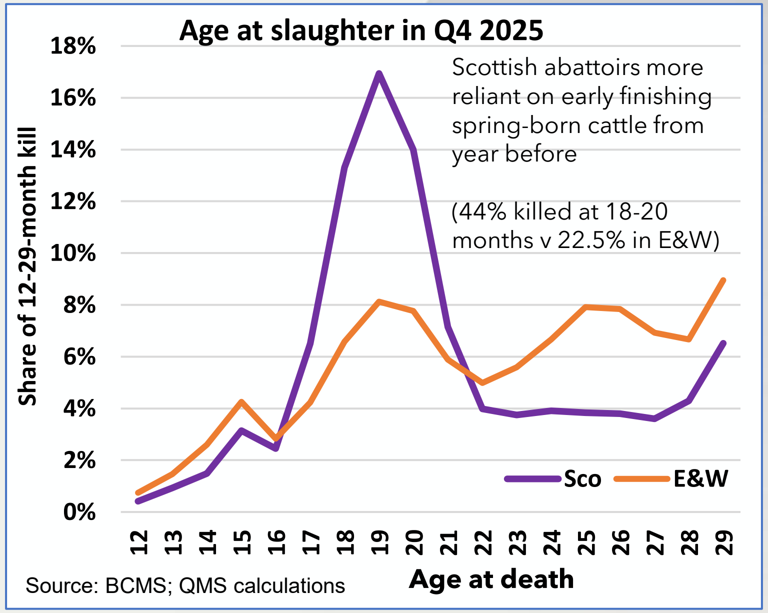
- The stronger rise in the male kill in this age group since 2022 indicates that the increase has been in prime cattle rather than down to slaughter of cows at younger ages, but there was a shift towards females in 2025.
- A further increase in 2025 reflected a higher population on farm at the start of the year in Scotland, although numbers did then tighten in the second half
- Slaughter has fallen back this year in line with tighter supplies of older prime cattle, in turn reflecting lower calf registrations in 2023, though more older males have been processed in Scotland in 2026

Seasonality of prime cattle production







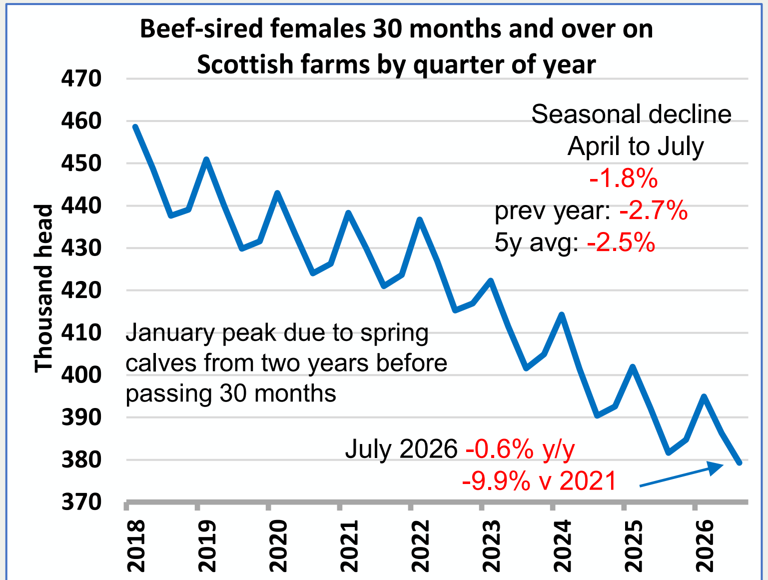


The dominance of spring calving in Scotland and a peak slaughter age at just under two years old means that availability of prime cattle is at its highest of the year in Scotland in the first half. A peak slaughter age of 21-22 months combined with an April high for calvings points to peak supply in January and February.

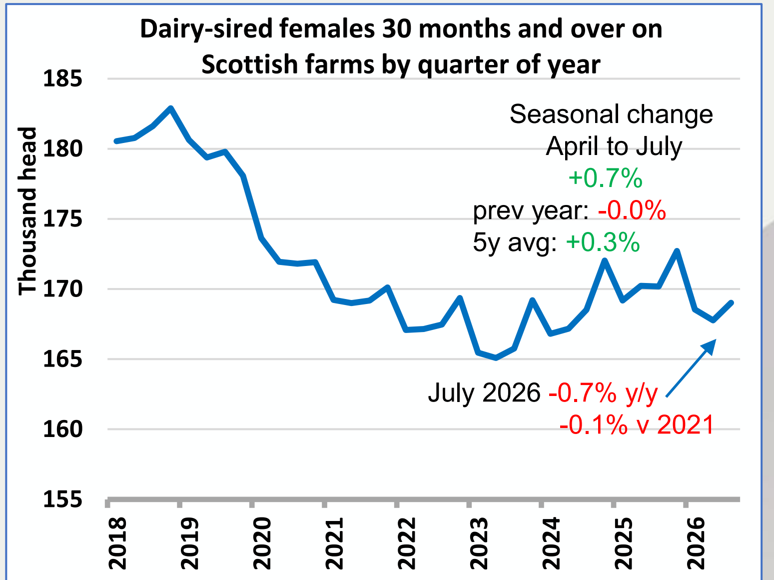
However, supply briefly rebounds in May and June following turnout, before slowing down in the summer, partially offset by the arrival of the young bulls from the previous year's spring calf crop.

After a weak third quarter, slaughter builds again towards the year-end as the early finishing spring-born cattle come on stream in more significant numbers at around 18 months of age.

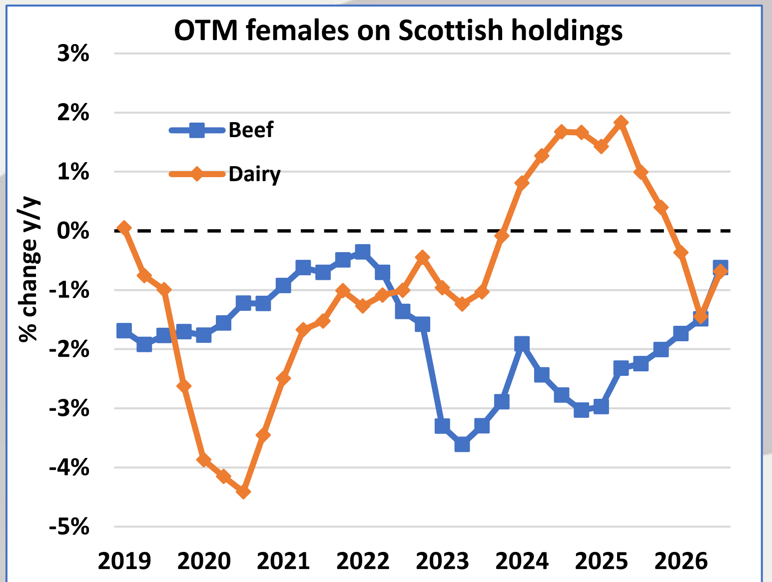
Longer-term supplies outlook - beef herd has continued to move towards stability while dairy herd contraction slowed between spring and summer



Source: BCMS; QMS calculations



Source: BCMS; QMS calculations



Source: BCMS; QMS calculations

Note: Data in charts up to July 2026; beef-sired figures are all non-dairy breeds

In July 2026, there were 379,300 beef-sired females aged 30 months and over on Scottish holdings. This was a 0.6% decline from a year earlier, which was the smallest reduction seen since January 2022, just before the herd began to move into its major contraction cycle. Numbers were down 10% on five years before and by 13% on mid-2018. ScotEID data for early-September 2026 points to a further softening of the decline, with numbers down only 0.3% year-on-year (-0.2% for beef-sires but -0.3% for all non-dairy breeds).

After three consecutive quarters with the seasonal change being modestly on the positive side of the five-year average, there was a more significant improvement, almost a full percentage point slower than a year earlier and 0.7pp better than the five-year average.

Looking ahead, if seasonal changes were to continue exceeding their five-year average by 0.7 percentage points, the year-on-year rate of change in the herd would shift into to slight growth in 2027, up 0.3% year-on-year in January followed by 0.7% uplifts in April and July. One factor which had been limiting the slowdown in herd decline had been a reduced population of beef-sired females aged 24-30 months, but they reversed into growth in April 2026 after three quarters of year-on-year decline, with the increase approaching 5% in July.

With the breeding herd contracting sharply between 2022 and 2025, productivity gains have been limiting the decline in prime cattle production. These gains have been supported by the culling of the least productive cows in recent years and the additional beef-sired calves produced by growth in the dairy herd in 2024 and 2025. Increased calf registrations in 2026 (see page 8) point to continuing productivity improvements, while the rebound in the dairy herd between spring and summer suggests that the period of dairy sector contraction was shorter and more limited than had been anticipated.

While also softening, the year-on-year decline in the suckler herd in England & Wales has continued to outpace the decline in Scotland, with 1.6% reduction in beef-sired females over 30 months in July. Meanwhile, dairy herd contraction remained elevated.

Females aged 30 months+ on farms (y/y change in July 2026)

Month	Dairy	Beef	All
Sco	-0.7%	-0.6%	-0.6%
E&W	-2.4%	-1.6%	-2.1%
GB	-2.2%	-1.3%	-1.8%

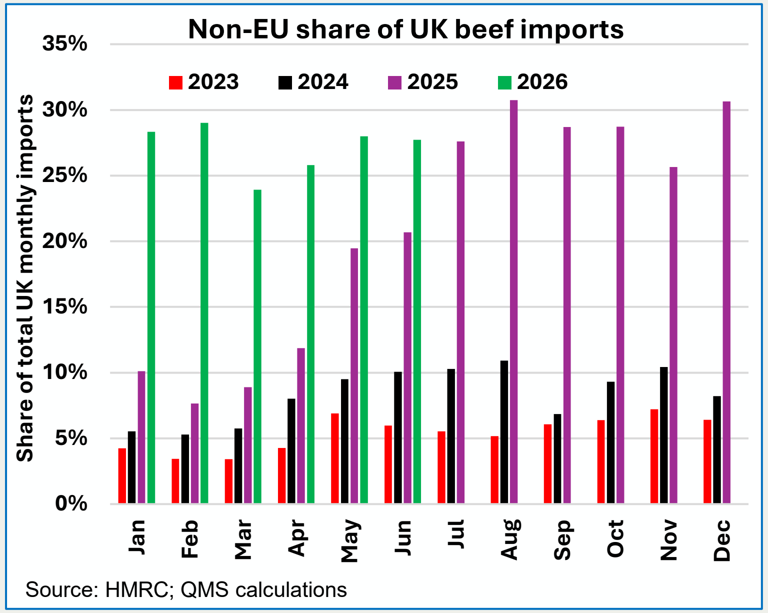
Source: BCMS; QMS calculations

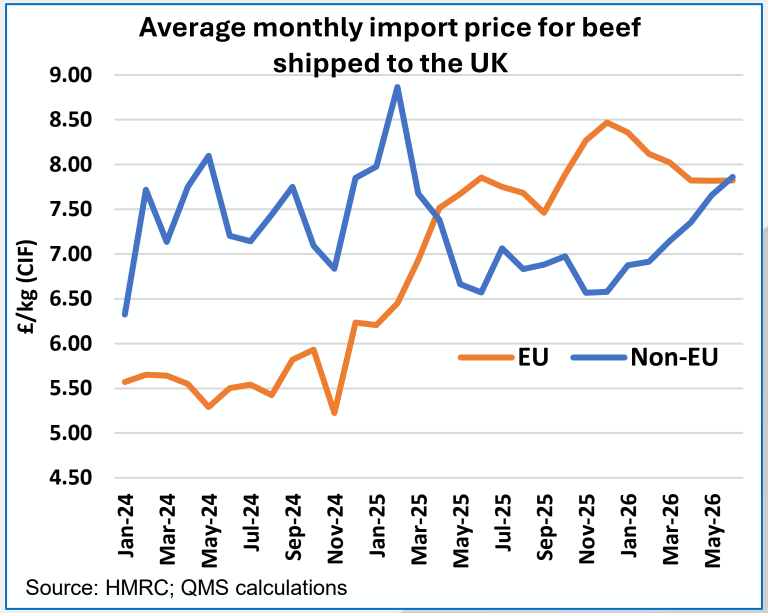
Females over 2 years that have calved (y/y change, Dec 2025)

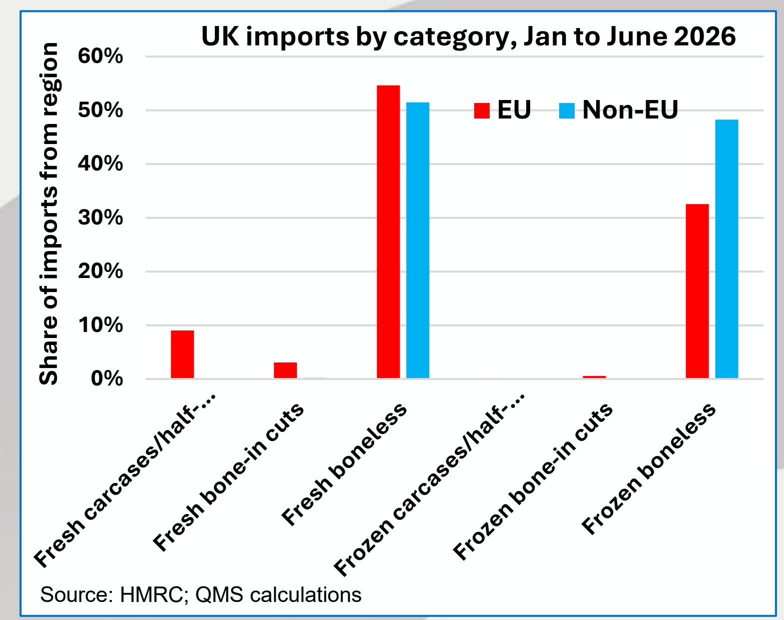
	Dairy	Beef	All
Scotland	+0.4%	-1.4%	-0.8%
England	-0.9%	-3.5%	-1.8%
Wales (June 2025)	+1.1%	-5.0%	-1.1%

Source: Defra; Scottish Government; QMS calculations

Imports - switch towards price competitive non-EU beef







Non-EU imports have traditionally been higher value cuts for the foodservice sector at highly competitive prices, but there was some coverage in UK retail in 2025. The level of trade suggests that a significant quantity will have been imported having paid the full UK tariff (12% + £2.54/kg for boneless beef), particularly product from Brazil, which has more limited access to UK quotas than Australia and New Zealand, and where cattle prices are lower.

Non-EU import penetration appears to have steadied at close to 30% of UK beef imports, averaging 5,700t per month between July 2025 and June 2026. It will be interesting to see if a softening of EU beef prices and higher slaughter in the Irish Republic leads to any shift back towards EU beef. Non-EU imports reached 50,800t in 2025, up from 20,100t in 2024 and 12,200t in 2023. In the first half of 2026, they totalled 33,000t, more than doubling year-on-year but down 5% when compared to the second half of 2025 (34,800t).

There was an interesting reduction in the average price of non-EU imports as volumes initially increased, potentially signalling a shift in the balance of cuts/ market outlets, especially as farmgate prices rose in 2025 in Australia, NZ, Brazil and Uruguay. However, this has reversed in 2026, with non-EU beef trending significantly higher in price and converging on EU levels.

Imports from Australia, Ireland and Poland tend to be fresh boneless cuts whereas imports from Brazil and New Zealand tend to be frozen boneless product, but UK trade data only goes down to the eight-digit level, preventing a more detailed analysis of the types of cuts imported.

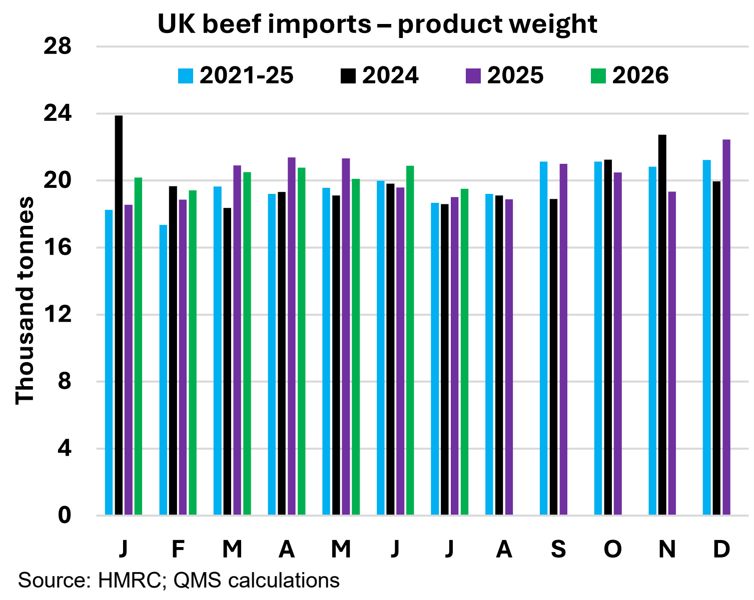
Average UK import prices from selected suppliers, January to June 2026, £/kg CIF

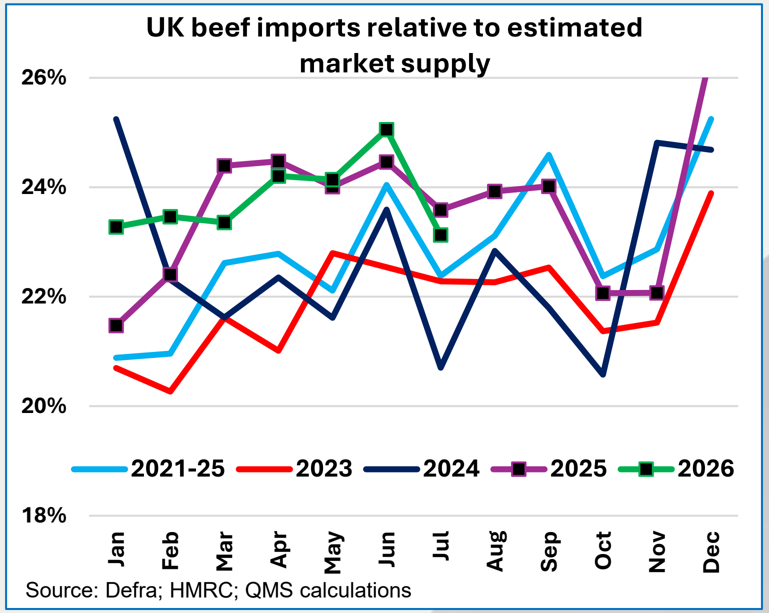
Supplier	Average price, fresh beef	Average price, frozen beef	Overall average
Irish Republic	8.35	7.36	8.04
Poland	8.92	5.93	7.87
Australia	8.98	5.22	8.52
Brazil	7.93	5.06	5.69
New Zealand	8.14	5.65	6.59
Uruguay	11.40	6.79	9.01

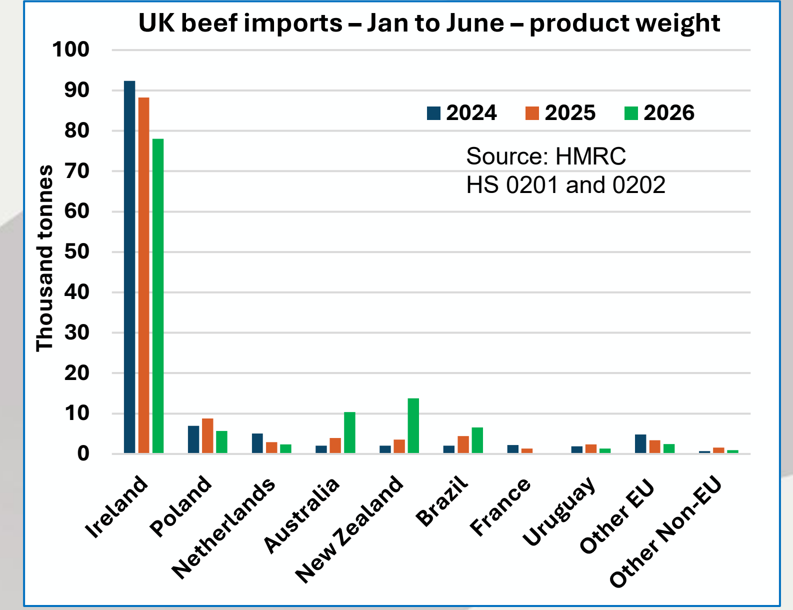
Source: HMRC; QMS calculations

Note: beef trade data based on HS 0201 and 0202

International Trade – UK import volumes







UK beef imports by country – January to June (tonnes)

	2024	2025	2026
Irish Republic	92,348	88,276	78,068
New Zealand	2,017	3,557	13,765
Australia	2,064	3,993	10,391
Brazil	2,085	4,444	6,580
Poland	6,953	8,810	5,712
Netherlands	5,044	2,924	2,353
Uruguay	1,896	2,375	1,377
Spain	1,101	1,161	835
Italy	570	788	829
Belgium	928	817	430
Others	5,150	3,537	1,512
Overall total	120,157	120,683	121,854

Source: HMRC; QMS calculations
Top-ten suppliers based on January to June 2026

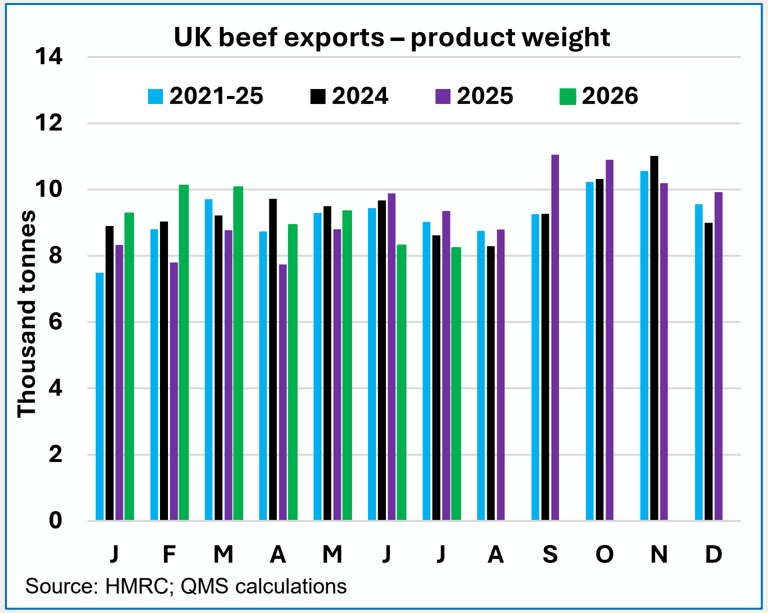
Overall UK beef import volumes remained relatively steady in the first half of 2026, edging nearly 1% higher from the same period of 2025, having been up less than 0.5% year-on-year in the first half of 2025. However, within this headline total, imports from EU sources fell by another 15%, having dropped 6% last year, whereas non-EU beef imports more than doubled, having already lifted more than 80% in the first half of 2025.

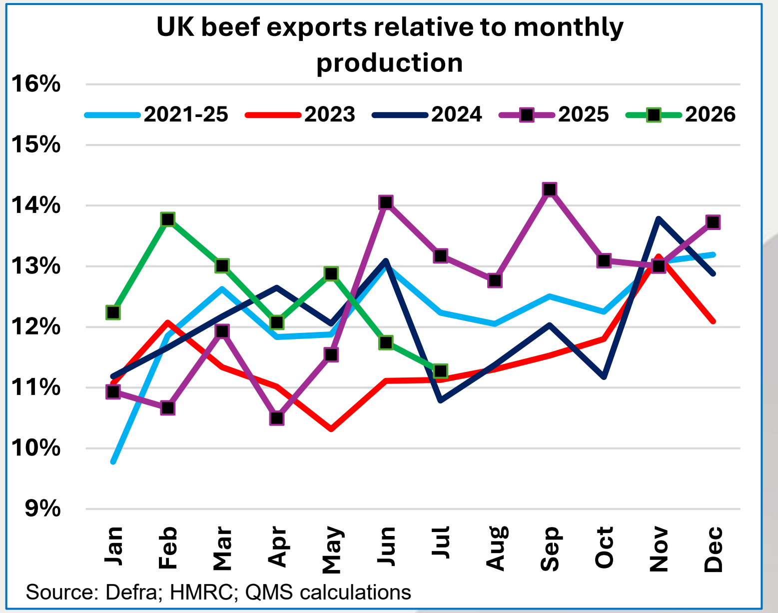
While the Irish Republic is still by far the main supplier, its share dropped to 64% in the first half of 2026 compared to 73% a year earlier and 77% two years before. Meanwhile, New Zealand became the second largest supplier, reaching 11% of the total, up from shares of 2% in 2024 and 3% in 2025. From similar levels to NZ in the first half of 2024 and 2025, there was slower growth from Australia in 2026, though its share still more than doubled to 8.5%. However, having moved ahead of Australia and NZ in the first half of 2025, imports from Brazil fell far behind in the first half of 2026 despite rising nearly 50%. Brazil's share of the total import volume rose from 3.7% to 5.4%. It is likely that more favourable market access for Australia and NZ enabled the further surge in deliveries relative to Brazil, supported by large tariff-free quotas under the Free Trade Agreements that entered force in 2023.

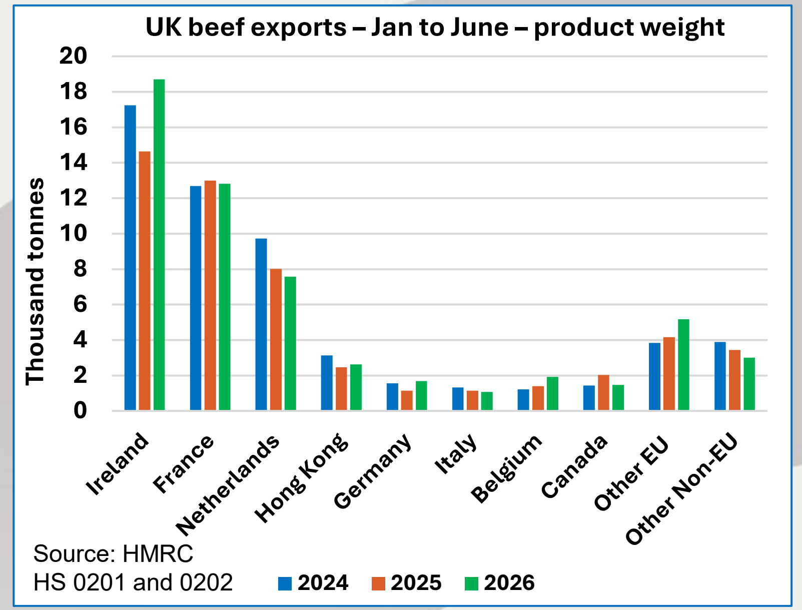
While UK imports have proved relatively stable over the past two years, they have captured a slightly higher share of the UK market.

Note: beef trade data based on HS 0201 and 0202; July trade figures are estimates based on historic seasonal trends

International Trade – UK export volumes







Note: beef trade data based on HS 0201 and 0202

UK beef exports by country – January to June (tonnes)			
	2024	2025	2026
Ireland	17,243	14,632	18,703
France	12,679	12,997	12,808
Netherlands	9,733	8,015	7,576
Hong Kong	3,132	2,466	2,618
Belgium	1,218	1,395	1,917
Spain	945	1,411	1,836
Germany	1,566	1,153	1,694
Sweden	956	1,060	1,635
Canada	1,430	2,032	1,469
Italy	1,329	1,140	1,079
Others	5,819	5,127	4,708
Overall total	56,051	51,427	56,043
Source: HMRC; QMS calculations			

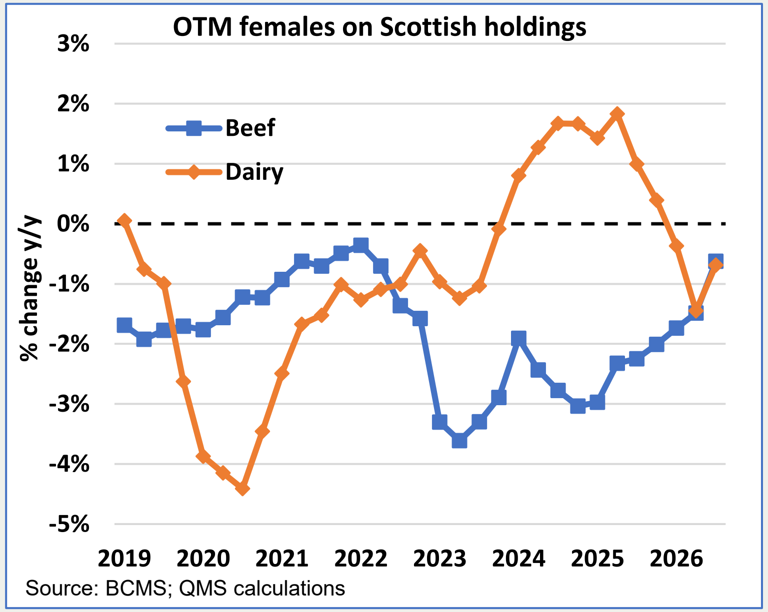
UK beef exports subtract supply from the domestic market and their monthly pattern for much of 2025 and 2026 reflected the general strength of the market in reverse, being weak in the opening five months of 2025, when the domestic market was extremely tight, before rebounding strongly as the volume of demand softened following the spring price surge. Exports continued to show strength for much of the first half of 2026 before falling back in June, and it will be interesting to observe whether exports continued to run lower in July and August given the tighter domestic market conditions. Exports also mirrored the supply-side picture in the main export destination of the Irish Republic, so a rebound in Irish supplies in the second half of 2026 could also restrict UK export volumes.

Over the first half of 2026, exports rebounded by 9%, effectively matching the level of January to June 2024. EU countries drove the increase, lifting more than 12.5% whereas non-EU trade contracted by more than 10%.

The Irish Republic increased its position as the main export destination in the first half of 2026, accounting for a third of the total, up from 28.5% a year earlier, as sales jumped by close to 30%. By contrast, shipments to France dipped 1.5% and its share slipped more than two percentage points, falling below 23%. It was a similar case for the Netherlands, with a 5.5% decline in shipments and a two-point reduction in share, down to 13.5%.

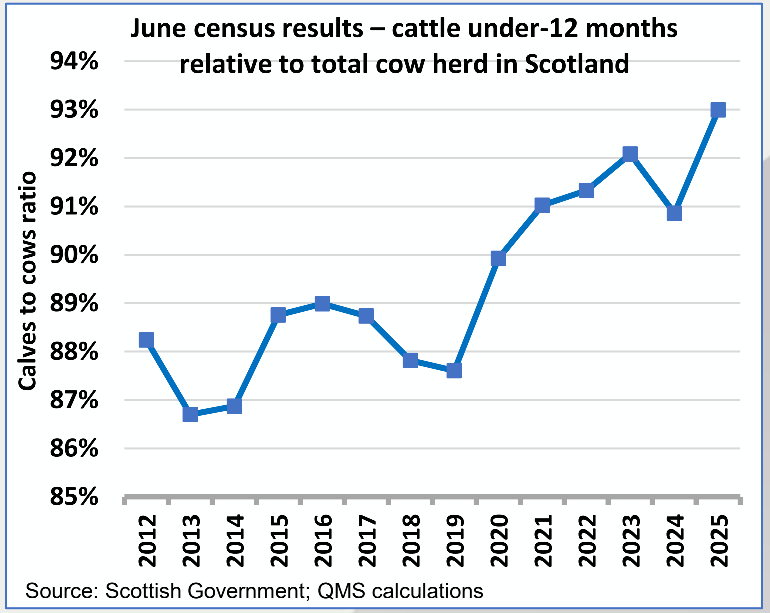
Meating Our Potential Indicators

Breeding Herd



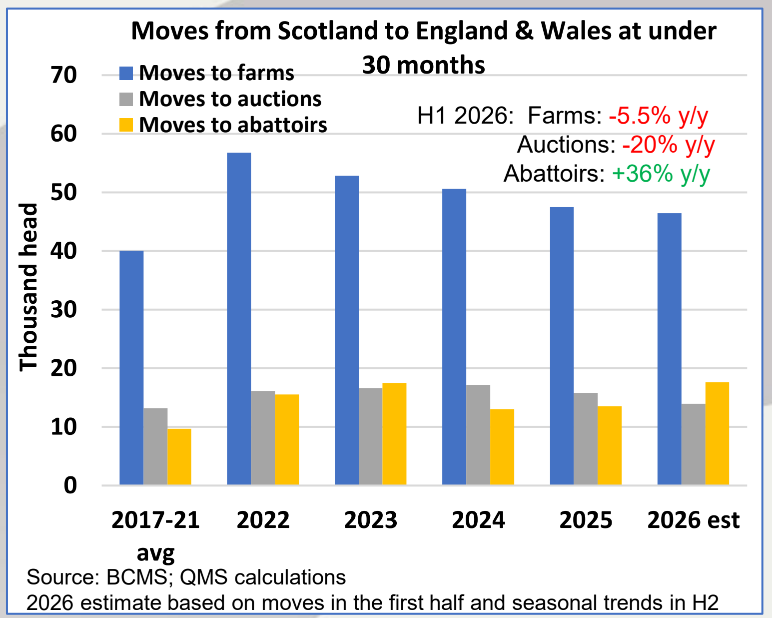
Beef herd decline has slowed further, with July's year-on-year reduction at its softest since the start of 2022. Signs of further improvement in ScotEID population data as of early-September (-0.3% y/y). Slowdown in dairy sector contraction also more positive for future supplies than had been expected.

Productivity



Calf numbers relative to beef and dairy cows in the June census jumped higher in 2025, reflecting lower mortality due to good spring weather. Calf registrations relative to cows also rebounded, reaching a new high of 96.8% in 2025 (96.5% in 2024). Calf registrations have increased significantly in 2026 against the continuing decline in cow numbers, suggesting further productivity growth.

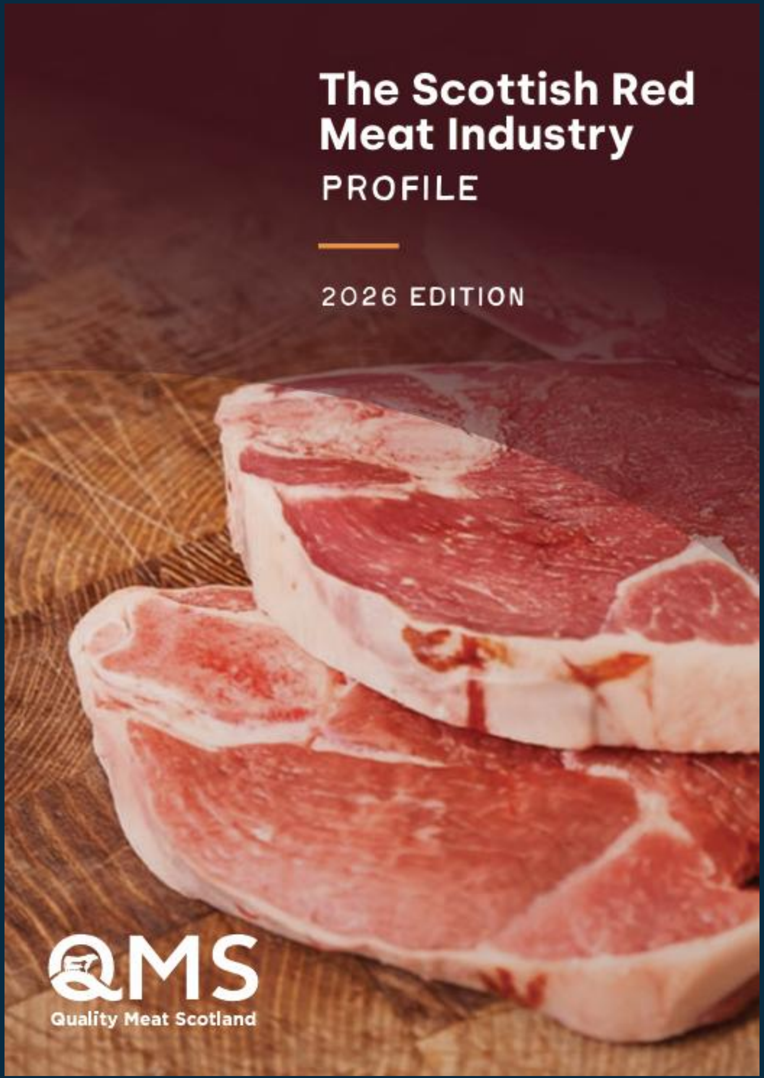
Outflow



Note: some moves to farms are effectively slaughter moves, with the cattle being processed shortly after arrival in England

The level of store cattle outflow to England & Wales has slowed further in the first half of 2026, although it does remain elevated above pre-2022 levels and direct moves to slaughter have increased significantly since September 2025.

Click to view our latest version of our annual Red Meat Industry Profile



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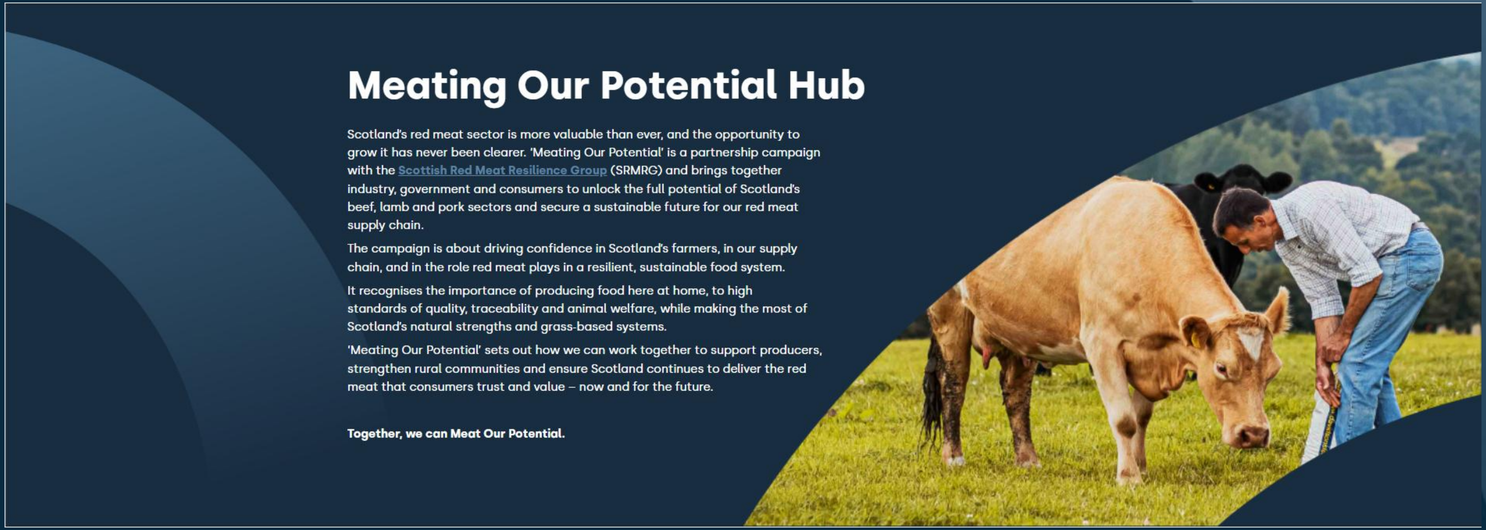

QMS

Quality Meat Scotland