The meat of the matter:

what does the trend in lower meat consumption mean for UK livestock farmers?

Technical paper

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This paper presents the details of our research and analysis, summarised in our policy insight *The meat of the matter: what does the trend in lower meat consumption mean for UK livestock farmers?* (January 2026)

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Green Alliance
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Summary

Reducing how much meat people eat in the UK is recommended for health and sustainability reasons. Long term declines in red and processed meat consumption are positive, yet further dietary shifts are recommended by the NHS to meet its health recommendations., It is also needed to meet the UK's legally binding climate targets.

Agriculture contributes around £14 billion to UK gross value added (GVA) and supports about 1.4 per cent of the workforce.[1] Yet primary production is not always profitable: upland and lowland livestock grazing farms, as well as some farms growing livestock feed, often rely on government schemes to remain profitable. This is because many farmers are under pressure from a combination of rising input costs and the growing impacts of climate change induced extreme weather.[2] [3]

Agriculture is a driver of climate change, accounting for 12 per cent of the UK's total greenhouse gas emissions.[4] While, efficiency gains, such as selective breeding or better animal management, can improve productivity, the Climate Change Committee (CCC) recommends reducing overall livestock numbers to align with goals to tackle climate change.

These pressures raise important questions about how dietary change interacts with farming livelihoods. We have studied 20 years of data and found that substantial decreases in meat eating have not driven reductions in meat production. Despite this, English livestock grazing farms (which mainly produce beef and lamb) are struggling to make a profit more than any other farm type.

We found that support via England's Environmental Land Management (ELM) schemes will have far greater impact on the profitability of these farms than further reduction in the demand for meat. In fact, reducing meat production to make space for other activities could help these farms become more profitable, driven by farming policy rewarding public goods. However, the profitability of pork and chicken farms is not dependent on government schemes, which means different interventions to reduce their environmental footprint will be needed.

Our recommendations, based on our analysis, are directed at supporting farmers' livelihoods, the health of the nation and the UK's environmental goals. We conclude that the government should:

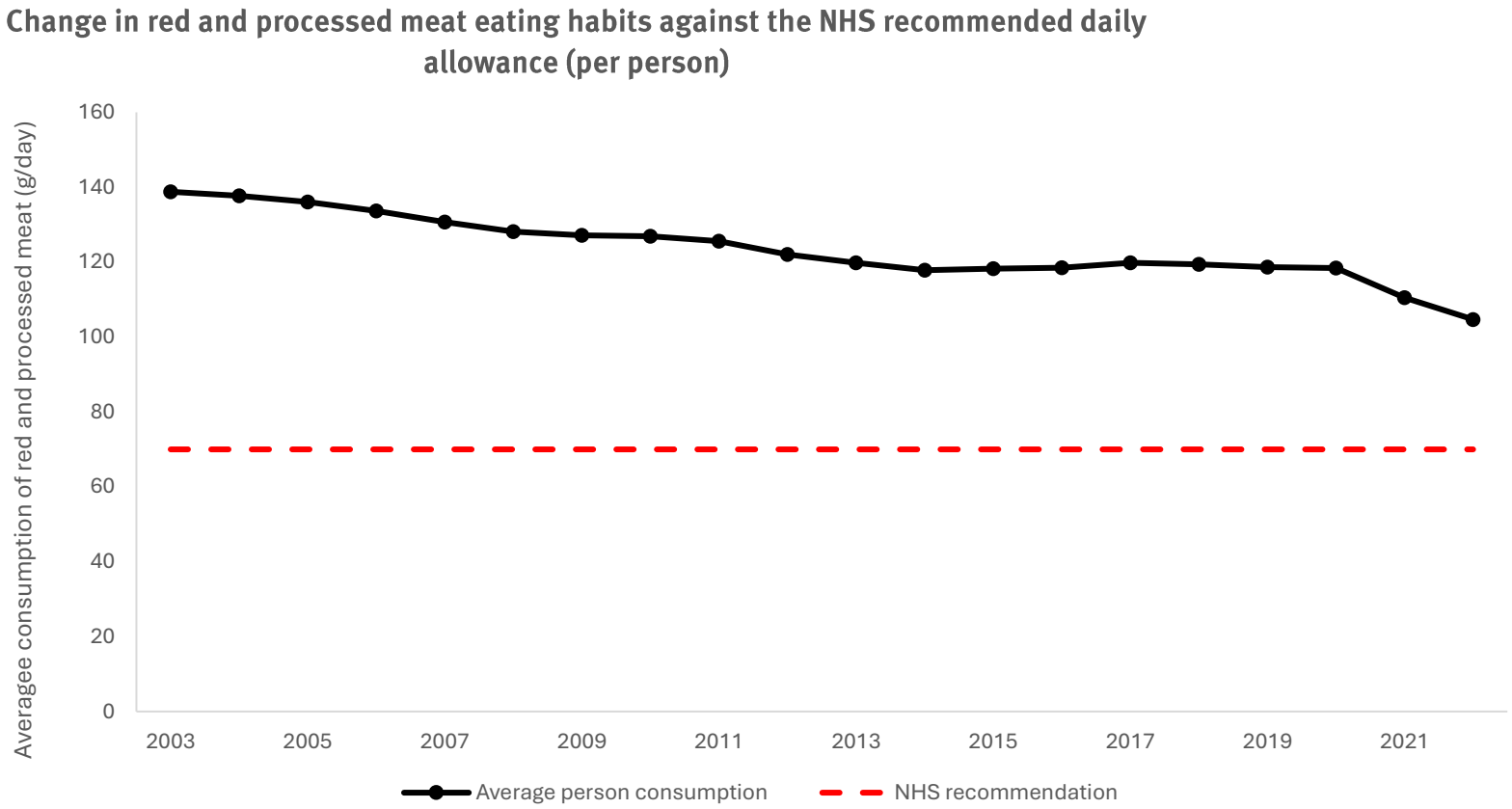
- **Build on public momentum and use the government's food strategy to reduce meat consumption to healthy and sustainable levels**
  The modest reductions in the amount of meat people eat, already occurring, are unlikely to dramatically threaten overall farm profitability in the short term. The government's food strategy should give people better access to affordable plant-rich diets to enable meat consumption to continue to fall for the benefit of health and sustainability. Ensuring consumption falls faster than domestic production is crucial to prevent offshoring environmental impacts through greater reliance on imports.
- **Develop ELM schemes to create more business opportunities for grazing livestock farmers**
  Given the profitability of many livestock farms depends on opportunities under ELM, significant expansion of the Landscape Recovery and Higher Tier schemes is needed as they are better suited to these farm types. This should be set out in the forthcoming 25 Year Farming Roadmap to give farmers confidence in the opportunities available to them.
- **Publish and implement a Land Use Framework as a priority**
  This framework should be used to guide ELM spending towards areas where food production and farm profitability are low and where there is high potential to generate public goods, such as landscape enhancement, habitat restoration and carbon storage. This would drive funding into areas currently dominated by livestock grazing.

Diet change for health and the environment

Reducing meat eating in the UK is good for people's health and the environment. Cutting red and processed meat consumption lowers the risk of cancer and heart disease. It also reduces greenhouse gas emissions produced by livestock, particularly beef and lamb. By shifting towards lower meat, higher plant-based eating, the UK could lead among high income countries in achieving healthier, more sustainable diets.

On average, people in the UK eat more meat than is recommended for both health and sustainability reasons.

Meat can be part of a healthy diet, but the NHS says that people in the UK are eating more than they should which is leading to health risks, for example too much red and processed meat is linked to a greater likelihood of cancer and heart disease.[5,6] Eating less would improve population health and cut NHS costs. It would also enable land use change needed to reverse the serious decline of UK habitats and nature.[7] The NHS Eatwell Guide advises anyone eating over 90g of red or processed meat daily to cut back to 70g.[8] In 2022, the average consumption in the UK was 104.7g per person per day, meaning a 33 per cent reduction would be needed for the average meat eater.



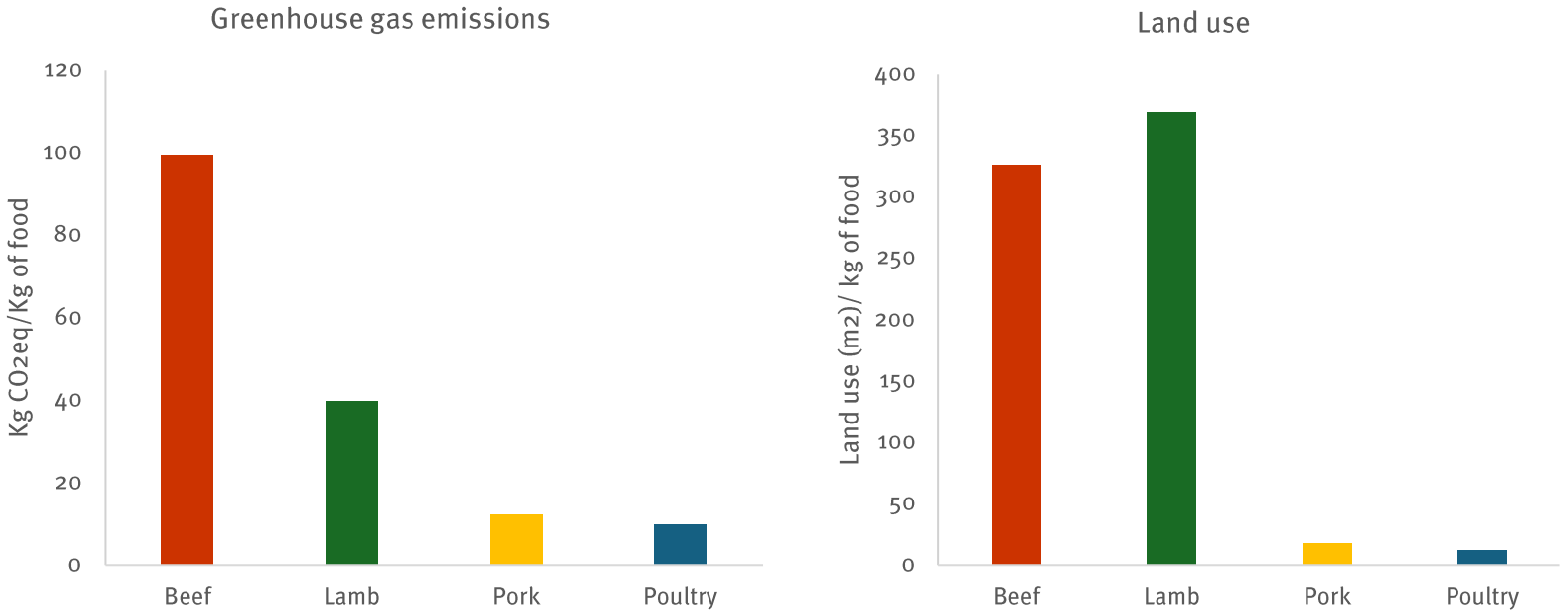
From an environmental perspective, the largest contribution of diet-related greenhouse gas emissions is from animal products.[9] Farming contributes 12 per cent of the UK's total emissions in 2022, with two thirds of that (63 per cent) coming from livestock.[10] Ruminant livestock (cattle and sheep) and animal wastes are a significant source of methane, a potent greenhouse gas.

As well as contributing to climate change, UK farming is increasingly vulnerable to its effects. Extreme weather leading to crop failures is reducing farm incomes, challenging food security and leading to mental health impacts on farmers.[11]

Around 70 per cent of UK land is used for agriculture, with livestock farming and animal feed production accounting for 85 per cent of the area.[12] As pressure grows to use more land for housing, infrastructure and nature restoration, the large land footprint of livestock farming will be hard to maintain.[13,14]

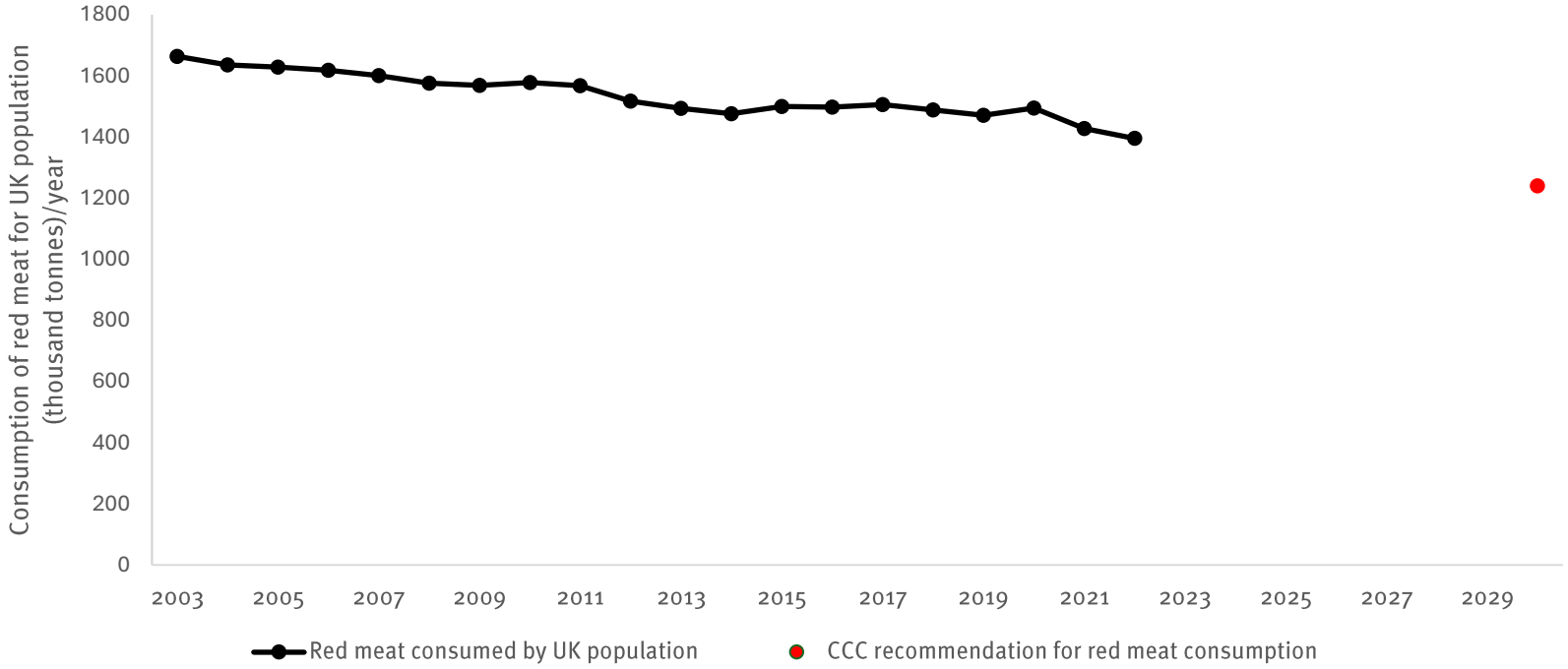
Of all the types of meat, beef has the highest climate impact per kilogram, followed by lamb. Lamb and beef also require much more land than pork or poultry. Although less carbon and land intensive, pig and poultry still have an environmental impact, particularly through water pollution, as has been seen in the Wye Valley.[15] As this report is focused on meat consumption, we do not explore dairy production.

Greenhouse gas emissions and land use impacts from different types of meat production



To meet climate targets recommended by the Climate Change Committee (CCC), UK meat consumption should fall by 11 per cent by 2030 from 2019 levels, with red meat consumption dropping more, by 16 per cent by 2030. Although consumption is declining, it has not yet fallen enough to meet the CCC's recommendation. However, even a small individual reduction, such as eating the equivalent of one less slice of bacon a day, could be enough to create population level shifts to contribute towards sustainability goals.[16]

Change in red meat eating habits against sustainability goals (population level)



UK meat consumption over the past 20 years

The amount of red and processed meat eaten in the UK has declined over the past 20 years. This is positive for the population's health and the environment, as red meat has the highest health risks and climate impacts. Overall meat consumption has also fallen, but is still above levels recommended by the NHS Eatwell Guide, in part due to higher poultry consumption, particularly in the past five years.

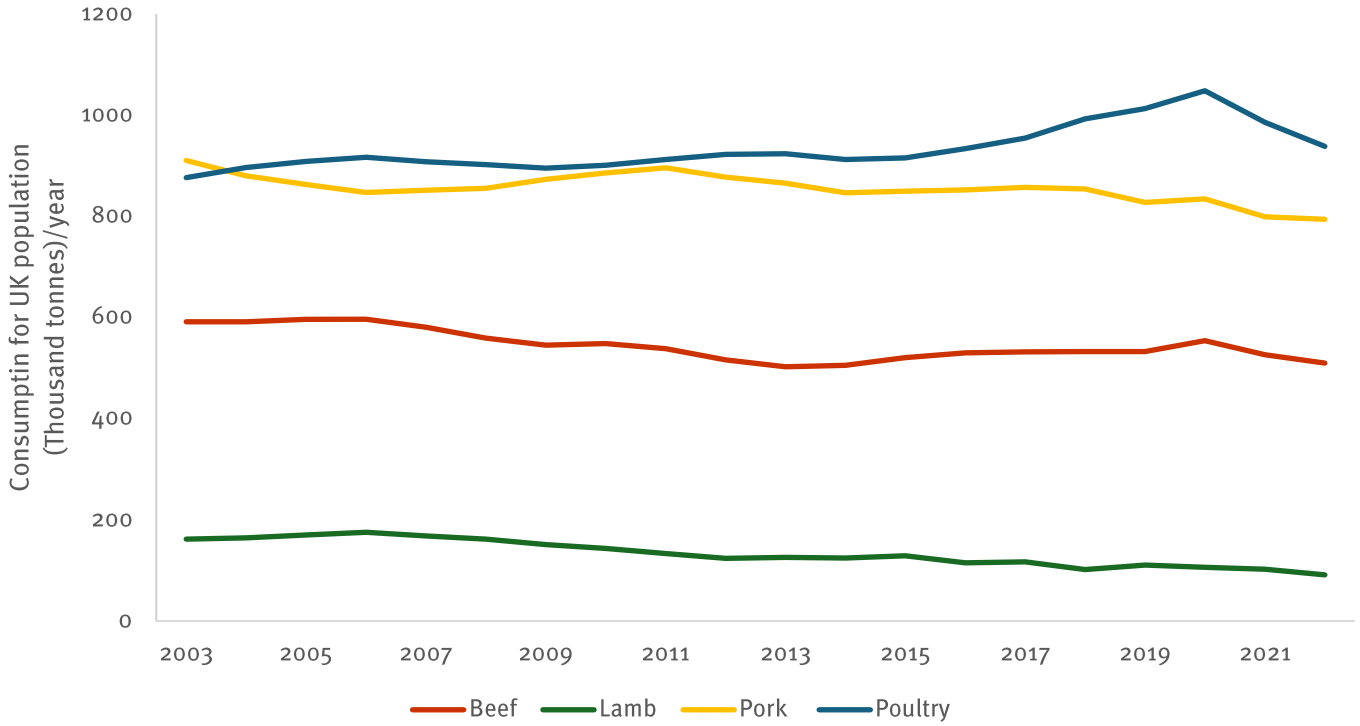
We analysed 20 years of UK meat consumption data (2003–23), using three year rolling average to spot long term trends and smooth out year to year fluctuation.[17] Taking this long term view, and accounting for the UK's 14 per cent population growth over this period, shows how meat eating habits have shifted.[18]

Across the UK, total meat consumption has dropped by eight per cent in the past two decades, despite significant population growth. Lamb consumption has seen the sharpest fall, down 44 per cent since 2003. Beef is down by 14 per cent and pork by 13 per cent. In contrast, poultry consumption has risen seven per cent, making it the most widely consumed meat. Since these figures include population growth, they mask the true scale of the reduction in meat consumption per person.

The pace of change is accelerating. Most reduction occurred during the five years to 2023. This suggests a shift in behaviour that may be linked to cost of living pressures. Affordability is a concern for many households due to food prices rising 30 per cent between 2021 and 2024.[19] Meat products have shown particularly sharp price increases.[20] Consumption of processed meat, the biggest share of meat eaten in the UK, has declined, particularly in the past five years, while the consumption of whole cuts has stayed relatively stable.

Most of the beef, lamb and poultry bought in the UK is domestically produced. There is a more even split for pork, with around half of demand being met by imports. Over the past two decades, pork, beef and lamb imports have generally declined, with lamb showing the steepest fall, down by more than half. The picture is different for poultry where imports have grown almost 40 per cent since 2003.

Change in the consumption of different meats (2003-23, population level)



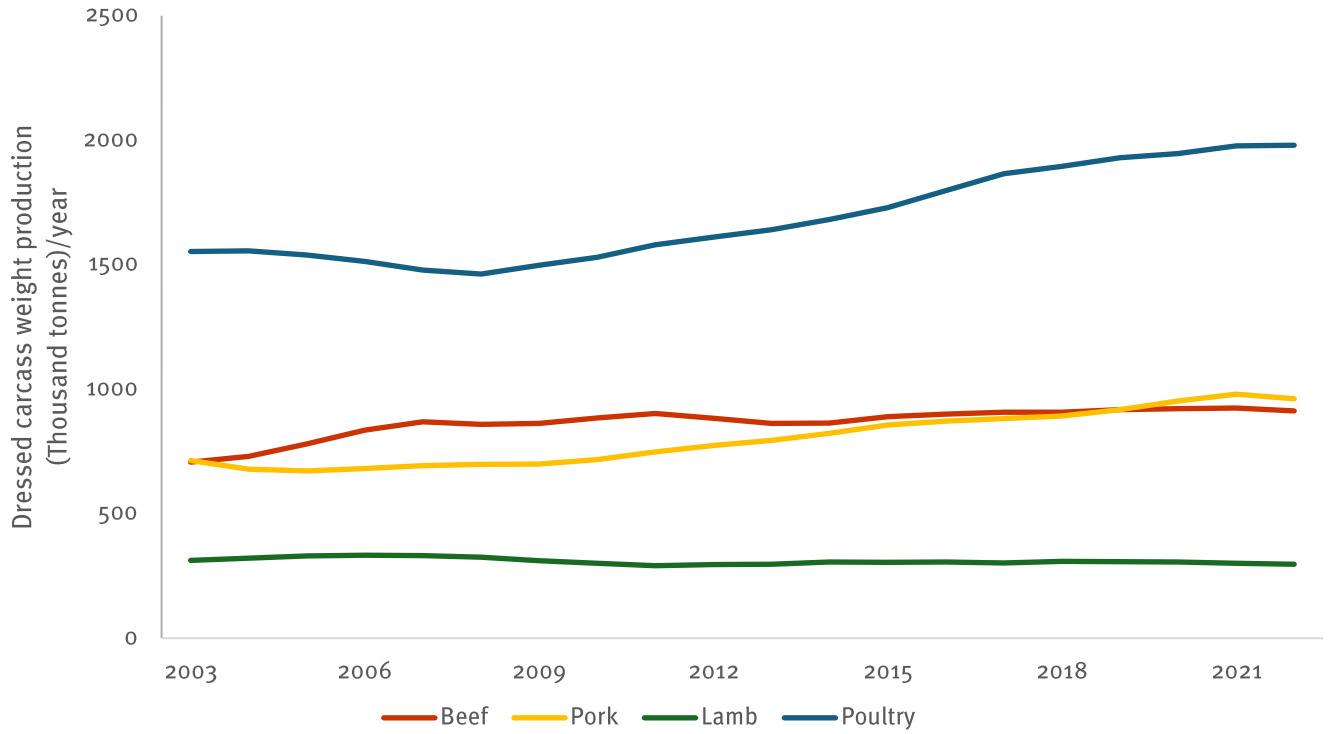
Has eating less meat led to a fall in production?

Eating less meat in the UK has not translated into lower meat production or lower greenhouse gas emissions because the amount exported has risen. Evidence suggests UK herd sizes must fall to meet climate and nature targets. As such, food and farming policy should work together to support reductions in the consumption and production of meat, so the UK does not end up simply shifting the environmental and health impacts overseas. Ensuring demand declines faster than domestic production is critical to avoid displacing the UK's environmental footprint overseas through an increased reliance on imports.

Our analysis of 20 years of data has uncovered that, although UK meat consumption has fallen, meat production over the same period, especially for pork and beef, is still rising.[21] There is a clear disconnect between what the UK eats and what it produces.

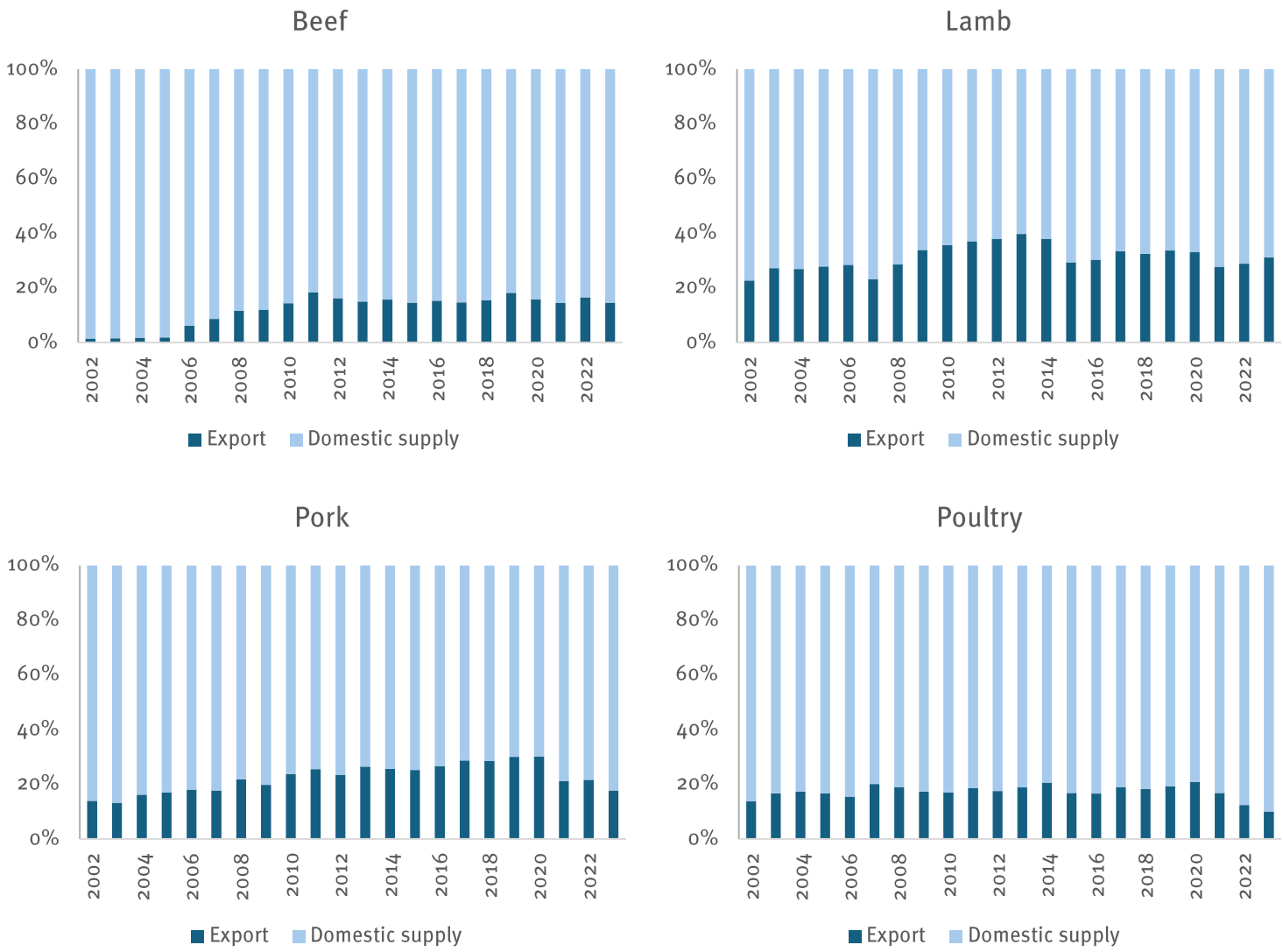
Beef production has increased by 29 per cent and pork by 35 per cent over the past 20 years, while domestic consumption of these meats has fallen. Lamb production has dropped by five per cent but UK consumption has plummeted by almost nine times as much. Meanwhile, poultry production is up 27 per cent, which is nearly three times the rise in UK consumption over the same period.

Change in the production of different meats in the UK (2003-23)



Trade data explains this trend: exports of meat produced in the UK have grown in recent decades, particularly of beef and pork.[22] Beef exports, once a small fraction, now account for 15 per cent of production, while pork exports have also grown since 2003, with a peak of 30 per cent of UK pork produced being exported in 2019. Since 2019, exports of beef and pork have declined, reflecting post-Brexit trade friction making it harder to export to EU markets.[23] Another clear shift is the growing importance of markets outside of the EU. Whereas UK exports once relied heavily on European buyers, a much larger share of UK beef, pork and lamb is now sold further afield. Lamb and poultry exports have remained more stable.

Proportions of total production for domestic consumption and export



Food and farming policies should be aligned, supporting people to eat healthier, plant-rich diets while reducing meat production and ensuring the UK cuts its overall environmental impact, instead of shifting its environmental footprint overseas. While the UK will continue exporting cuts of meat that are less popular domestically, maintaining or increasing production for export purposes should not be viewed as a climate solution.[24] Some organisations argue that doing so could reduce the risk of deforestation overseas if the UK meets rising meat demand in other countries, but this reasoning is flawed because:

1. UK production relies on feed imported from areas experiencing deforestation;[25]
2. similar to the oil and gas industry, there is little evidence that increasing UK meat exports would reduce overall global production or emissions;[26]
3. the UK does not have the price competitiveness of other nations; thus, the use of public money to subsidise production is hard to justify, given pressures on public finances and the negative environmental impacts of meat production.[27]

The UK would contribute more globally by demonstrating ambitious leadership in tackling the emissions from livestock farming, helping to keep climate change at a level that protects global food systems.

Summary of consumption and production trends

Cutting back on meat eating in the UK has not facilitated progress in lowering greenhouse gas emissions or restoring nature so far, as production has remained high. However, the combination of supportive post-Brexit farming policies and food strategies could ensure future meat production falls alongside meat consumption, without a negative impact on farmers.

UK meat production, particularly of red meat, has grown over the past 20 years, even as the UK population has eaten less of it, especially in the past five years. Continued global demand and supportive subsidy schemes have sustained and even encouraged higher domestic output, with surplus meat exported to international markets. However, it is a different story for poultry, where rising consumption has driven both higher production and higher imports.

Despite higher production, the number of farmed animals has mostly declined, apart from poultry which has grown by four per cent. Production has grown due to heavier carcass weights. Efficiency improvements, such as selective breeding and better animal management, have increased productivity, though some of these gains have raised concerns about animal welfare.[28] But efficiency gains alone will not be enough to achieve the emissions reductions needed to tackle climate change or create enough space to restore nature. Evidence suggests that meeting the UK's legally binding climate goals will require lower overall livestock numbers.[29]

To support this transition, England's ELM schemes, and equivalent programmes in the devolved nations, must reward farmers for public goods alongside farming, like better air and water quality, carbon storage and nature benefits. These outcomes are often achieved by managing land differently, and this includes reducing livestock numbers to diversify and free up land for other uses. The pre-Brexit system subsidised practices that increased the negative impacts of meat production, such as expanding livestock numbers and raising greenhouse gas emissions, whereas the new approach aims to promote sustainable, healthy levels of meat production without risking food security. The Land Use Framework will play an important role in this approach by identifying less productive areas of land where funding for environmental activities, or public goods, can be most effectively targeted.

Trends in meat consumption and production outlined in this report raise important questions about what drives farm profitability. For most farm types, export markets and government schemes will help to maintain incomes even when domestic consumption falls.

Changes in consumption, production, exports and imports of different meat types, 2003-23

				
Consumption	-14%	-44%	-13%	+7%
Production	+29%	-5%	+35%	+27%
Exports	+1135%	+9%	+89%	+5%
Imports	-2%	-54%	-16%	+38%

What makes a farm profitable?

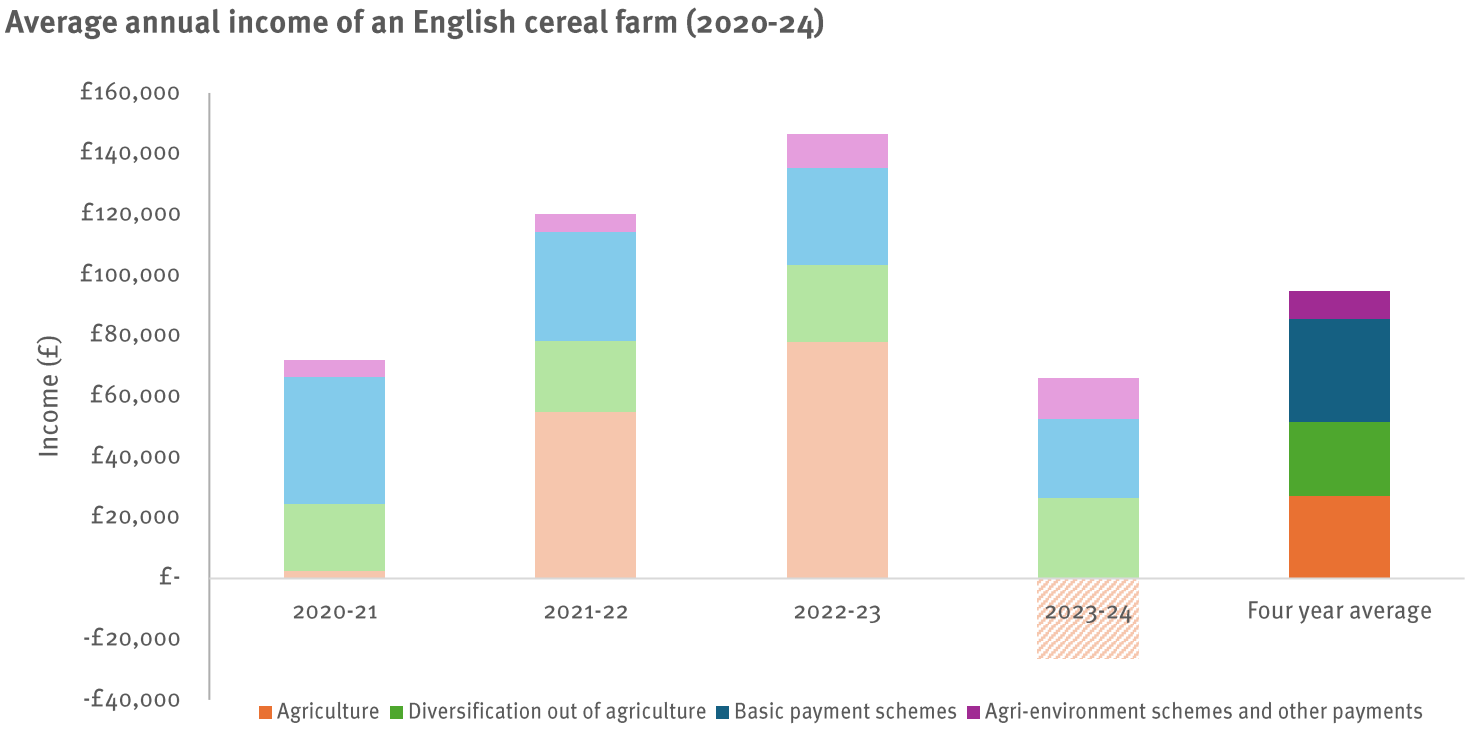
English farm viability is unevenly distributed. In the past four years, upland and lowland grazing and mixed farms have struggled to make a profit from agriculture alone, relying on government schemes to survive, while facing growing business risks from climate impacts. Only pig and poultry farms show resilience in profitability over the same period. This underscores the need for policies that give farmers a reliable income stream by supporting the provision of public goods, like carbon storage, landscape management and habitat protection, alongside farming.

Below is our summary assessment of information provided in the Farm Business Income Dataset for English farms from 2020 to 2024, indicating sources of income for farm types linked to livestock production.[30]

Cereal farms

Cereal farms occupy the most land of any farm type in England and around 40 per cent of cereals grown are fed to livestock.[31] This means a reduction in livestock numbers could directly affect the market for cereals. However, a significant share of cereals from the UK are exported, with grain prices for both exported and domestically sold cereals set by global markets. A slight reduction in UK feed demand is unlikely to affect global prices, amid increasing global demand.

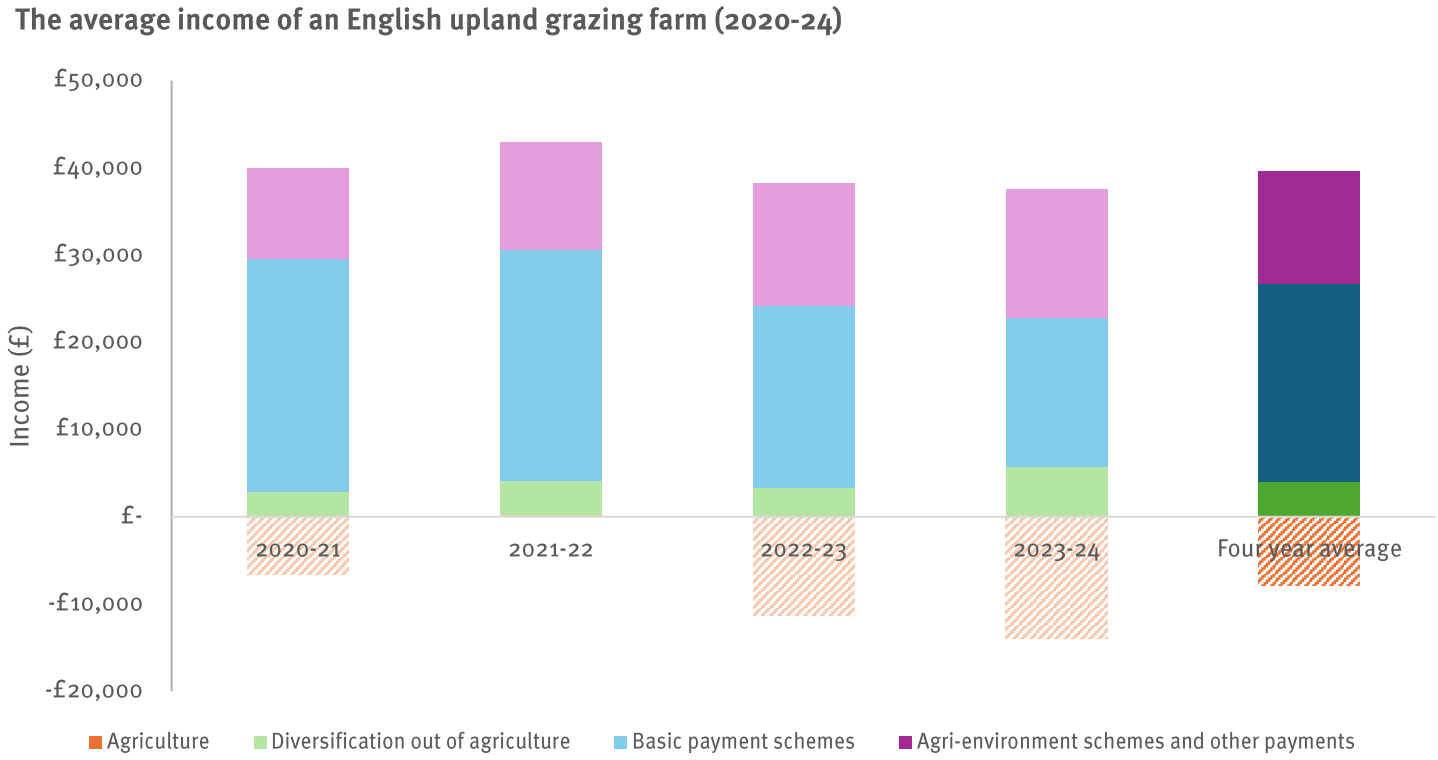
Cereals farms are already seeing business volatility due to climate change impacts, rather than from changes to UK livestock feed demand. In 2023-24, poor cereal harvests, including wheat, which fell by almost a fifth, led to the average cereal farm failing to make a positive return on crops, with average losses of £26,400. Government schemes paying for environmental outcomes offer an essential income stream for these farms in bad years, at times contributing nearly half (46 per cent) a farm's total income.

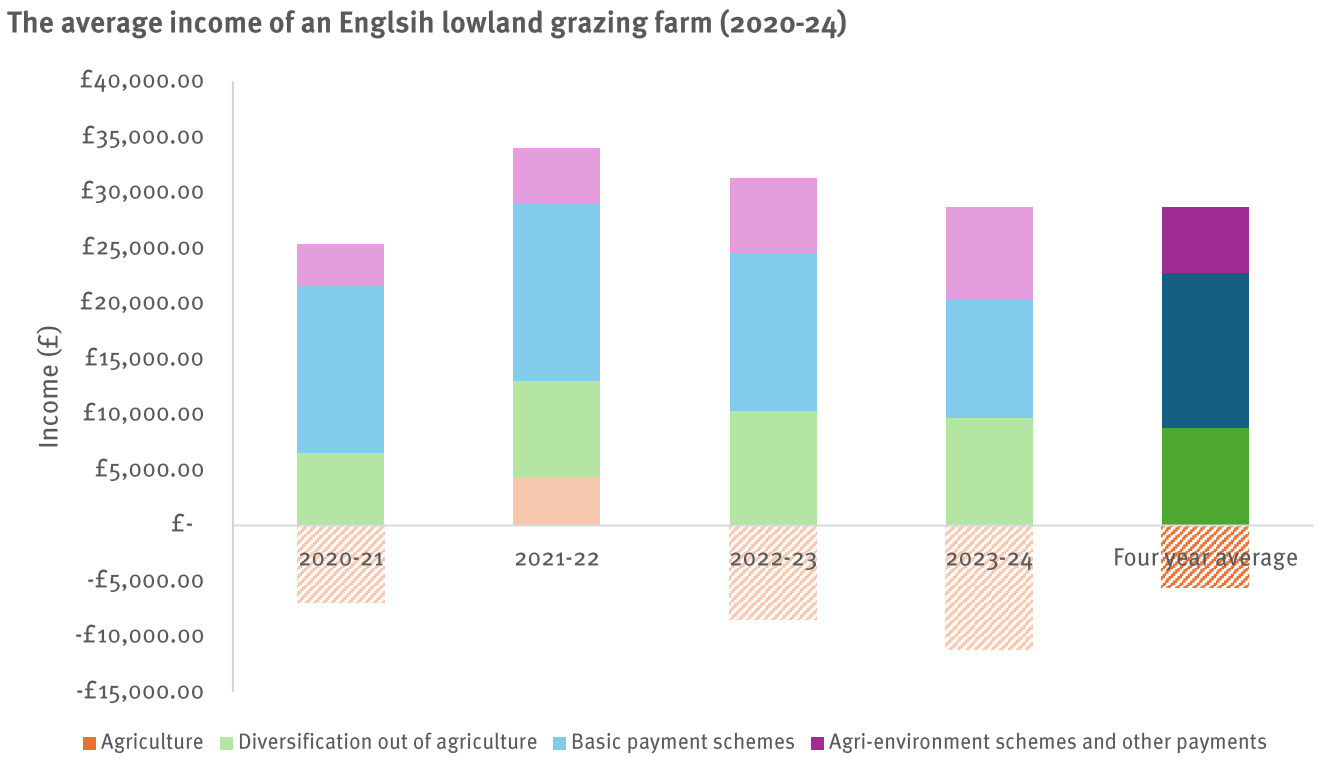


Grazing farms

Grazing farms in England are found in the uplands and lowlands. Upland grazing is often located in hilly or 'less favoured' areas where other types of farming are less viable. These occupy around 14 per cent of England's total agricultural land.[32] Lowland grazing farms are more widespread, representing 30 per cent of all farms and cover another 14 per cent of the agricultural land in England.

Small reductions in UK lamb and beef consumption is unlikely to negatively affect these farms as their diversified farm business activities (such as renewable energy projects or running a bed and breakfast) and agri-environment schemes, are the main reasons they remain profitable, while beef and lamb production tends to be loss-making. The Basic Payment Scheme (BPS) has helped to keep these farms profitable, but it is being phased out and replaced with the ELM schemes which reward farms for public goods. In many cases, grazing farms are more profitable when they reduce their herd size, because they reduce input costs and because it enables them to participate in, and be paid for agri-environment schemes. ELM will have much more impact on the future profitability of these farms than relatively small changes in the amount of meat eaten in the UK.

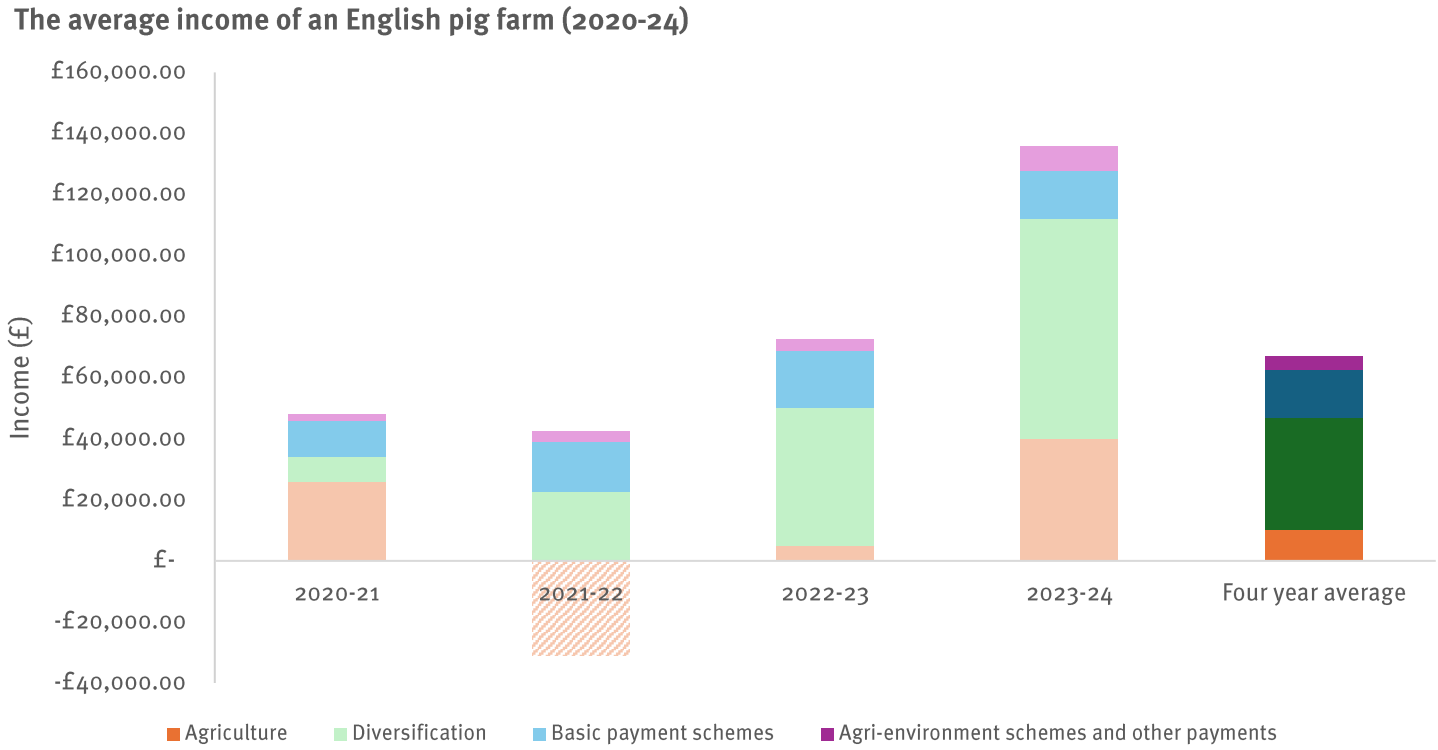




Pig farms

In 2023, there were around 1,700 pig farms in England, occupying about one per cent of the total agricultural area.[33] These farms typically earn a profit from farming activities (except for in 2021-22, due to high feed, labour and electricity costs). Profits in 2023-24 were exceptional and driven by high prices, in part due to African swine flu leading to mass culls of pigs in China.[34]

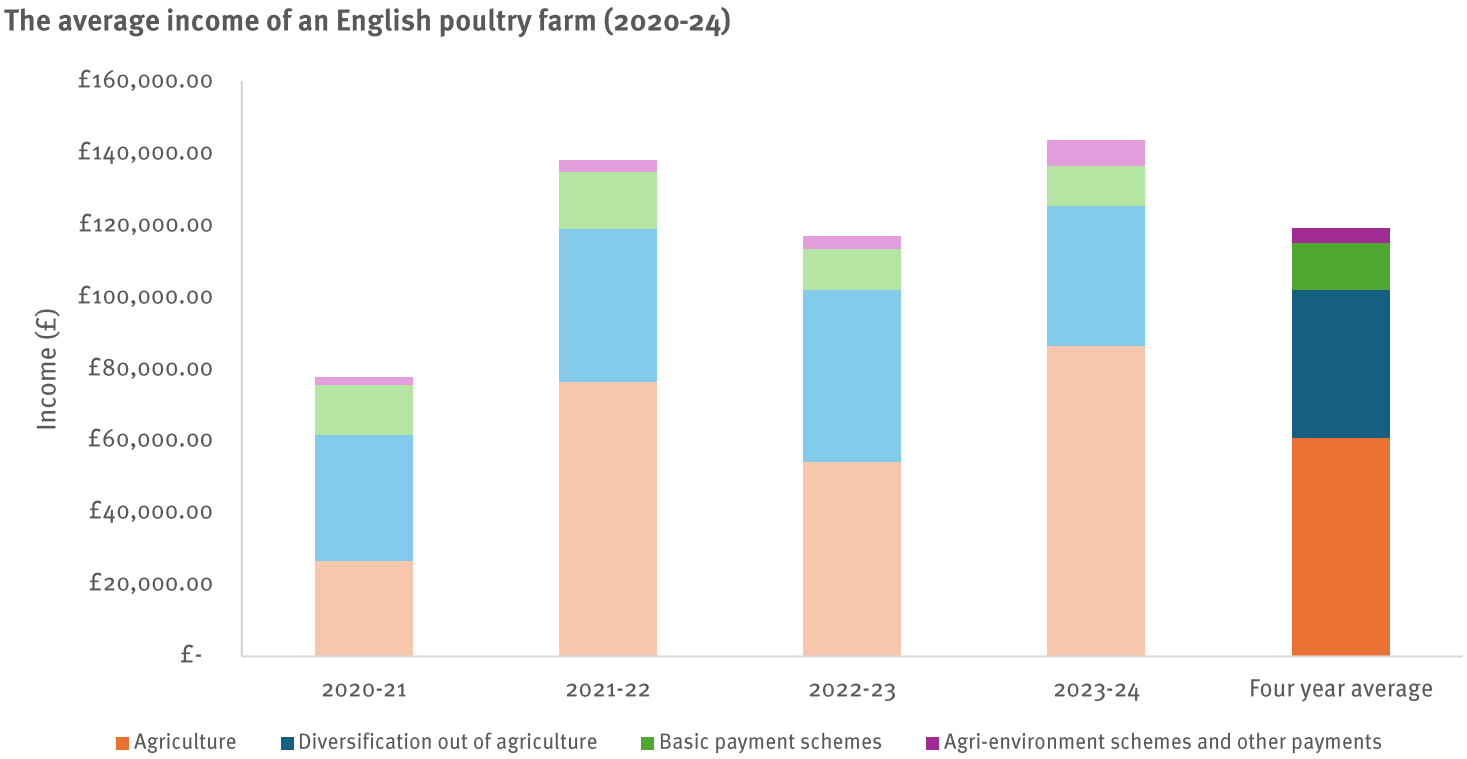
These farms gain little from agri-environment schemes. This is unlikely to change, despite the rollout of ELM, since pig farms tend to be small operations without much land that can be used for public goods delivery (two thirds of pig farms occupy fewer than 20 hectares).[35] Therefore, unlike grazing farms, pig farms are unlikely to respond to a reduction in domestic pork consumption by expanding their participation in agri-environment schemes. Instead, exports, which are already up 89 per cent since 2003, may rise further but, in the absence of increased export opportunities, reduced domestic demand would see the UK's pig herd shrink.



Poultry farms

Poultry farms make up one per cent of the agricultural area of England but contribute 11 per cent to the total value of UK agricultural output.[36] They are among the most profitable farms in the UK, with farming activities making up over half of their total average income over the past four years. Diversification income is significant, but not from agri-environment schemes which form a very small portion of their income.

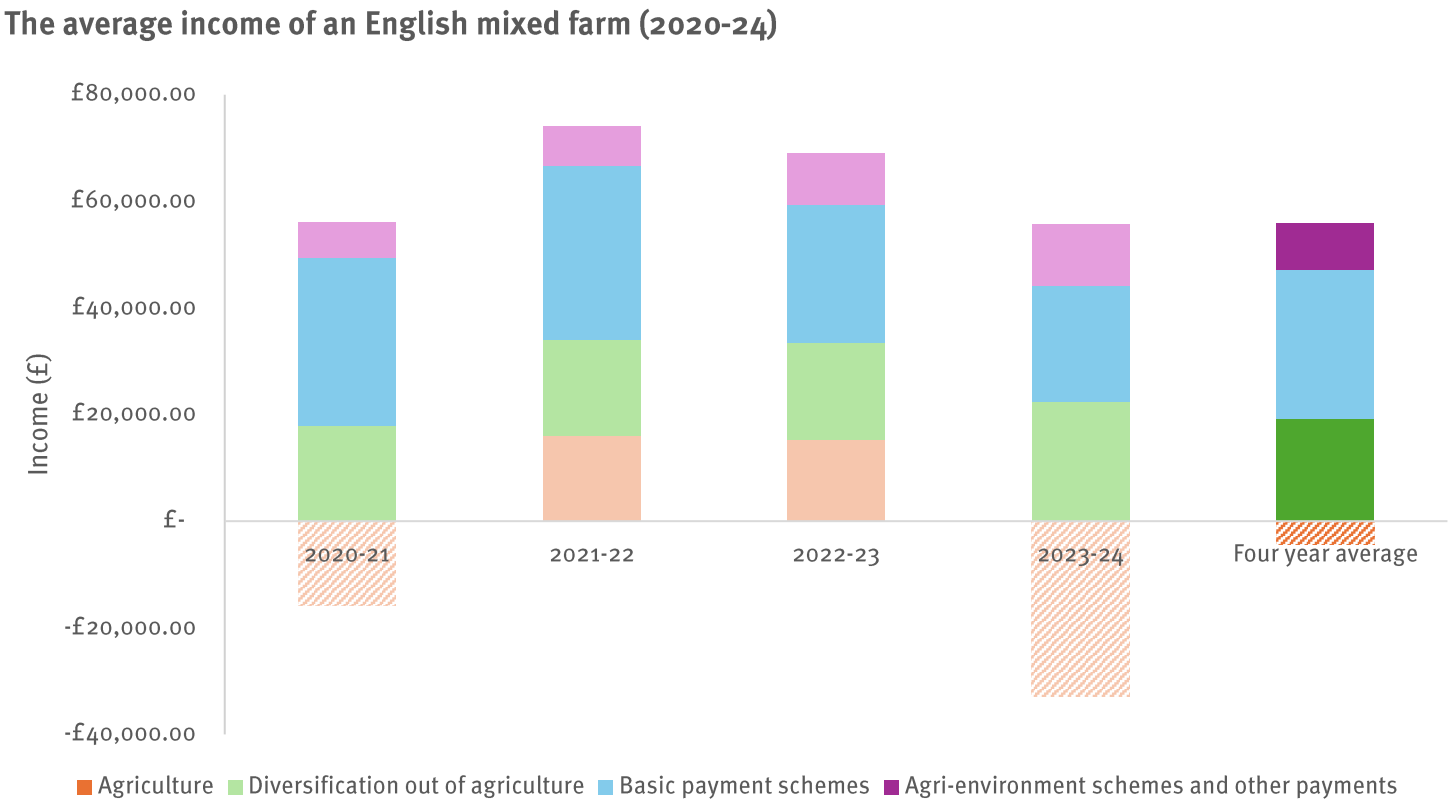
At present, rising demand for chicken is boosting their profitability. But, as with pig farms, if this trend was reversed, these farms are unlikely to respond by increasing their agri-environment scheme activity, owing to their relatively small land footprint. Instead, poultry farmers may choose to increase their exports, or undo some of their recent growth by shrinking production.



Mixed farms

Mixed farms make up seven per cent of all agricultural area in England and produce both livestock and arable crops. Income for these farms has been variable over the past four years, with profits taking a hit in 2023-24 when, on average, they made a loss of £32,900. During this period, output fell mostly from crops due to climate change induced weather impacts. Similar to cereal farms, mixed farms were able to remain profitable during these periods only due to government support schemes.

These farms will need to grow their diversified and agri-environment income to remain profitable as the Basic Payment Scheme is phased out. A fall in meat consumption, in line with the need to reduce grazing livestock numbers nationally, could lead to a rebalancing of activities on these highly diversified farms enabling them to access more agri-environment income.



Supporting a fair transition

Farms in England, and across the UK, are struggling with low profitability. The decline in meat consumption over the past 20 years has had little impact on farm profits. Surpluses in beef, lamb and pork have been exported, and farmgate prices have increased due to the surging global appetite for meat.[37]

Our analysis suggests that the future profitability of many livestock grazing farms depends on opportunities they can secure through ELM to diversify their income. ELM schemes are a powerful lever to drive changes to land use and management on these farms in line with the UK's climate and nature targets.

But, unlike livestock grazing farms, the practices of pig and poultry farms will be harder to influence via ELM because they are profitable without government support. While greenhouse gas emissions from these types of farms are much lower than from beef and sheep farms, they still pose other environmental risks such as nutrient pollution and runoff.[38] Because financial incentives are unlikely to drive major change in these cases, stronger regulation will be needed to reduce impacts and ensure production is compatible with the UK's climate and nature goals.

Policy must be co-ordinated across environmental farming incentives, food strategy and international trade to support a fair transition for farmers, while moving the UK towards a healthier and more sustainable food system. To achieve this, we recommend that the government should:

- **Build on existing public momentum and use the food strategy to reduce meat consumption to healthy and sustainable levels**
  Modest reductions in meat consumption are already occurring and are unlikely to dramatically threaten overall farm profitability in the short term. The food strategy should give people better access to plant-rich diets to enable meat consumption to continue to fall. It is crucial that consumption falls more rapidly than domestic production as this will help to prevent offshoring environmental impacts through greater reliance on imports.
- **Develop ELM schemes to create more business opportunities for grazing livestock farmers**
  As the profitability of many livestock farms depends on opportunities under ELM, significant expansion of the Landscape

Recovery and Higher Tier schemes is needed as they are better suited to these farm types. This should be set out in the forthcoming 25 Year Farming Roadmap to give farmers confidence in the opportunities available to them.

- **Publish and implement a Land Use Framework as a priority**

  The framework should be used to guide ELM spending to areas where food production and farm profitability are low and where there is high potential to generate public goods, such as landscape enhancement, habitat restoration and carbon storage. This would drive funding into areas currently dominated by livestock grazing.

Endnotes

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