

UK GLOBAL TRACKER: 2025 UPDATE

Explore how UK consumers purchase beef and lamb, the positioning of Australian red meat in the category, and consumer behaviour changes since 2021.



KEY TAKEAWAYS

- 1 GROWING INTEREST IN IMPORTED RED MEAT**
Australian red meat will continue to benefit from increased awareness and differentiation by aligning with UK consumer values around quality, particularly eating quality and meat tenderness, and natural and sustainable products underpinned by responsible production.
- 2 REINFORCE AUSTRALIAN PROVENANCE, QUALITY AND ETHICAL SOURCING**
Australian red meat can gain favour from raising awareness and its alignment with consumer values around taste, tenderness, and responsible sourcing.
- 3 CHANNEL MIX DIVERSITY**
UK shoppers buy red meat from a wide mix of retail channels, offering a range of opportunities for Australian beef and lamb products in the retail sector.



WHAT DRIVES CONSUMER DECISIONS IN 2025?

- RISING ETHICAL DEMAND FOR PREMIUM MEAT**
Consumers are willing to pay more for ethical and sustainably sourced meat.
- LOCAL SUPPLY CONSTRAINTS FOR BEEF AND LAMB**
UK beef and lamb production are trending downwards and are forecast to decline at the same time as consumption demand remains stable.
- INFLATION DRIVING AT-HOME CONSUMPTION**
Rising prices in the out-of-home market are driving consumers to eat out less and dine more at home.



IMPORTED BEEF ON THE RISE

- Monthly imported beef purchases rose from 39% to 57% amongst British consumers. Local beef remains the preferred beef but imported beef, like Australian, is gaining traction.
- 60% of Britons say they would choose or seriously consider Australian beef (+11% vs 2021), reflecting stronger brand awareness and appeal than in 2021.
- There is a small yet growing interest in marbled beef. Awareness of high marble score beef has increased with 63% agreeing that fat enhances meat taste. Those that purchased high marble score beef enjoy the flavour, tenderness and quality.

20%

OF UK CONSUMERS ARE AWARE OF HIGH MARBLE SCORE BEEF (+2% vs 2021)

- Packaging and visual cues can influence purchase choice. Shoppers prioritise perception of freshness over price with the top key visual cues when purchasing beef being meat colour, fresh appearance and “naturalness.”

Top visual cues when buying beef (% of respondents)

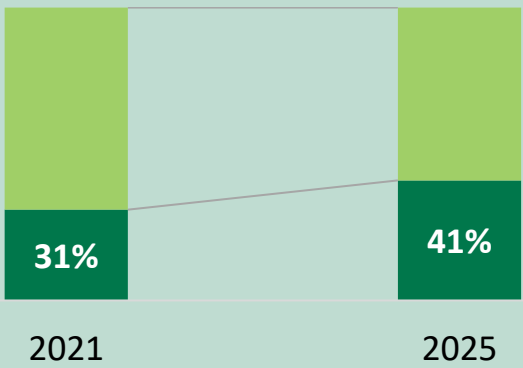
Colour of meat	53
Freshness	43
All natural	38
Date packed	36
Price per pack	31



STABLE LAMB CONSUMPTION

- Monthly purchases of imported lamb rose from 49% to 58%, reflecting growing consumer openness to imported lamb.
- Among 18–34-year-olds, weekly lamb purchases doubled from 23% to 45%, as concerns over fat content and price have eased.
- While still trailing other imported lamb in recognition, awareness of Australian lamb has shown modest growth since 2021.

Total awareness of Australian lamb



- Supermarkets remain dominant, with 71% buying lamb monthly. Yet popularity of butchers (41%), farmer’s markets (16%), convenience stores (13%) and online platforms (10%) highlight the diversity of retail channels where lamb can be showcased.

Where UK shoppers purchase lamb (% at least once a month)

