

Beef, pork and poultry imports into the UK and EU | 30 September 2026

European meat buyers face a varied market outlook across beef, pork and poultry as the last quarter of 2026 begins. Beef supply remains constrained, EU pork is comparatively competitive, and poultry import patterns are being reshaped by EU approval rules. The implications vary by destination, product format and customer specification. This outlook highlights the developments that might influence conversations through October and the rest of Q4.

Beef

The European Commission forecasts EU beef and veal production at 6.25 million tonnes in 2026, down 2% from 2025, while imports are forecast to rise 12% to 469,000 tonnes. This points to continued reliance on external supply, although imported steak and manufacturing beef respond to different demand and price signals. [1]

From 3 September, EU antimicrobial rules have required eligible third countries to be listed for each relevant commodity. Brazil was not 'on the list' for beef and poultry at implementation; ongoing discussions may change the position. The extent to which other origins fill any gap will depend on their availability, specifications and trade terms. [2, 3]

The UK market has its own import regime. Domestic production is expected to ease in 2026, while access under the UK-US beef arrangement adds another dimension to premium import competition – but most probably tempered by continuing low cattle numbers in the US leading to still high prices; alongside a tricky calculation in terms of non-hormone treated carcass balance for US producers aiming to sell into the EU and UK. Possible diversion of Brazilian product from the EU deserves attention, but the effect on UK prices or volumes is uncertain. [4, 5]

Pork

EU pigmeat output is forecast at around 22.1 million tonnes in 2026, broadly stable year on year. Lower EU prices and disruption to some export flows have kept the UK and continental markets closely linked. The producer price gap is an indicator of competitive pressure rather than a direct measure of the landed cost of individual cuts. [1]

Seasonal demand may strengthen hams and shoulders in the final quarter. Origin, welfare standards and customer requirements will remain material to the comparison of offers.

Poultry

The EU's commodity-specific antimicrobial listing also affects poultry access. Brazil's position is especially relevant to imported chicken and prepared products, but substitution between raw, salted and cooked lines is not straightforward. Thailand and Ukraine remain important origins to watch as buyers assess availability and product fit. [2, 3, 6]

Great Britain takes separate animal health and import decisions. This creates the potential for UK and EU poultry sourcing origins to diverge during Q4. The commercial effect will depend on the precise product and applicable approvals at the time of shipment. [7]

Trade access and other European markets

The EU–Mercosur interim trade agreement has applied provisionally since 1 May 2026. Its beef access is phased, so the eventual headline quota should not be read as immediately available volume for one origin. The UK–US beef quota is administered on a first come first served basis. In both cases, usable access depends on the live tariff, quota and product conditions. [5, 8]

Importers are relating experiences of vessel delays from South America and quota administration under the new regulations has been challenging; this is adding tension to the market.

Switzerland and Norway offer selective premium outlets beyond the EU and UK. Their quota and licensing structures make them more relevant to targeted programmes than broad volume assumptions. [9]

Issues to watch in Q4

- EU updates to third-country antimicrobial listings and plant approvals, particularly for Brazil.
- EU and UK beef supply, together with the pace of import substitution by origin and cut.
- Pork price spreads and the effect of export restrictions on product available within Europe.
- Poultry availability across approved origins and product formats.
- Live quota access, freight and currency movements as seasonal buying develops.
- EUDR will (probably?) finally come into force in the EU on January 1st, and this is another issue which requires careful attention. *Meat Advisory has specific, detailed, recent and relevant experience of this, so please let us know if we can help.*

Meat Advisory works with suppliers, importers and customers on market access, product alignment and commercial development across international meat markets. For a discussion of what these developments mean for a specific programme, contact [Paul Garnham](#)

Sources and scope

[1] AHDB, EU red meat short term outlook, 5 August 2026 (European Commission forecasts): <https://ahdb.org.uk/news/eu-red-meat-short-term-outlook-mid-year-update-2026>

[2] European Commission, EU antimicrobial rules for imports: https://food.ec.europa.eu/animals/animal-health/veterinary-medicines/eu-antimicrobial-rules-imports-animals-and-animal-products_en

[3] European Commission, 1 September 2026 briefing on Brazilian meat: <https://audiovisual.ec.europa.eu/en/media/video/I-293778>

[4] AHDB, UK beef market outlook: <https://ahdb.org.uk/beef/market-outlook>

[5] UK government, Notice to Traders 01/26, USA beef preferential tariff quota: <https://www.gov.uk/government/publications/notice-to-traders-0126-usa-beef-preferential-tariff-quota/notice-to-traders-0126-usa-beef-preferential-tariff-quota>

[6] European Commission, poultry market overview: https://agriculture.ec.europa.eu/data-and-analysis/markets/overviews/market-observatories/meat/poultry_en

[7] Defra, topical animal product import issues: <https://www.gov.uk/government/publications/topical-issues-imports-of-animals-and-animal-products>

[8] European Commission, EU–Mercosur provisional application, 30 April 2026: https://policy.trade.ec.europa.eu/news/eu-mercotur-interim-trade-agreement-starts-provisionally-apply-2026-04-30_en

[9] Swiss Federal Office for Agriculture, meat imports: <https://www.blw.admin.ch/en/meat-imports>

Public information available on 29 September 2026. Forecasts and historical figures are labelled; forward-looking market observations are Meat Advisory analysis. Trade eligibility and quota balances can change.