

Substituting imports for growth

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January 2026



£64.1 bn

62%

**14th
August**

£2.5bn



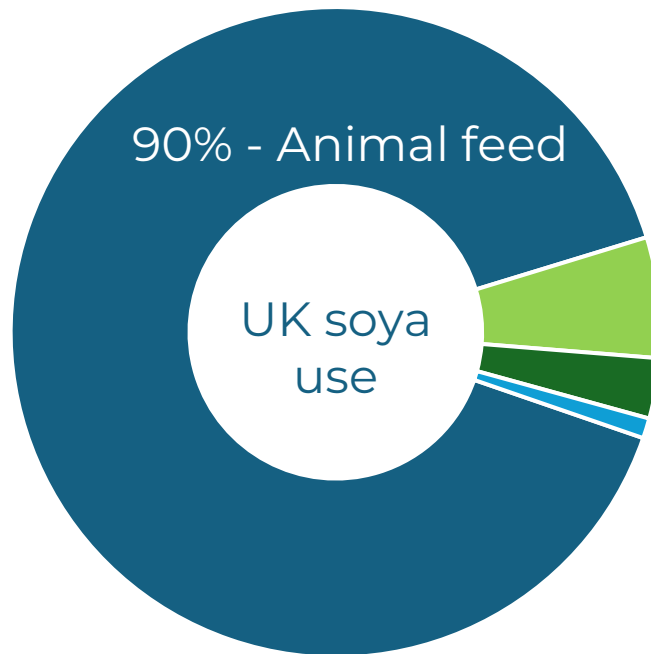
A photograph of a grocery store's produce section. The shelves are filled with various vegetables. In the top row, there are baskets of leafy greens, packaged vegetables, and several baskets of cherry tomatoes. Below that, there are more baskets of tomatoes and a large display of colorful bell peppers in yellow, red, and green. The bottom row features bins of cucumbers, leeks, and other vegetables. The shelves are well-lit, and the produce appears fresh.

What are the biggest potential substitution opportunities?

Soya

**3 million
tonnes**

of soya imported
to the UK per year



34%
Argentina



27% Brazil



13% - US

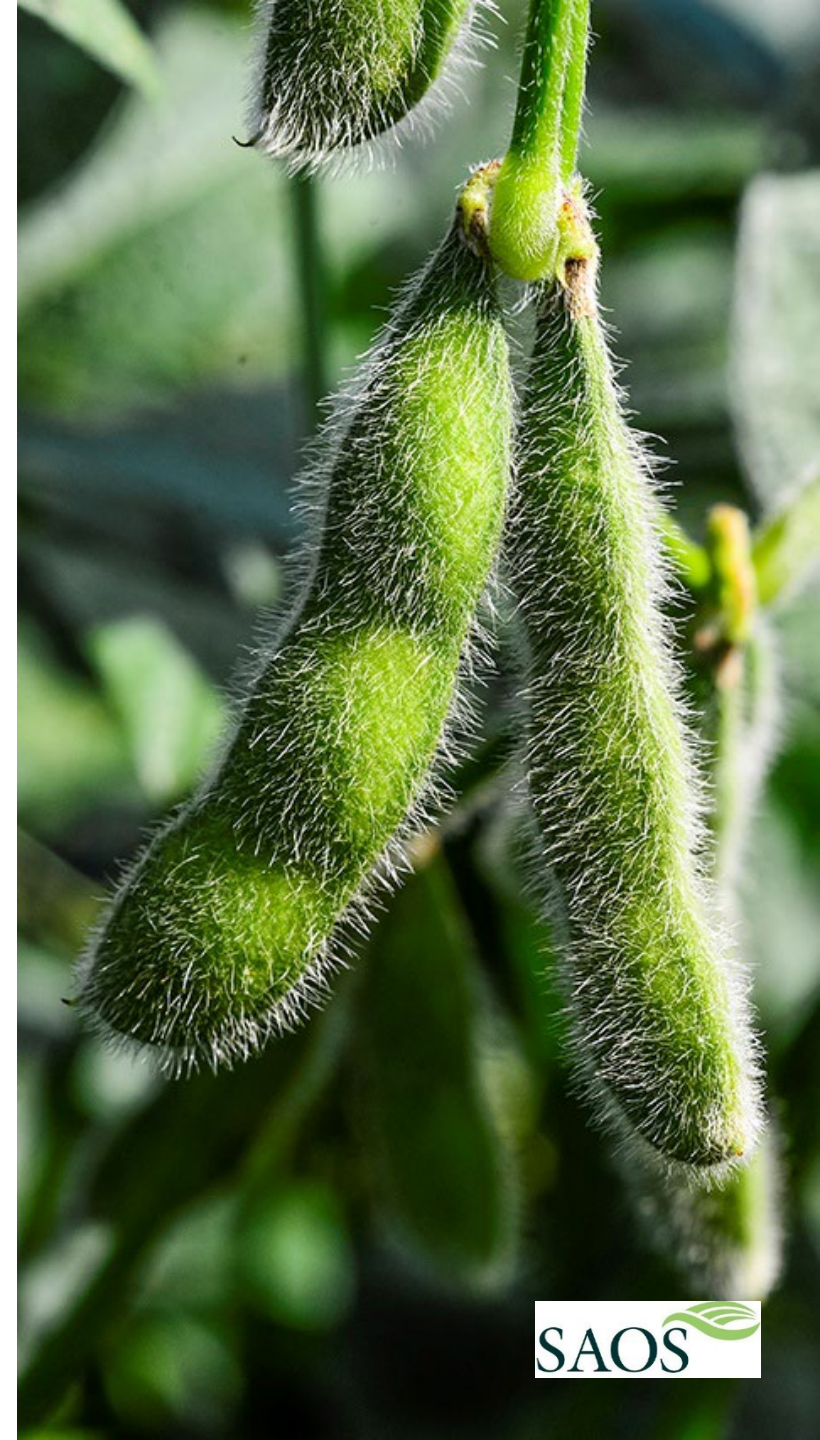


27% Other
(Paraguay,
Canada, EU)

6% - Human food

3% - Industrial uses

<1% - Biodiesel



Soya replacement - options



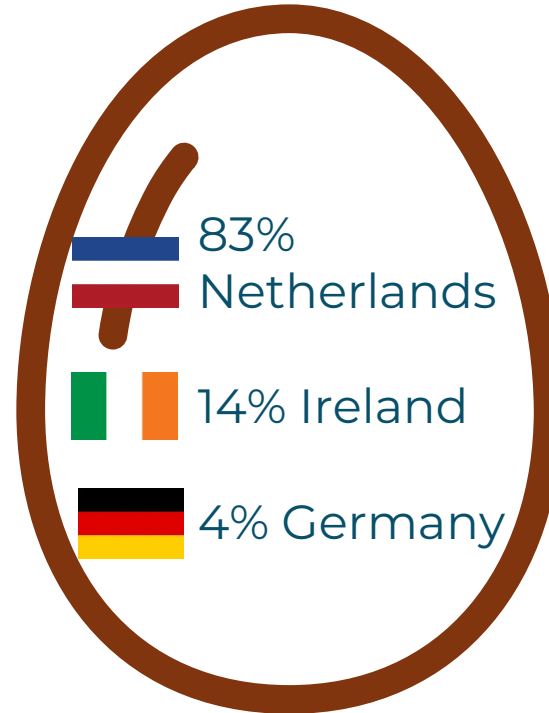
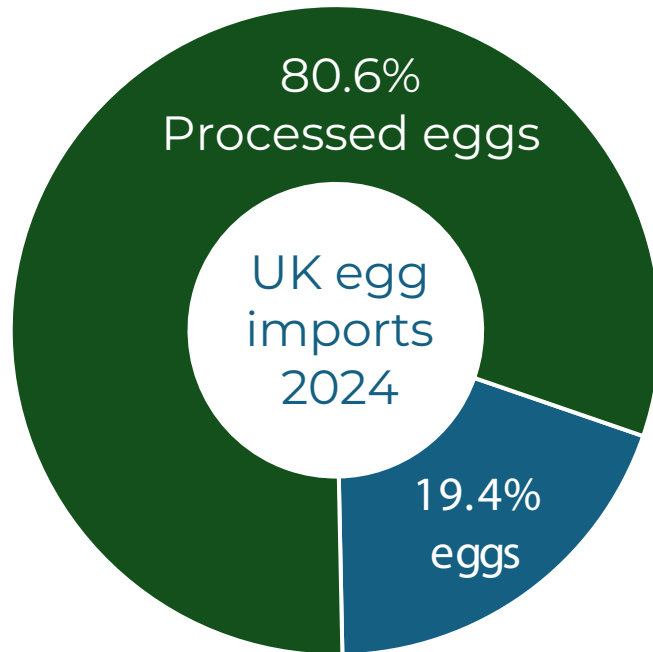
Factors to consider

- Nutritional profile
- Digestibility
- Taste/ texture
- Scalability
- Ease of formulation
- Price
- Regulatory restrictions

Eggs

£132m

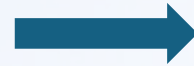
of eggs and
processed eggs
imported into the UK
in 2024



Dairy

£1.1bn

dairy products
imported into
the UK in 2024



Cheese

£600m

Butter

£196m

UK dairy
imports
2024

Concentrated
Milk

£139m

£171m

Milk

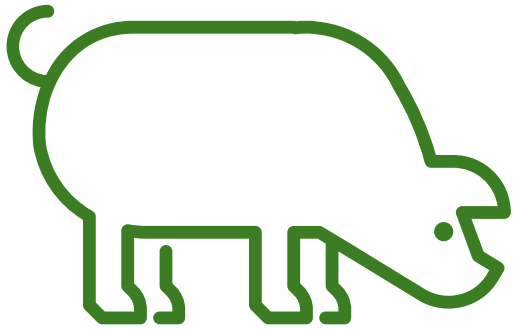


Cheese imports
declined by £144m
between 2019/20 and
2023/4,

but still account
for over 50% of
dairy imports

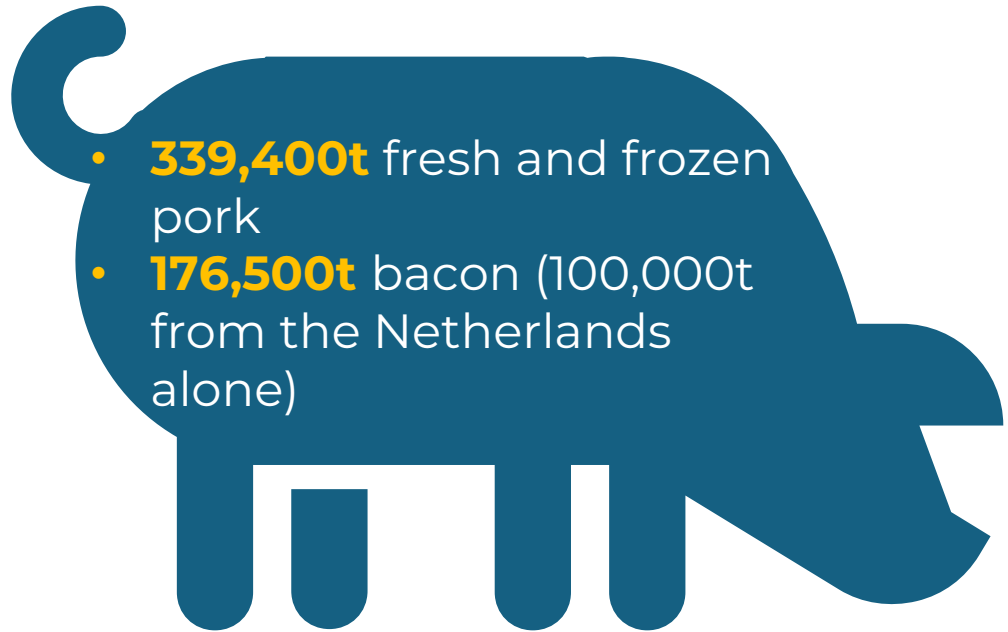
Pigs

The UK is **58.5%** self sufficient when it comes to pig meat



789,300t
were imported
in 2024

Imports in 2024
included



- **339,400t** fresh and frozen pork
- **176,500t** bacon (100,000t from the Netherlands alone)

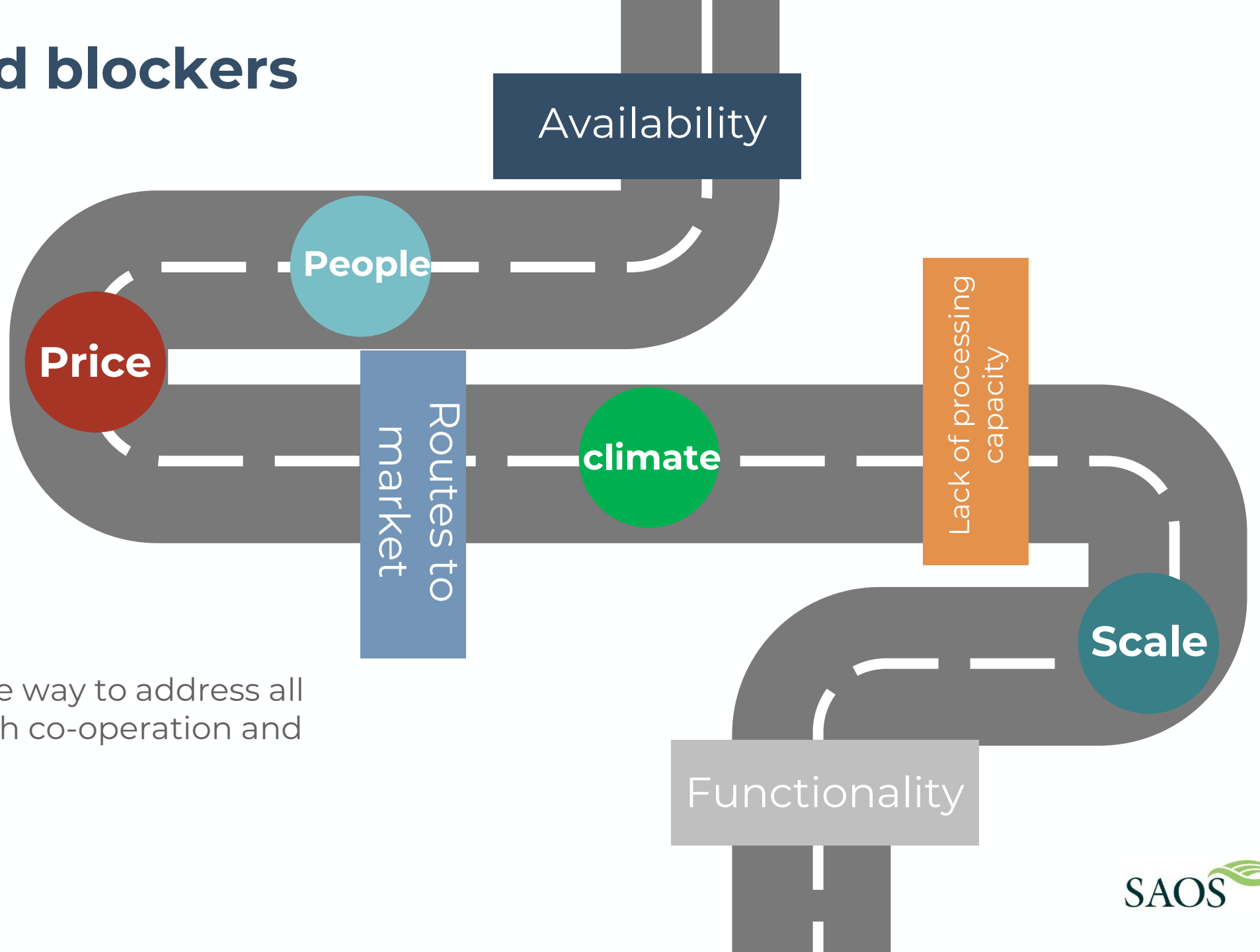
With a total value of
£2.95bn

**But it's not
all about the
big headline
opportunities**



Barriers and blockers

These are some of the more common obstacles in the way of reducing imports into Scotland



The most effective way to address all of these is through co-operation and collaboration

Import Substitution



Market & trade insight
into substitution
opportunities



Understanding of
supply chain capability
& capacity



Key customers supply
gaps – wholesale, retail &
foodservice



Non-food stuffs



Technology & support
to develop product
substitution



Sourcing for Growth

An aerial photograph of a train traveling through a dense forest. The train consists of several teal-colored passenger cars and is moving along a set of tracks that curve through the landscape. The forest is in autumn, with trees displaying a mix of green, yellow, and orange foliage. A soft, hazy atmosphere surrounds the train, suggesting mist or smoke. The text "Thank you!" is overlaid in a large, white, sans-serif font in the center of the image.

Thank you!