





Retail Market Update

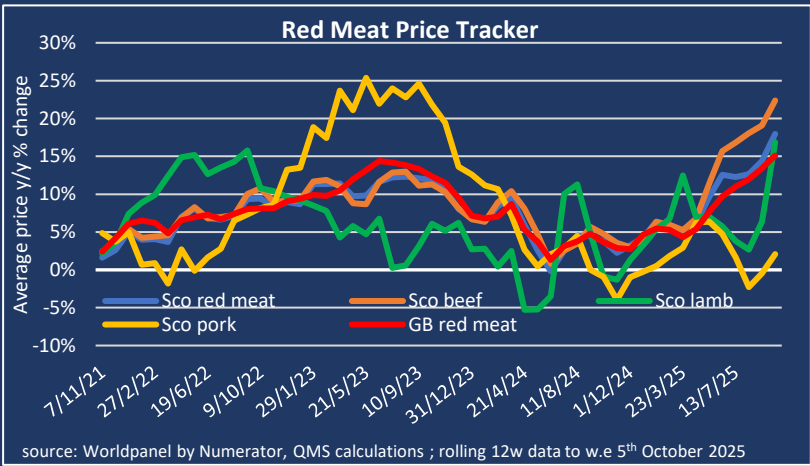
For the 12 weeks ending 5th October 2025
Data source: Worldpanel by Numerator UK,
primary red meat only

Scotland At A Glance

Total red meat	Beef	Lamb	Pork
			
Latest 12 weeks Spending +15.4% Volume -2.2% Avg price £/kg +18.0%	Latest 12 weeks Spending +17.3% Volume -4.1% Avg Price £/kg +22.4%	Latest 12 weeks Spending +23.2% Volume +5.4% Avg Price £/kg +16.9%	Latest 12 weeks Spending +4.1% Volume +2.3% Avg Price £/kg +1.8%

Scotland: Rising Demand for Quality Red Meat as Christmas Nears







Total spending on red meat in Scotland rose by 15.4% year-on-year, driven mainly by price inflation. Growth was recorded across beef, lamb and pork, with lamb and pork continuing to see volume uplifts. Beef continues to hold its place at the heart of Scottish households, with beef mince volumes fell only 0.4% despite a sharp price inflation increase of 38.6%. Lamb continued to be a standout performer, with lamb steak volumes surging by nearly 40% despite higher prices, underlining consumers’ appetite for premium cuts. Pork also benefitted from its strong value position, with chops, mince and steaks all delivering volume gains. Some of this growth reflects shoppers switching from beef into pork as beef prices continue to surge, making pork a more affordable alternative. Overall, demand for quality red meat is building up as we approach Christmas, with Scottish consumers prioritising quality for special occasions while economising on everyday meals.



Price inflation

- Red meat price inflation in Scotland has accelerated in 2025, reaching a new high of 18% in October - above GB level of 15.1% for the 12 weeks ending 5/10/25.
- Overall red meat price inflation is being driven by beef and lamb. Scottish beef inflation has surged sharply since early 2025, now at around 22.4%, as the surge in farmgate prices in 2025 has passed through to consumer prices.

Red meat cuts in Scotland

	 Spending Million £	Spending yoy	 Volume kg	Volume yoy	 £/kg	Average price yoy
 Primary beef	£61.3	17.3%	4.85m	-4.1%	12.65	22.4%
Beef diced	£4.0	7.9%	0.33m	-1.9%	11.91	9.9%
Beef mince	£29.4	38.0%	3.00m	-0.4%	9.81	38.6%
Beef roasting	£4.3	-9.7%	0.35m	-20.5%	12.22	13.7%
Beef steak	£21.9	6.9%	1.00m	-8.9%	21.80	17.4%
Beef stewing	£1.5	15.2%	0.13m	7.2%	11.70	7.5%
 Primary lamb	£7.4	23.2%	541.1k	5.4%	13.72	16.9%
Lamb chop	£1.9	23.4%	123.9k	5.4%	15.15	17.1%
Lamb steak	£1.7	41.1%	98.5k	39.7%	17.22	1.0%
 Primary pig meat	£12.3	4.1%	1.85m	2.3%	6.66	1.8%
Pork chop	£1.5	35.1%	0.19m	19.0%	7.78	13.6%
Pork medallion	£0.9	-2.9%	0.09m	-13.5%	9.64	12.2%
Pork mince	£1.7	2.9%	0.32m	2.7%	5.21	0.3%
Pork roasting	£1.9	-6.3%	0.36m	-8.6%	5.36	2.5%
Pork steak	£3.8	24.8%	0.52m	15.2%	7.27	8.3%

*Low sample size, use with caution