





# Retail Market Update

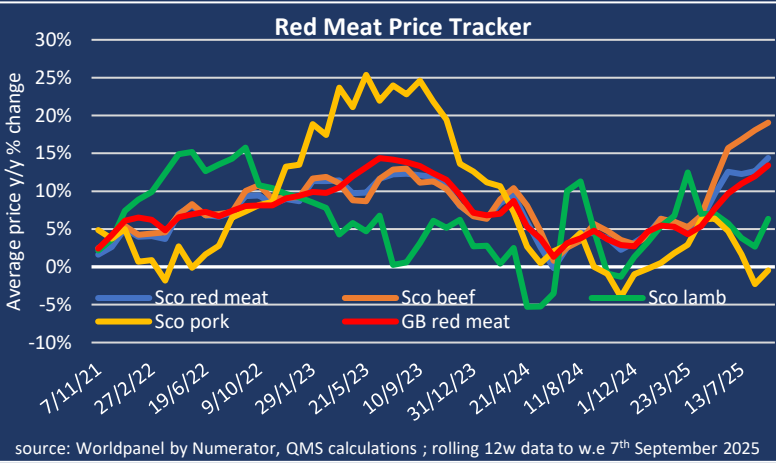
For the 12 weeks ending 7<sup>th</sup> September 2025  
Data source: Worldpanel by Numerator UK,  
primary red meat only

## Scotland At A Glance

Total red meat	Beef	Lamb	Pork
			
<b>Latest 12 weeks</b> Spending +13.7% Volume -0.6% Avg price £/kg +14.4%	<b>Latest 12 weeks</b> Spending +16.6% Volume -2.1% Avg Price £/kg +19.1%	<b>Latest 12 weeks</b> Spending +22.8% Volume +15.5% Avg Price £/kg +6.4%	<b>Latest 12 weeks</b> Spending +1.3% Volume +2.2% Avg Price £/kg -0.9%

## Scotland: Shoppers Show Strong Appetite for Quality Red Meat







Total spending on red meat in Scotland rose by 13.7% year-on-year, driven mainly by price inflation. Growth was recorded across beef, lamb and pork, with lamb seeing the strongest uplift in volumes – supported by more grilling occasions during this year’s sunnier summer. Beef continues to hold its place at the heart of Scottish households, with beef mince volumes edged up by 0.2%. Lamb was a standout performer, with lamb steak volumes surging by nearly 25% 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, shoppers are not only continuing to buy red meat but are also showing a willingness to invest in quality, even in the face of rising prices.



## Price inflation

- Red meat price inflation in Scotland has accelerated in 2025, reaching 13.7% in September - slightly above GB level of 13.4% for the 12 weeks ending 7/9/25.
- Overall red meat price inflation is being driven primarily by beef. Scottish beef inflation has surged sharply since early 2025, now at around 19%, 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
 <b>Primary beef</b>	<b>£57.7</b>	<b>16.6%</b>	<b>4.66m</b>	<b>-2.1%</b>	<b>12.38</b>	<b>19.1%</b>
Beef diced	£3.1	-4.0%	0.26m	-11.4%	11.89	8.4%
Beef mince	£27.5	32.7%	2.91m	0.2%	9.45	32.4%
Beef roasting	£3.7	-9.4%	0.32m	-13.2%	11.68	4.4%
Beef steak	£21.8	11.1%	1.02m	-3.1%	21.34	14.6%
Beef stewing	£1.4	32.6%*	0.12m	19.1%*	11.59	11.3%*
 <b>Primary lamb</b>	<b>£7.0</b>	<b>22.8%</b>	<b>525.7k</b>	<b>15.5%</b>	<b>13.27</b>	<b>6.4%</b>
Lamb chop	£1.6	2.5%	102.4k	-14.8%	15.66	20.3%
Lamb steak	£1.4	27.5%	84.6k	24.6%	16.60	2.4%
 <b>Primary pig meat</b>	<b>£12.4</b>	<b>1.3%</b>	<b>1.88m</b>	<b>2.2%</b>	<b>6.61</b>	<b>-0.9%</b>
Pork chop	£1.5	14.9%	0.20m	7.2%	7.56	7.3%
Pork medallion	£1.0	-4.6%	0.11m	-9.9%	9.21	5.9%
Pork mince	£1.6	3.9%	0.30m	4.0%	5.26	-0.1%
Pork roasting	£2.0	-5.8%	0.37m	-7.9%	5.39	2.2%
Pork steak	£3.5	13.8%	0.51m	11.1%	6.98	2.4%

\*Low sample size, use with caution