





Retail Market Update

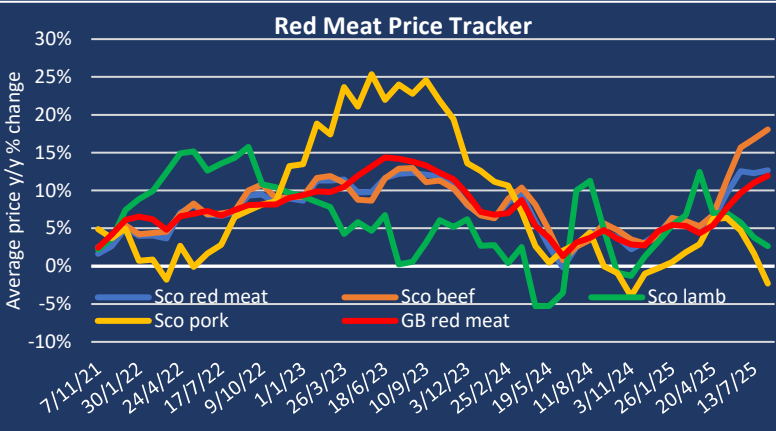
For the 12 weeks ending 10th August 2025
Data source: Worldpanel by Numerator UK,
primary red meat only

Scotland At A Glance

Total red meat	Beef	Lamb	Pork
			
Latest 12 weeks Spending +12.0% Volume -0.6% Avg price £/kg +12.7%	Latest 12 weeks Spending +17.5% Volume -0.5% Avg Price £/kg +18.1%	Latest 12 weeks Spending +3.0% Volume +0.3% Avg Price £/kg +2.7%	Latest 12 weeks Spending +0.8% Volume +3.2% Avg Price £/kg -2.3%

Scotland: Shoppers Remain Committed To Buying Beef, Lamb and Pork







Total spending on red meat in Scotland rose by 12% year-on-year, primarily driven by price inflation. Sales growth was recorded across beef, lamb and pork, with lamb and pork also achieving volume increases. Despite beef price inflation reaching 18%, overall demand remained firm. Beef mince held its position as a household staple with a volume growth of 2.8%, while beef stewing saw notable volume growth of 8.7%. Lamb also performed well, with lamb steak volumes increasing by 14% despite higher prices. Pork also saw volume gains, with pork steak, chop, mince and medallion all contributing to volume growth. Consumers seem to be willing to spend more on red meat, and the overall impact on volumes has been limited so far.



Price inflation

- Red meat price inflation in Scotland has accelerated in 2025, reaching 12.7% in August - slightly above GB level of 12% for the 12 weeks ending 10/8/25.
- Overall red meat price inflation is being driven primarily by beef. Scottish beef inflation has surged sharply since early 2025, now at around 18%, reaching a new high since the cost-of-living crisis in 2023.

Red meat cuts in Scotland

	 Spending Million £	Spending yoy	 Volume kg	Volume yoy	 £/kg	Average price yoy
 Primary beef	£56.7	17.5%	4.65m	-0.5%	12.18	18.1%
Beef diced	£3.3	18.7%	0.27m	4.7%	12.28	13.3%
Beef mince	£27.2	29.3%	3.00m	2.8%	9.09	25.7%
Beef roasting	£3.3	-20.0%	0.27m	-25.1%	12.17	6.8%
Beef steak	£21.4	14.2%	0.99m	-3.0%	21.61	17.7%
Beef stewing	£1.4	32.3%	0.11m	8.7%	12.38	21.7%
 Primary lamb	£6.4	3.0%	488.0k	0.3%	13.04	2.7%
Lamb chop	£1.4	-4.6%	94.7k	-18.5%	15.27	17.1%
Lamb steak	£1.5	19.1%	88.1k	14.1%	16.80	4.3%
 Primary pig meat	£12.4	0.8%	1.88m	3.2%	6.63	-2.3%
Pork chop	£1.5	15.3%	0.20m	9.0%	7.50	5.8%
Pork medallion	£1.1	29.7%	0.12m	21.5%	8.97	6.7%
Pork mince	£1.3	0.1%	0.26m	2.2%	5.23	-2.1%
Pork roasting	£1.9	-5.9%	0.35m	-4.3%	5.38	-1.6%
Pork steak	£3.6	8.2%	0.53m	6.9%	6.87	1.2%