





## Scotland at A Glance

Total red meat	Beef	Lamb	Pork
			
<b>Latest 12 weeks</b> Spending +12.3% Volume -3.2% Avg price £/kg +16.1%	<b>Latest 12 weeks</b> Spending +15.1% Volume -4.2% Avg Price £/kg +20.1%	<b>Latest 12 weeks</b> Spending +21.4% Volume +4.1% Avg Price £/kg +16.6%	<b>Latest 12 weeks</b> Spending -7.1% Volume -5.6% Avg Price £/kg -1.6%

## Scotland: Continued Strong Demand Despite a Mixed Picture Across Cuts

Total spending on red meat in Scotland continued to rise, increasing by 12.3% year on year, driven primarily by price inflation. Spending growth was observed across both beef and lamb, with lamb continuing to deliver volume growth. Despite rising prices, beef remained central to Scottish households' purchasing behaviour, accounting for 66.5% of total red meat volume.

Lamb continued to be a standout performer; however, the year-on-year volume uplift softened notably in March. This was mainly driven by a reduction in basket size, partially offset by an increase in the number of purchasing households. Despite this, lamb steak volumes continued to surge, rising by 116%, underlining consumers' strong appetite for premium cuts.



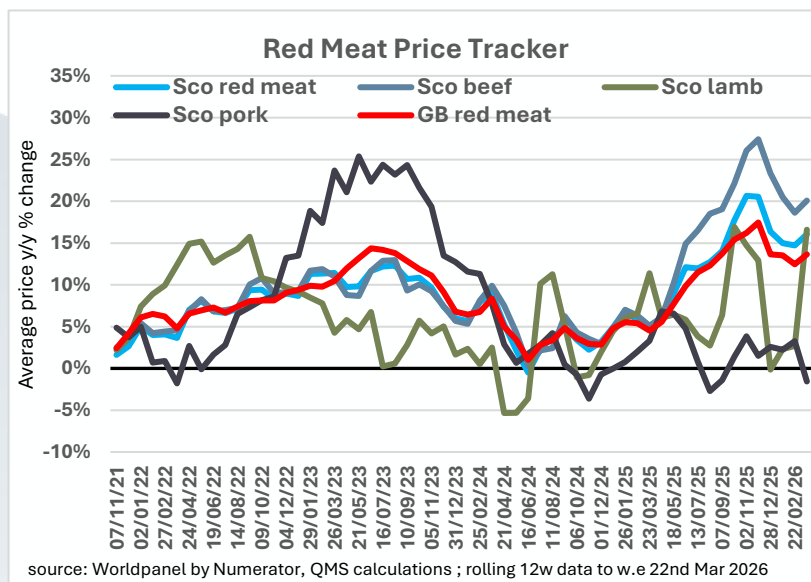
Primary pork declined overall in Scotland, with falls in both spending and volume. However, pork mince, the category's most versatile cut, benefited from its strong value proposition, with volumes increasing by nearly 12%. Pork roasting joints also saw strong growth, with volumes up 31%, reflecting consumers trading down from beef and lamb.







Overall, demand for quality red meat remains resilient, presenting a mixed picture: strong demand for premium cuts for special occasions, increasing substitution towards cheaper proteins for everyday meals, and large roasting joints that are heavily influenced by price and promotional activity. Scottish consumers appear to be less affected by price inflation than those across GB as a whole, highlighting the resilience of Scotland's red meat market.

## Price Inflation

Red meat price inflation in Scotland has rebounded recently following the impact of the Middle East conflict, but has eased since peaking in November 2025 and remains above the GB average.

Scottish red meat price inflation is mainly driven by beef, which is set to see year-on-year increases continue until at least autumn following last year's price surge, while there was a seemingly fast pass-through of higher farmgate lamb prices to retail level. By contrast, pork inflation remained relatively stable at a low level, reflecting softer market conditions at the farm gate.



	 Spending Million £	Spending yoy	 Volume kg	Volume yoy	 Avg prices £/kg	Avg price yoy	
	Primary beef	£64.6	15.1%	5.08m	-4.2%	12.72	20.1%
	Beef diced	£5.6	14.8%	0.45m	-3.2%	12.54	18.6%
	Beef mince	£30.8	26.0%	3.20m	-0.1%	9.61	26.1%
	Beef roasting	£5.0	-3.3%	0.37m	-21.0%	13.32	22.4%
	Beef steak	£21.6	10.3%	0.92m	-5.1%	23.54	16.3%
	Beef stewing	£1.4	-12.0%	0.12m	-25.1%	12.41	17.5%
	Primary lamb	£7.4	21.4%	485.6k	4.1%	15.26	16.6%
	Lamb chop	£1.2	-24.1%	74.6k	-28.8%	15.61	6.7%
	Lamb steak	£2.4	137.5%	125.9k	116.4%	18.78	9.8%
	Lamb roasting	£1.4	-7.7%	84.0k	-25.5%	17.15	23.8%
	Primary pig meat	£12.3	-7.1%	1.90m	-5.6%	6.46	-1.6%
	Pork chop	£1.4	-5.6%	0.18m	-8.0%	7.42	2.6%
	Pork medallion	£0.8	-32.8%	0.08m	-37.3%	10.02	7.1%
	Pork mince	£1.8	11.4%	0.36m	12.1%	5.09	-0.6%
	Pork roasting	£2.7	33.4%	0.50m	31.2%	5.48	1.7%
	Pork steak	£3.2	-16.9%	0.46m	-15.0%	6.85	-2.2%