





## Scotland at A Glance

Total red meat	Beef	Lamb	Pork
			
<b>Latest 12 weeks</b> Spending +13.4% Volume -0.1% Avg price £/kg +13.6%	<b>Latest 12 weeks</b> Spending +13.1% Volume -4.1% Avg Price £/kg +17.9%	<b>Latest 12 weeks</b> Spending +30.4% Volume +13.8% Avg Price £/kg +14.6%	<b>Latest 12 weeks</b> Spending +1.4% Volume +2.7% Avg Price £/kg -1.3%

## Scotland: Resilient Easter Demand Despite Ongoing Cost Pressures

Total spending on red meat in Scotland continued to rise, increasing by 13.4% year on year, driven primarily by price inflation. Volumes were broadly flat compared with last year, supported by growth in lamb and pork, which offset by a decline in beef sales.

Despite rising prices, beef remained central to Scottish households' purchasing behaviour, accounting for 63% of total red meat volume. Beef mince saw particularly strong performance, with volume increasing by 6.7%.

Lamb continued to be a standout performer, with the Easter season driving strong demand for lamb leg roastings. Lamb roasting volume increased by 19%, reflecting consumer willingness to protect key seasonal occasions, although some of this strength may reflect the timing of Easter, with Easter Sunday being the final day of the period being compared against in 2025. Lamb steak volumes continued to surge, rising by 87%, underlining consumers' strong appetite for premium cuts.



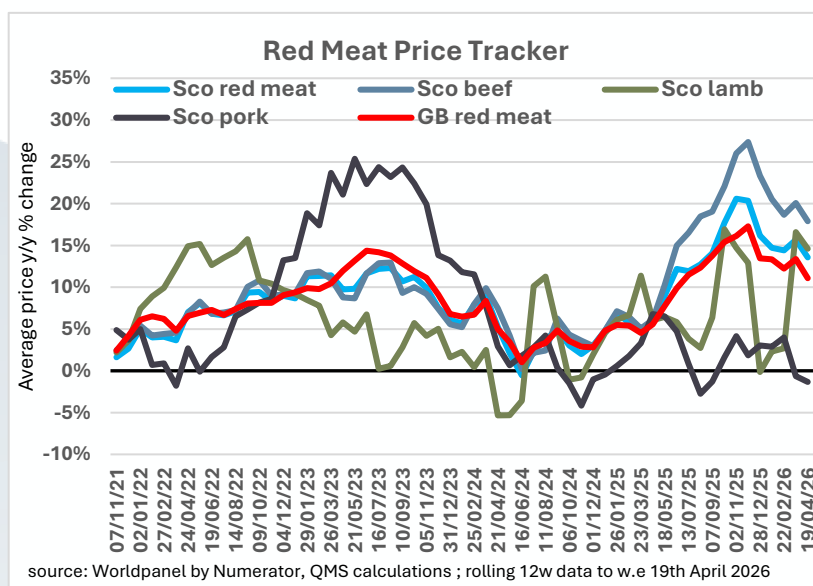
Primary pork sales increased in Scotland in both spending and volume, benefiting from its strong value proposition. Pork mince, the category's most versatile cut, saw volume growth of 12%. Pork roastings also performed strongly, with volumes rising by nearly 48%, supported by seasonal demand and indicating some consumer trade-down from beef and lamb.

Despite ongoing cost pressures, consumers continued to prioritise key celebratory occasions such as Easter, demonstrating a willingness to protect spend on traditional centrepiece products, with lamb roasting joints performing particularly strongly. However, there were clear signs of cautious spending behaviour, with a noticeable shift towards more affordable alternatives such as pork roastings. In addition, favourable weather in early April created incremental trading opportunities for BBQ occasions, which likely supported increased demand for grilling products, particularly mince for burgers.

## Price Inflation

Red meat price inflation in Scotland eased in April, following a softening trend 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	£64.3	13.1%	5.11m	-4.1%	12.57	17.9%
Beef diced	£4.2	2.1%	0.33m	-13.4%	12.58	17.9%
Beef mince	£31.6	32.2%	3.28m	6.7%	9.64	23.8%
Beef roasting	£6.5	-4.1%	0.52m	-27.7%	12.66	32.6%
Beef steak	£20.6	3.1%	0.87m	-11.0%	23.66	15.8%
Beef stewing	£1.2	-20.6%	0.09m	-33.5%	12.62	19.3%



Primary lamb	£10.4	30.4%	772.2k	13.8%	13.41	14.6%
Lamb chop	£1.5	4.6%	91.9k	-4.0%	16.02	8.9%
Lamb steak	£2.3	105.8%	123.7k	87.1%	18.91	10.0%
Lamb roasting	£4.4	34.9%	375.9k	19.0%	11.82	13.4%



Primary pig meat	£13.3	1.4%	2.06m	2.7%	6.48	-1.3%
Pork chop	£1.4	4.3%	0.19m	-3.0%	7.62	7.6%
Pork medallion	£0.9	-29.3%	0.09m	-33.3%	10.14	6.0%
Pork mince	£1.8	10.9%	0.35m	12.3%	5.12	-1.3%
Pork roasting	£3.0	47.9%	0.55m	47.7%	5.40	0.2%
Pork steak	£3.5	-4.3%	0.50m	-5.6%	6.98	1.5%