





## Scotland at A Glance

Total red meat	Beef	Lamb	Pork
			
<b>Latest 12 weeks</b> Spending +12.3% Volume +1.3% Avg price £/kg +10.9%	<b>Latest 12 weeks</b> Spending +13.6% Volume -1.6% Avg Price £/kg +15.5%	<b>Latest 12 weeks</b> Spending +16.1% Volume +3.3% Avg Price £/kg +12.4%	<b>Latest 12 weeks</b> Spending +2.4% Volume +5.5% Avg Price £/kg -3.0%

## Scotland: Volume Recovery and Signs of Beef Price Declining

Total spending on red meat in Scotland remained elevated compared with last year, with an increase of 13.4%, driven primarily by price inflation. Notably, volumes increased by 1.3% year-on-year after a prolonged period of lagging behind, supported by growth in lamb and pork, which offset by a decline in beef sales.

Beef average prices started to decline across all cuts in May, with inflation level trending down. Beef remained central to Scottish households' purchasing behaviour, accounting for 62.4% of total red meat volume. Beef mince saw particularly strong performance, with volume increasing by 7.1%, suggesting a trading-down behaviour within the category.



Lamb continued to be a strong performer, with lamb steak volumes remaining elevated at a significant higher level, rising by 46.4%, underlining consumers' strong appetite for premium cuts.

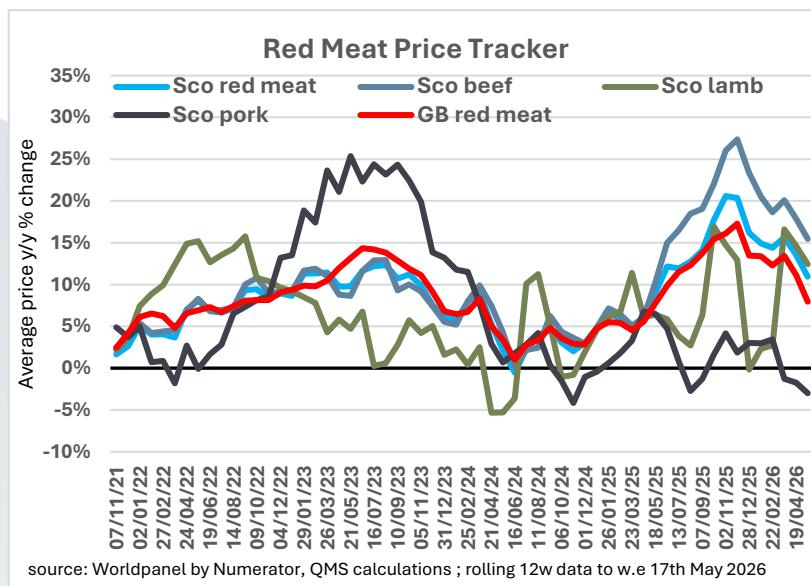
Primary pork sales increased in Scotland in both spending and volume, benefiting from its strong value proposition. Pork mince, the category's most versatile cut, saw volume growth of 18%. Pork roastings also performed strongly, with volumes rising by nearly 43%, supported by seasonal demand and indicating some consumer trade-down from beef and lamb. Pork chops appeared to be a top runner within the category as summer approaching, recording a volume increase of 27%.

Despite ongoing cost pressures, demand for red meat remained strong. However, there were clear signs of cautious spending behaviour, with a noticeable shift towards more affordable alternatives. In addition, favourable weather in May created incremental trading opportunities for BBQ occasions, which likely supported increased demand for grilling products.

## Price Inflation

Red meat price inflation in Scotland continued to dip in May, following a softening trend since peaking in November 2025 and remains above the GB average.

All three sectors saw inflation levels soften in May in Scotland. Despite continued declines, Scottish beef inflation remained elevated compared to its peak in 2026. Meanwhile, higher farmgate lamb prices continued to support a relatively high level of lamb price inflation. 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	£62.3	13.6%	4.98m	-1.6%	12.51	15.5%
Beef diced	£3.6	5.8%	0.29m	-6.4%	12.43	13.1%
Beef mince	£30.7	28.9%	3.22m	7.1%	9.54	20.4%
Beef roasting	£5.8	-4.0%	0.47m	-24.7%	12.25	27.6%
Beef steak	£20.9	3.8%	0.89m	-8.9%	23.56	14.0%
Beef stewing	£1.1	-1.5%	0.09m	-12.0%	12.05	12.0%



Primary lamb	£9.6	16.1%	729.9k	3.3%	13.16	12.4%
Lamb chop	£1.3	6.2%	81.9k	-2.5%	16.16	8.9%
Lamb steak	£2.2	65.4%	114.9k	46.4%	18.84	13.0%
Lamb roasting	£4.2	13.9%	364.7k	4.5%	11.60	9.1%



Primary pig meat	£13.3	2.4%	2.10m	5.5%	6.35	-3.0%
Pork chop	£1.5	33.3%	0.20m	27.3%	7.43	4.7%
Pork medallion	£0.9	-44.0%	0.09m	-45.5%	9.82	2.8%
Pork mince	£1.9	15.9%	0.37m	18.3%	5.09	-2.0%
Pork roasting	£2.9	45.1%	0.56m	43.1%	5.13	1.4%
Pork steak	£3.4	-7.5%	0.49m	-10.7%	6.96	3.6%