

Scotland at A Glance

Total red meat	Beef	Lamb	Pork
			
Latest 12 weeks Spending +12.5% Volume +2.4% Avg price £/kg +9.8%	Latest 12 weeks Spending +14.0% Volume -0.1% Avg Price £/kg +14.1%	Latest 12 weeks Spending +8.4% Volume -0.4% Avg Price £/kg +8.8%	Latest 12 weeks Spending +3.9% Volume +6.2% Avg Price £/kg -2.2%

Scotland: Red Meat Demand Remains Robust as BBQ Season Boosts Sales

Total spending on red meat in Scotland remained elevated compared with last year, with an increase of 12.5%, driven primarily by price inflation. Notably, volumes increased by 2.4% year-on-year after a prolonged period of lagging behind, supported by growth in pork, which offset by a slight decline in beef and lamb sales.

Beef remained central to Scottish households' purchasing behaviour, accounting for 62.6% of total red meat volume. While beef mince continued to see year-on-year growth, beef steak recorded a volume increase of 4%, possibly benefitting from a higher number of BBQ occasions. In addition, it is notable that beef steak average prices have started to decline, down by 69p/kg compared with May.

Lamb turned into a year-on-year volume decline, as the surge in lamb steak volumes began to cool and roasting joints entered their usual seasonal dip. However, grilling occasions continued to support the sales of lamb chops and lamb steaks, with a volume increase of 8.5% and 5.1% respectively.

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 25%. Pork roastings also performed strongly, with volumes rising by nearly 38%, supported by seasonal demand and indicating consumer trade-down from beef and lamb. Pork chop, as a popular cut for summer, appeared to be a top runner within the category, recording a volume increase of nearly 30%.

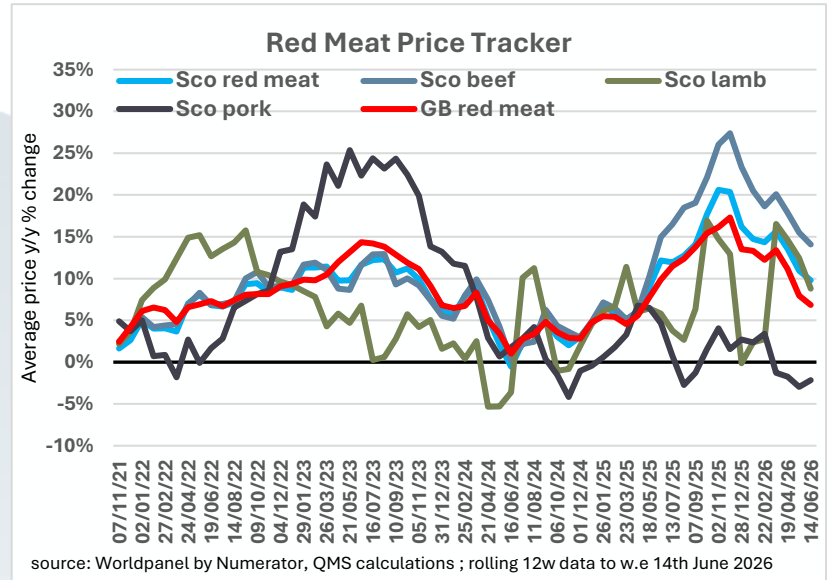
Despite ongoing cost pressures, demand for red meat remained strong, supported by warmer weather and the World Cup. However, consumers continued to seek value, with signs of trading down to more affordable options. BBQ occasions also boosted sales of popular grilling cuts such as beef burger and beef steak. Looking ahead, the Commonwealth Games are expected to provide further support for red meat consumption in Scotland, therefore increasing trading opportunities.



Price Inflation

Red meat price inflation in Scotland continued to dip in June, following a softening trend since peaking in November 2025 and remains above the GB average. Scottish red meat prices were 21.4% above August 2023 levels when COL reached its inflation peak.

Despite continued declines, Scottish beef inflation remained elevated compared to its peak in 2023. 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	£63.0	14.0%	4.91m	-0.1%	12.83	14.1%
Beef diced	£3.9	17.8%	0.32m	11.3%	12.21	5.8%
Beef mince	£29.0	17.9%	3.02m	1.3%	9.61	16.4%
Beef roasting	£5.9	7.7%	0.47m	-15.7%	12.44	27.7%
Beef steak	£23.0	11.9%	1.01m	4.0%	22.87	7.7%



Primary lamb	£8.9	8.4%	690.2k	-0.4%	12.90	8.8%
Lamb chop*	£1.5	20.8%	91.5k	8.5%	16.41	11.3%
Lamb steak	£1.7	11.8%	96.1k	5.1%	18.08	6.4%
Lamb roasting	£3.9	5.0%	349.0k	-1.8%	11.24	6.9%
Lamb mince*	£0.9	4.4%	67.9k	-5.0%	12.95	9.9%



Primary pig meat	£13.1	3.9%	2.04m	6.2%	6.41	-2.2%
Pork chop	£1.6	36.1%	0.22m	29.9%	7.59	4.7%
Pork medallion	£0.7	-46.0%	0.08m	-47.0%	9.81	2.0%
Pork mince	£1.8	21.1%	0.35m	25.1%	5.09	-3.2%
Pork roasting	£2.6	41.1%	0.50m	38.3%	5.09	2.0%
Pork steak	£3.4	-9.9%	0.49m	-14.2%	6.97	5.0%

*Low sample size, use with caution