QMS Quarterly Cattle Supply Update Q2 2026

Purpose:

To provide an update on cattle supply in Scotland based on the latest cattle population data from April 2026.

Prepared By:

Iain Macdonald, Market Intelligence Manager

Contact: imacdonald@qmscotland.co.uk

Date: 16/07/2026

Quality Meat Scotland is a Non-Departmental Public Body. This advice is freely available and further information can be provided by the designated contact above.

Summary of Key Points

- Continuing low slaughter at the start of 2026 supported prime cattle availability in Scotland in the spring of 2026, with the rate of increase in the number of males and beef-sired females aged 12-30 months doubling to 1.6% from a year earlier. After a period of stability over the winter, the key demographic of 18-24 months showed an increase, of 2%. Meanwhile, having remained tight as the year began, numbers of older prime cattle showed a rebound, up 1.3%. There were also increased supplies at 12-18 months, up 1.4%, which should support availability in the second half of the year.

- At GB level, the year-on-year decline in numbers aged 12 to 30 months softened further in spring 2026, but the short-term market impact was much tighter, with a 1.5% reduction at 18-24 months and a 4.7% reduction at 24-30 months, reflecting significant declines in England & Wales. However, a 1.8% uplift at 12-18 months will eventually provide offsetting support.

- In theory, increased calf numbers should lead to softer competition at store sales, but this has not been the case so far in 2026, with auction volumes remaining tight and prices holding at similar levels to 2025. This could reflect the shifting balance of production, with suckler-bred calves remaining in tight supply, and beef-sired dairy calves often being managed in specific supply chains rather than traded at store sales.

- Under-30-month slaughter fell much faster than expected based on population data in 2025, signalling lower slaughter rates across GB, though to a lesser extent in England than in Wales or Scotland. If slaughter rates were to partially rebound in 2026, there could be a small increase in kill, modelled at under 1% in Scotland. However, a reduced heifer kill, potentially as producers look to stabilise herds, is sustaining downwards pressure on the slaughter rate, limiting the recovery. A frontloaded marketing profile in 2025 is also clouding the picture.

- In 2025, a further small reduction in the net outflow of cattle born in Scotland limited the overall decline in kill at Scottish abattoirs. However, the outflow remained elevated well above pre-2022 levels, and it widened again at the start of 2026, driven by a jump in moves directly to slaughter of more than a third compared to Q1 2025. Moves to English farms and auctions continued to fall back from their 2022 peak but remain elevated. Meanwhile, slaughter of cattle born in England & Wales at Scottish abattoirs fell to a new low in Q1 2026.

- In April 2026, there were 386,300 beef-sired females aged 30 months and over on Scottish holdings. This was a 1.5% decline from a year earlier, which was the smallest reduction seen since July 2022. ScotEID cattle population data for early-June 2026 suggests that the rate of decline has softened further, easing to around the 1% mark.

- For a further slowdown in the rate of herd decline, we will need stronger momentum than has been the case since mid-2025, although after three quarters of year-on-year declines in beef-sired females aged 24-30 months, they did show a renewed uplift in April, potentially supporting the herd during the breeding season.

- While also softening, the decline in the suckler herd in England & Wales has continued to outpace Scotland, with a 2.4% reduction in beef-sired females over 30 months in April.

- Reflecting a market downturn, Scotland's dairy herd moved into contraction at the start of 2026 after two years of growth, with the rate of decline accelerating to -1.4% by April. Meanwhile, the rate of contraction in the dairy herd in England & Wales moved beyond the 2% mark. Dairy sector change is likely to begin having an impact on prime cattle supplies in 2028.

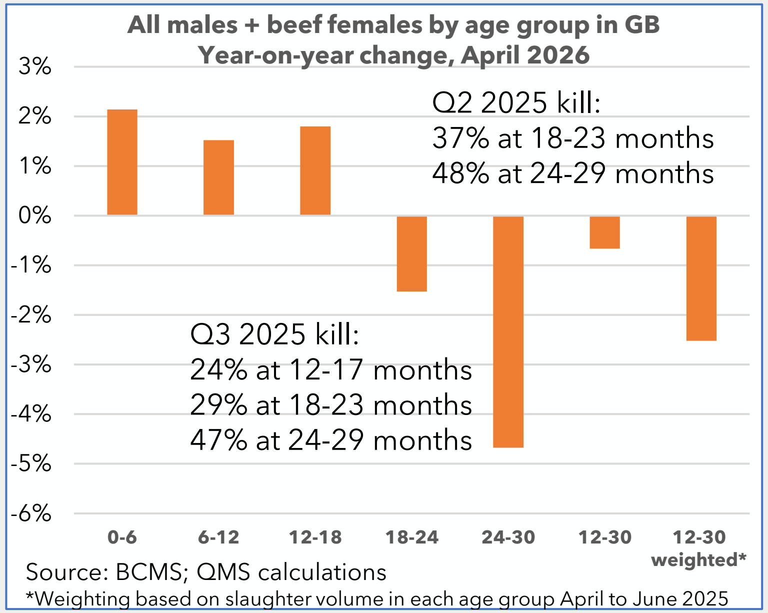
- Overall UK beef import volumes remained stable relative to year-earlier levels in the first five months of 2026 whereas exports showed significant growth, signalling soft domestic demand.

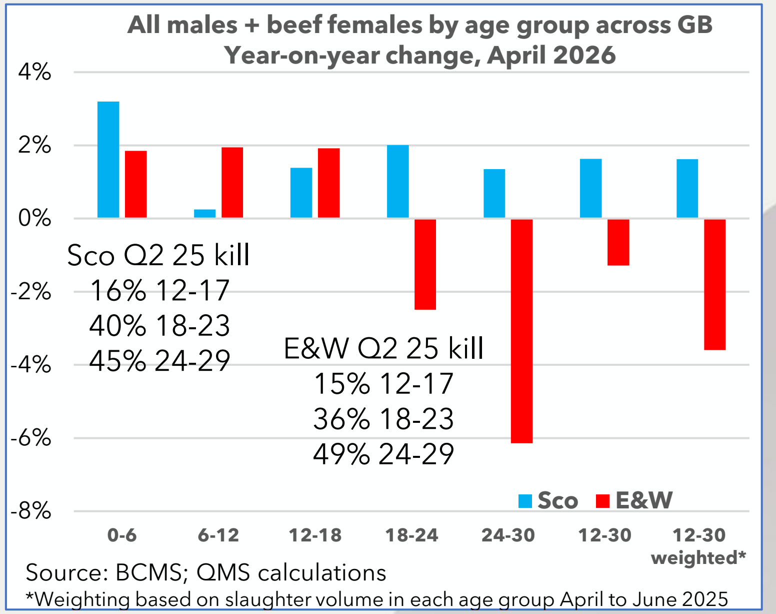
- Non-EU import penetration continued to hold at 25-30% of total volumes, averaging 5,600t per month between July 2025 and April 2026. Despite this substantial rebalancing, the Irish Republic remained the dominant supplier in the first five months of 2026, accounting for 64% of deliveries, although this was down from 74% a year earlier. New Zealand has become the second largest supplier, accounting for 12% of imports at the start of 2026, ahead of Australia on 8%. Average import prices from NZ were significantly lower than those from Australia, likely signalling a bias towards imports of manufacturing grade beef rather than higher value cuts.

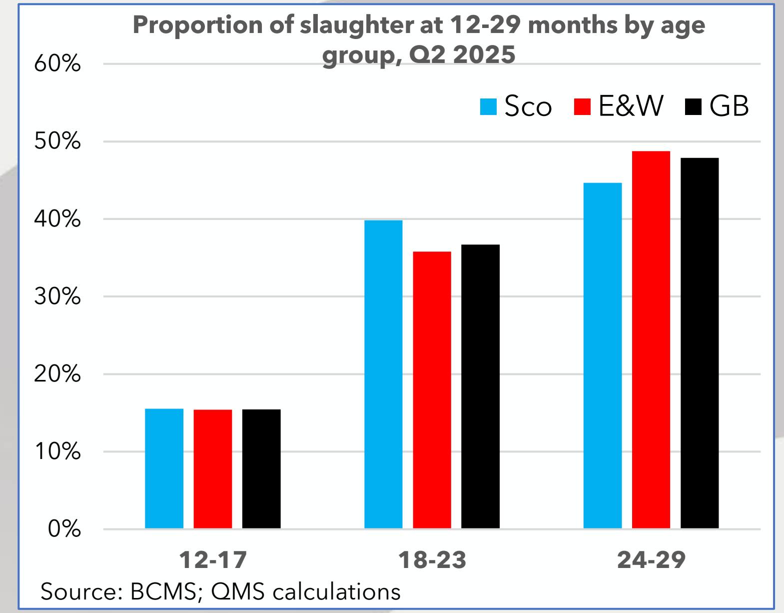
- Looking at the key Meating Our Potential metrics, on a red, amber, green scale, beef cow numbers have been rated as red, while productivity has been rated green, and the outflow has been rated as amber. Beef cow numbers and productivity appear to have shown further improvement at the start of 2026 but there has been an increased outflow of cattle directly to slaughter.

* Please note, population figures for under-30-month cattle are based on all males and beef-sired females. Dairy females are excluded.

Prime Cattle Availability – improved availability in Scotland while E&W remains tight







Continuing low slaughter in Q1 2026 supported prime cattle availability in Scotland in the spring, with the year-on-year increase in the number of cattle aged 12-30 months doubling from January to reach 1.6%. Numbers were up 2% in the key 18-24-month demographic, having been stable over the winter. Meanwhile, having remained tight as the year began, older prime cattle reversed into increase in April, up 1.3%. There were also increased supplies at 12-18-months (+1.4%), which should provide some continuing support to supplies in the second half. Weighted for slaughter in Q2, the overall prime cattle population was up by 1.6%.

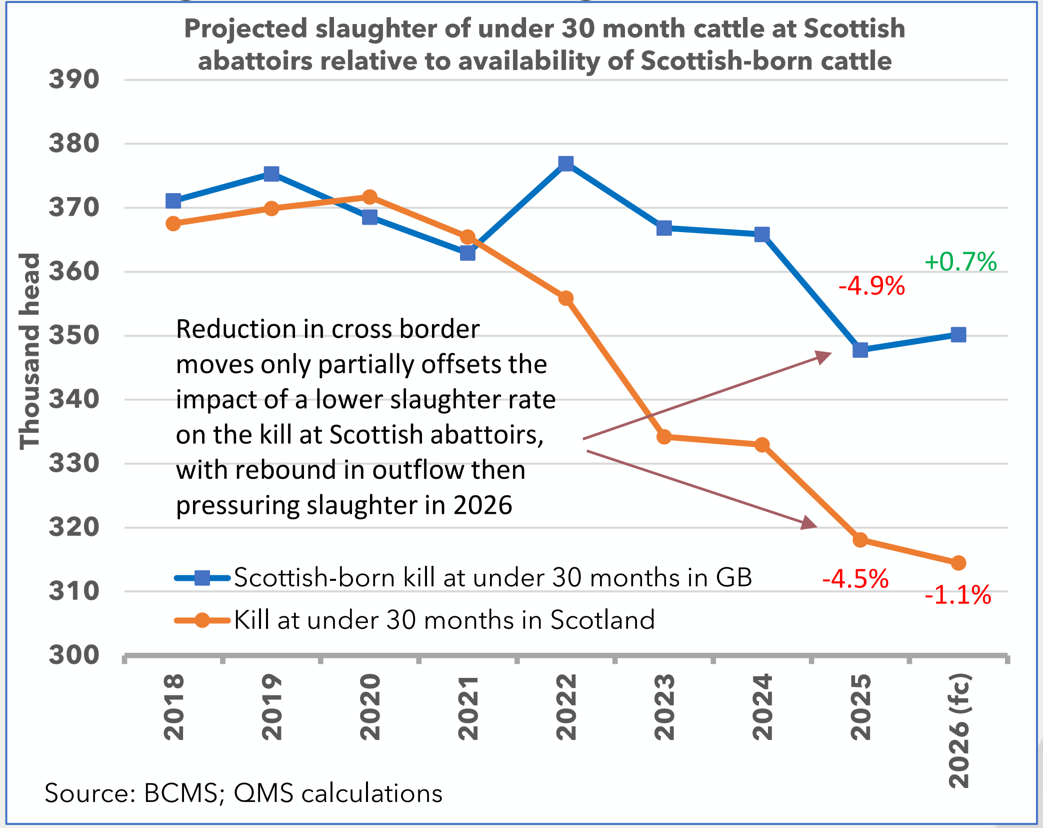
Looking ahead to the second half, availability looks set to continue running slightly higher than a year earlier in Scotland.

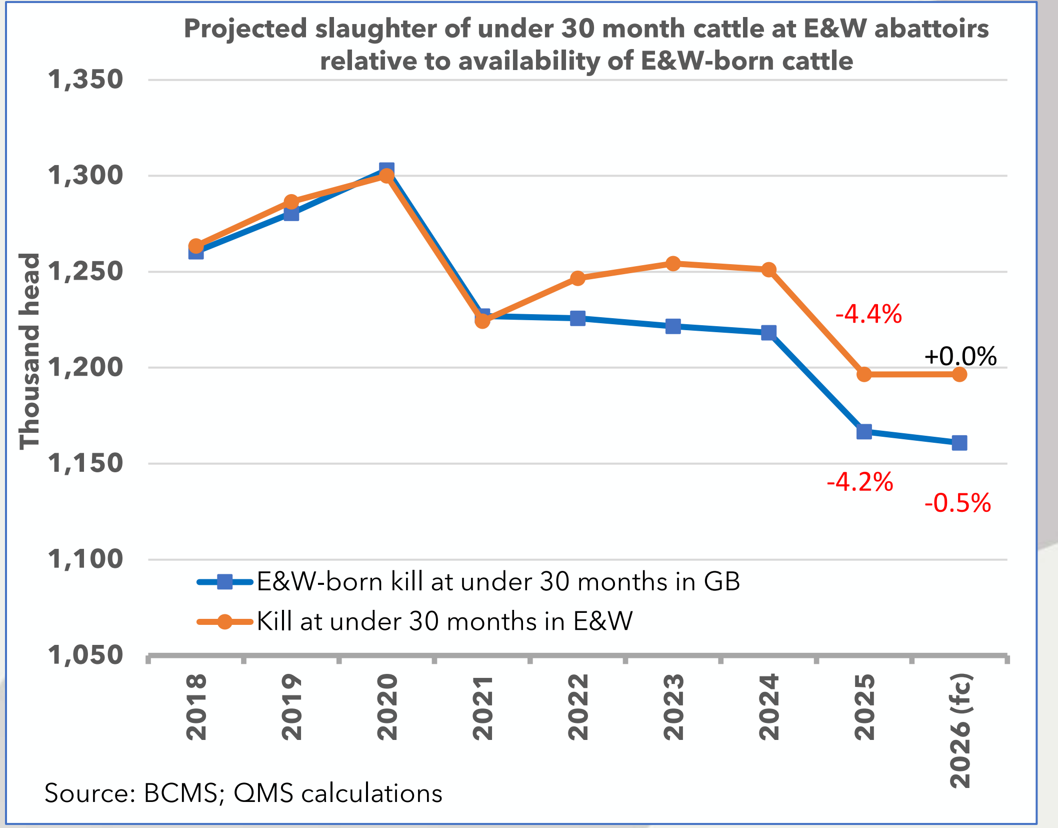
At GB level, the year-on-year decline in numbers aged 12 to 30 months slowed further in April, to 0.7%, down from around -3% in spring and summer 2025. However, numbers were tight in the key slaughter age groups, with 18-24 months down 1.5% and 24-30 months down by nearly 5%, with a 1.8% uplift at 12-18 months likely to eventually provide some offsetting support.

As the year progresses, some offsetting support to availability for slaughter should come from the stronger 2025 calf crop across GB, supported by lower mortality in spring 2025, and this should help supplies to improve by the year-end, although older prime cattle could remain tight south of the border.

In theory, increased calf numbers should lead to softer competition at store sales, but this has not been the case so far in 2026, with auction volumes remaining tight and prices holding at similar levels to 2025. This could reflect the shifting balance of production, with suckler-bred calves remaining in tight supply, and beef-sired dairy calves often being managed in specific supply chains rather than traded at store sales.

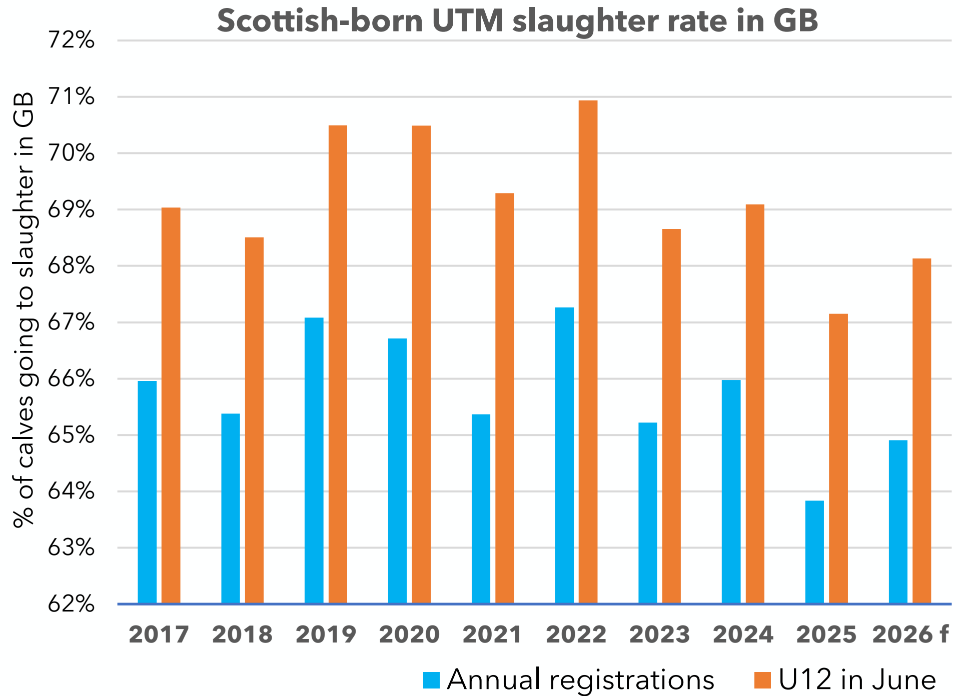
Projected slaughter of cattle aged under 30 months at Scottish abattoirs in 2025 and 2026



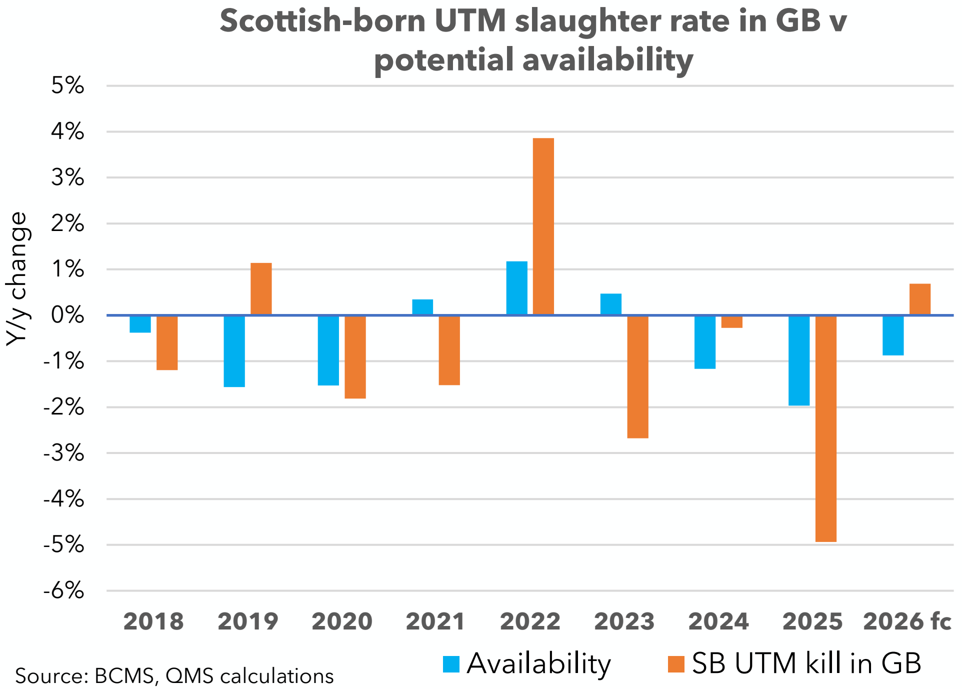


- Starting point: average of previous two years' calf crops
- Slaughter rates fell back sharply in Scotland and Wales in 2025, and more modestly in England. The general reduction was influenced by a lower volume of demand following the surge in consumer prices, plus there had been increased slaughter rates in 2024.
- For 2026, a partial rebound in slaughter rates has been factored in, as the volume of demand begins to slowly recover but farmers move towards stabilising herds. While a lower kill in the first half may signal the lack of a rebound in slaughter rate, last year's slaughter profile was front-loaded, complicating the forecasting process.
- To estimate the kill at Scottish abattoirs, cross-border slaughter rates relative to calf crops in Scotland, England and Wales have been adjusted following changes in moves during Q1 2026. As a result of a larger net outflow, the forecast kill at Scottish abattoirs now shows a 1% decline while numbers stabilise in E&W.

Slaughter rates



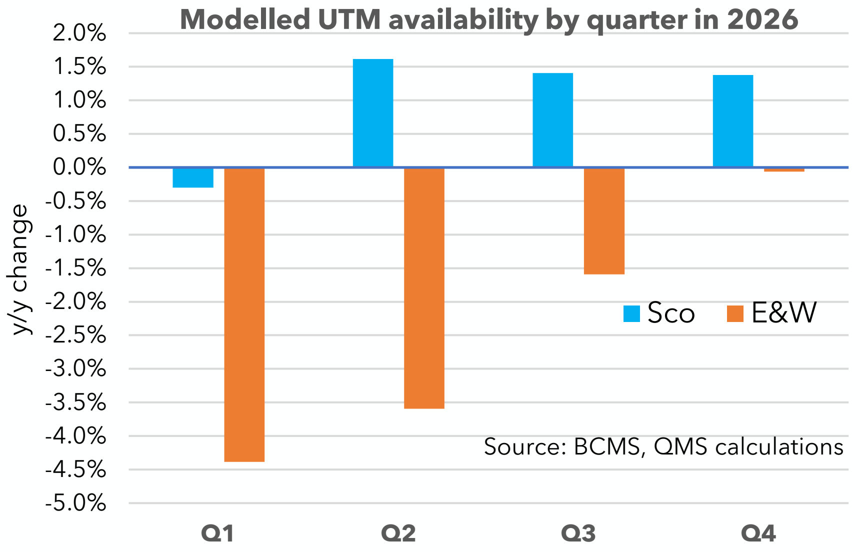
Source: BCMS, QMS calculations
Slaughter of Scottish-born UTM cattle relative to the average of the previous two years' calf crops



Source: BCMS, QMS calculations
Availability is a simplified estimate of slaughter availability based on the average of the previous two years' calf crops – useful for looking at the y/y change. Forecast slaughter rate in 2026 is based on the average of 2024 and 2025 slaughter rates.

- Slaughter rates fell by around two percentage points in 2025
- If they were to return to a long-term average level in 2026, Scottish-born UTM slaughter could rise by 2.3%
- SB UTM slaughter in GB fell by 5% in 2025 compared to a 2% reduction in the modelled calf crop (note: modelled calf crop from which slaughter animals are drawn from in 2025 is the average of the 2023 and 2024 calf crops)
- In 2026, the modelled calf crop is 1% lower than in 2025
- A partial rebound in slaughter rate could support a small increase in kill of less than 1% in 2026, while an unchanged low rate could see a near-1% reduction. Weak slaughter in the first half points towards the latter so far.
- Offsetting a potential rebound in slaughter rate could be a move towards heifer retention – this has been signalled in the price reporting data with the heifer share consistently lower y/y between mid-2025 and mid-2026
- A change in cross-border movements could result in a variation between the Scottish-born kill in GB and the kill in Scotland, and a higher net outflow has placed downwards pressure on slaughter at Scottish abattoirs in 2026 (see page 10).

Prime Cattle Slaughter in 2026 – modelled quarterly availability profile based on the April population data and quarterly slaughter by age group in 2025



Simplified model where y/y change in population by age group is adjusted by the quarterly share of slaughter in the previous year at 12-17, 18-23 and 24-29 months. Q2 2026 population groups projected forward through 2026 – e.g. projected Q3 2026 18-24-month group based on average of 12-18 and 18-24 groups in Q2, Q4 2026 18-24 group based on Q2 group aged 12-18 months.

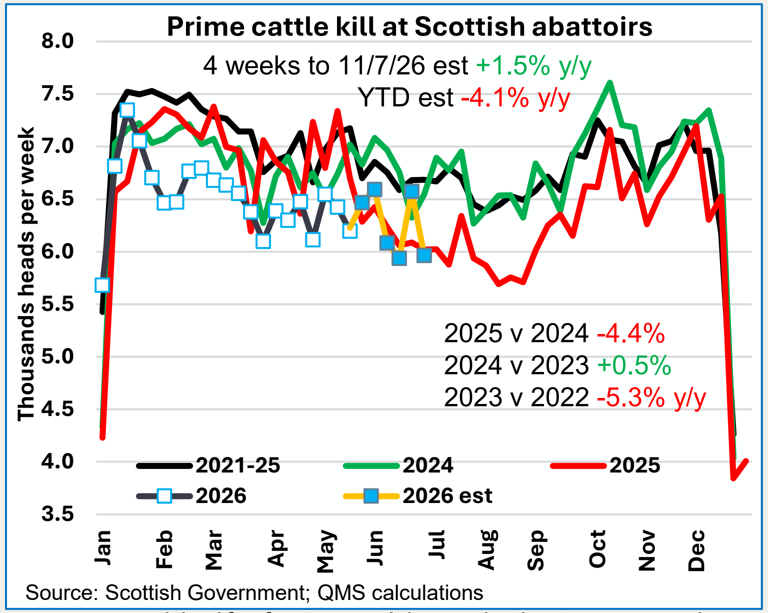
- As a guide to seasonal supplies in 2026, quarterly availability has been projected forward through 2026 from the April population by age group based on a simplified model using the main age groups and their share of slaughter at under 30 months by quarter in 2025. For example, in Q3 2026, the projected year-on-year change in the pool of cattle aged 18-24 months is based on the average of the year-on-year changes in those aged 12-18 and 18-24-months in April 2026, while the change in the 12-18-month pool in April becomes the change in the 18-24-month pool in October. Please note that this modelling does not account for fluctuations in cross-border movements or adjustments to slaughter rates.

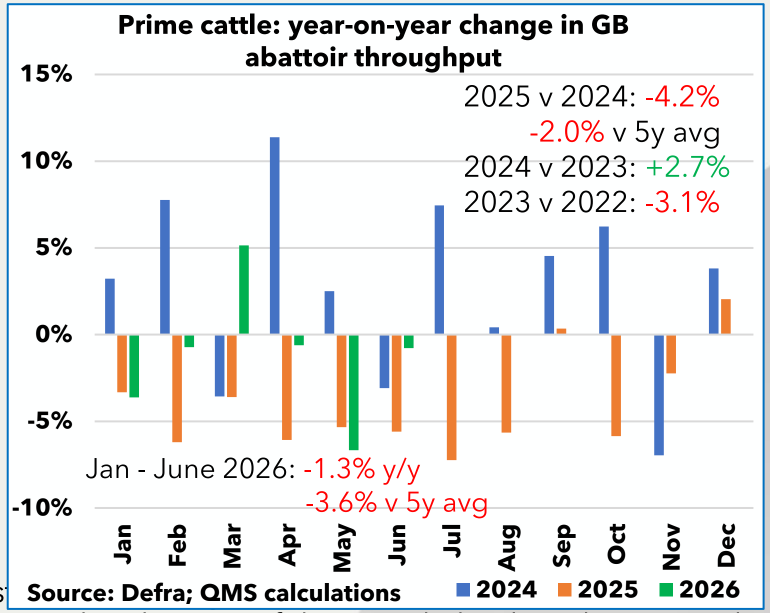
- This simplified modelling points to availability for slaughter running around 1.5% above year earlier levels in Scotland in the second half.

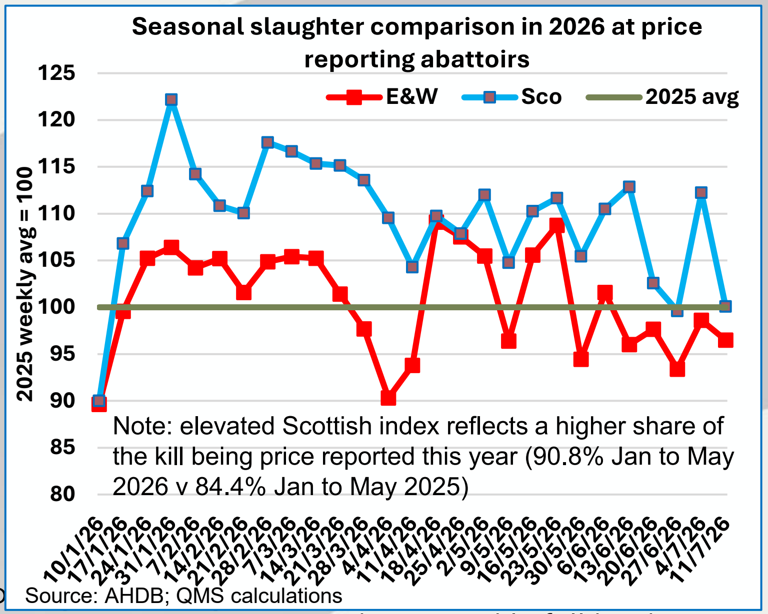
- In England & Wales, numbers continue to look tight in Q3, but to a lesser degree than in the first half, before stabilising in Q4 as the bulk of the older prime cattle from the first half of 2026 which were in very short supply will have already been processed or added to the herd, while the decline in the 18-24-month group in April (effectively the 24-30-month group in October) begins to be offset by increased supplies of younger cattle.

- Nevertheless, availability looks set to remain tighter in England & Wales than in Scotland as the important group aged 18-24 months in April was up 2% year-on-year in Scotland while being down 2.5% south of the border.

Prime cattle slaughter in 2026 – seasonal tightening underway but there is the potential for year-on-year increases due to the low kill of summer 2025

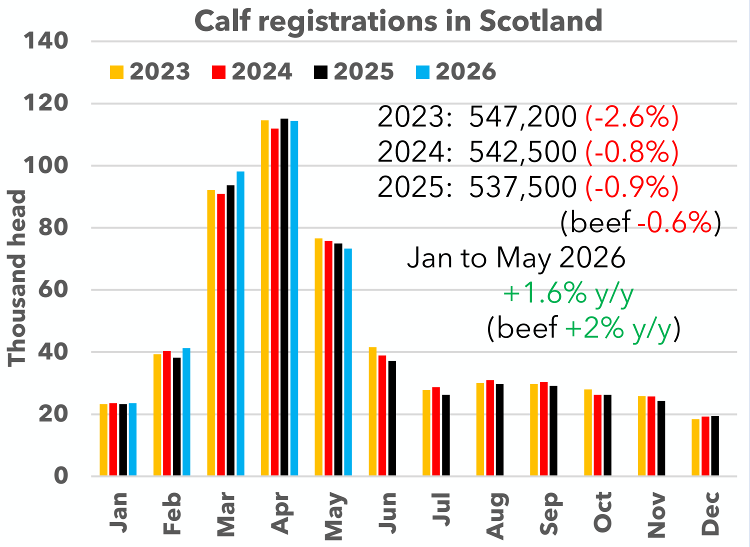




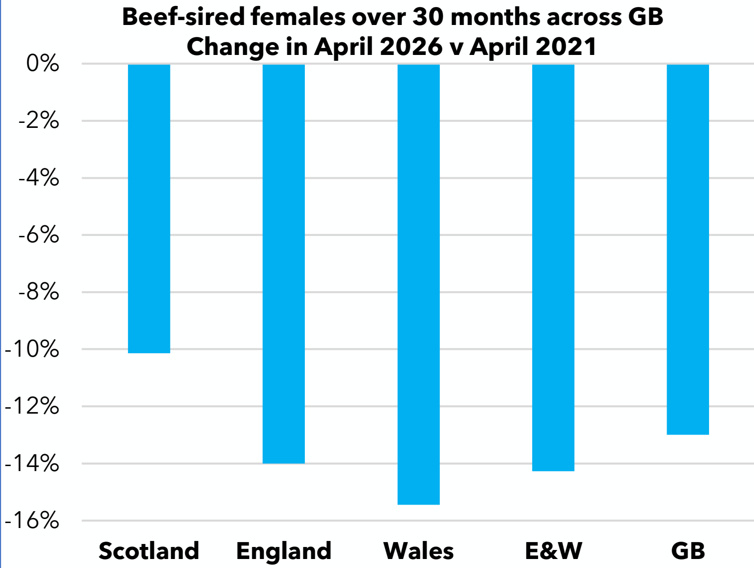


- Eas … a fo … second half of June. Although there was a sharp rebound at the turn of the month, back to the top end of its range since Easter, numbers quickly fell back to around where they had been at the Highland Show, with the four-week average at its lowest since mid-January, indicating that the seasonal summer slowdown is underway.
- In England & Wales, the weekly price reports point to seasonal strength in weekly slaughter between Easter and the end of May, with numbers tightening in June.
- Based on seasonal trends, estimated slaughter in the first half at Scottish abattoirs has been consistent with an annual slaughter level around 0.7% lower than in 2025, despite being down by around 4% midway through the year. This reflects the frontloaded slaughter profile in 2025.
- However, while throughput is down significantly, prime beef production has fallen more slowly due to increased carcase weights. Scottish Government slaughter data highlights a 2.9% year-on-year increase in the average prime cattle carcase weight in the first five months of 2026.
- It should be highlighted that strength in the deadweight price reporting sample in 2026 has not been fully repeated in the QMS levy returns. Any cattle bought at auctions, flat-rate purchases and contract kill are excluded from deadweight price reporting, so a jump of around six percentage points in the reported prime kill in 2026 is interesting, suggesting structural change within the sector.
- South of the border, the deadweight price reported kill only fell marginally in 2025 against a significant reduction in the overall prime cattle kill reported by Defra (-3.7%), highlighting a further shift towards deadweight price reporting. However, changes in deadweight numbers have been closer to Defra's slaughter survey in 2026, suggesting a stabilisation in the price reporting sample.

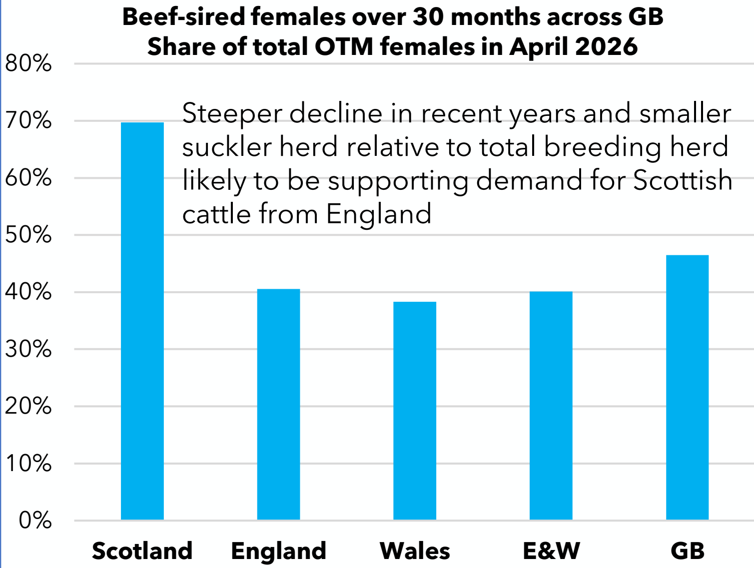
Drivers of prime and store cattle availability and demand in Scotland



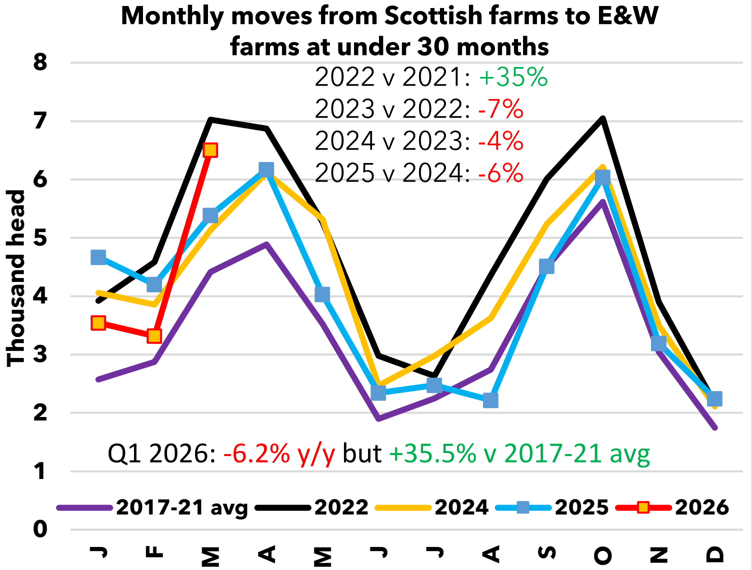
Source: BCMS; ScotEID; QMS calculations
Figures often revised slightly higher in next monthly report



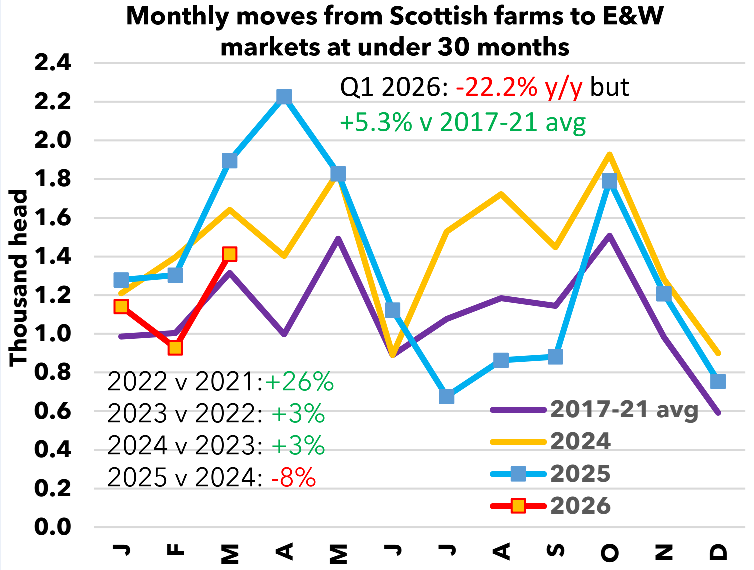
Source: BCMS; QMS calculations



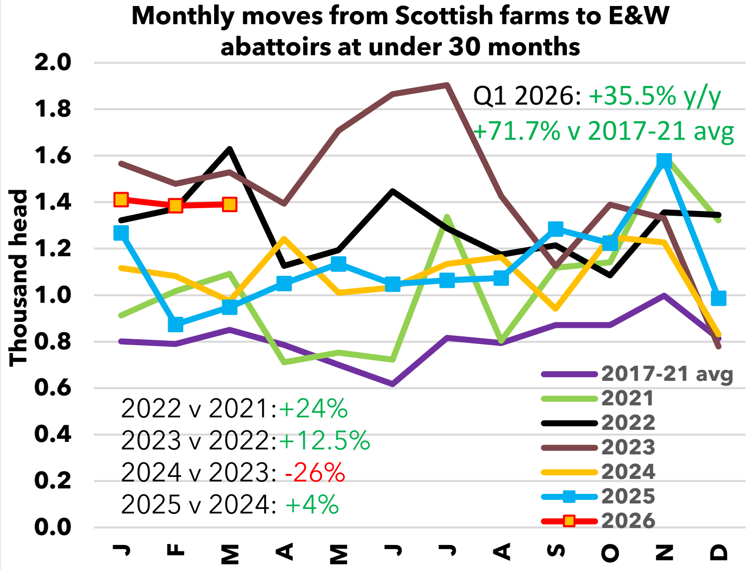
Source: BCMS; QMS calculations



Source: BCMS; QMS calculations



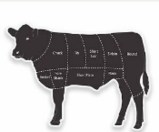
Source: BCMS; QMS calculations



Source: BCMS; QMS calculations

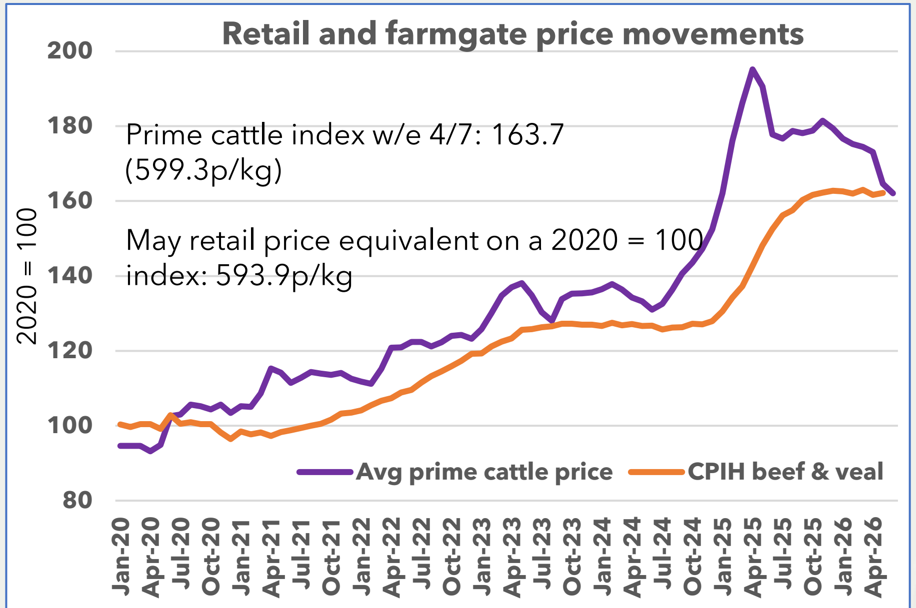
Please note that some animals moving to farms in England & Wales are effectively slaughter moves, with only a small number of days between move and slaughter

Drivers of prime cattle demand in Scotland



BEEF
12 weeks to 14 June 2026

	GB		Scotland	
	Actual	% change y/y	Actual	% change y/y
Value (£m)	634.1	8.3%	63.0	14.0%
Volume (t)	51,157	-3.5%	4,910	-0.1%
Avg price (£/kg)	12.40	12.3%	12.83	14.1%
Penetration*	63.8%	-1.7%	67.8%	-1.2%
Frequency**	4.3	-1.0%	4.3	2.8%

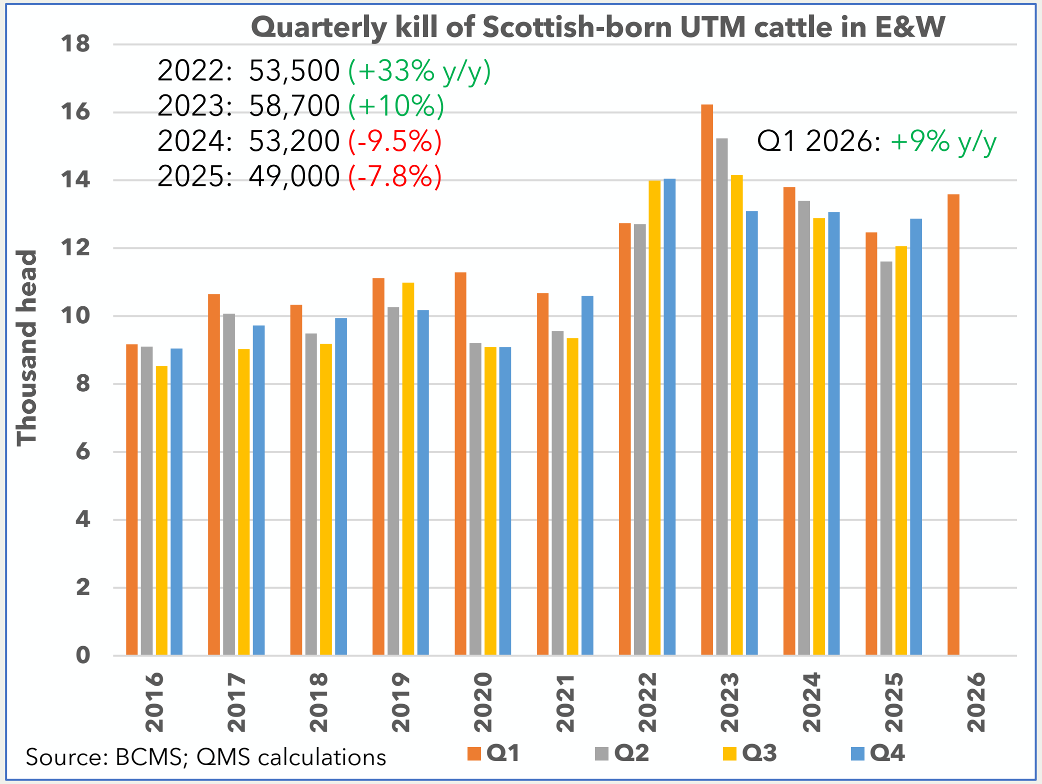


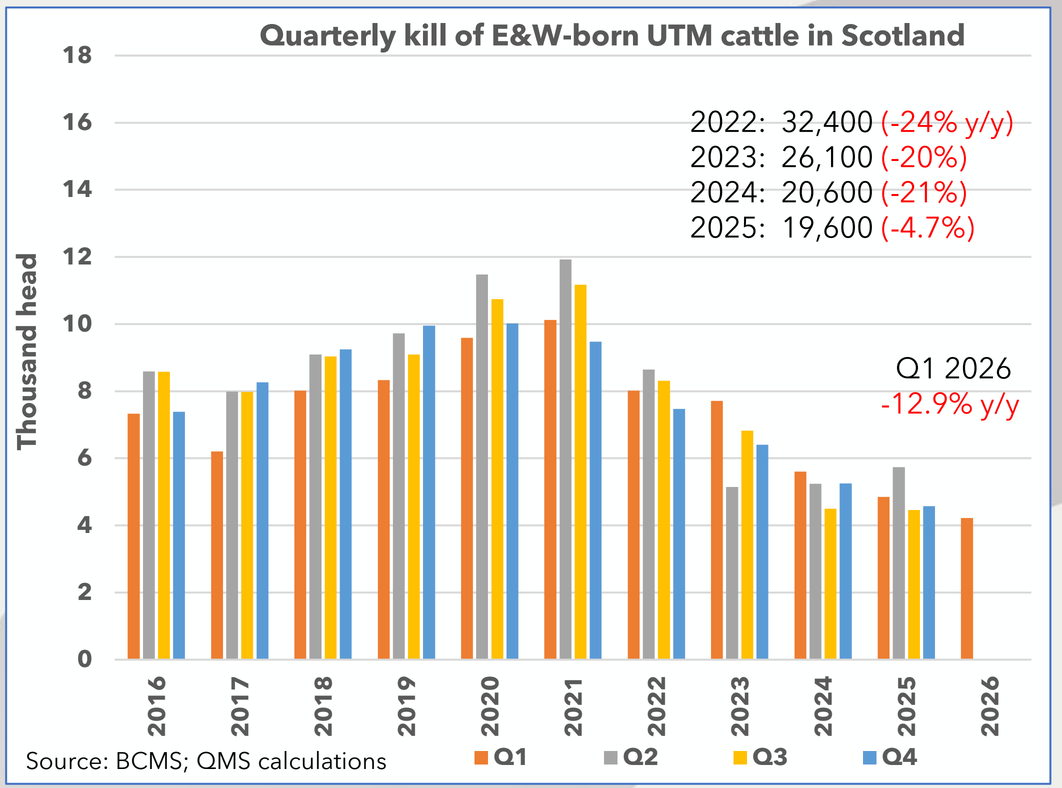
Source: AHDB; ONS; QMS calculations
Note: Scottish farmgate price and UK consumer price index

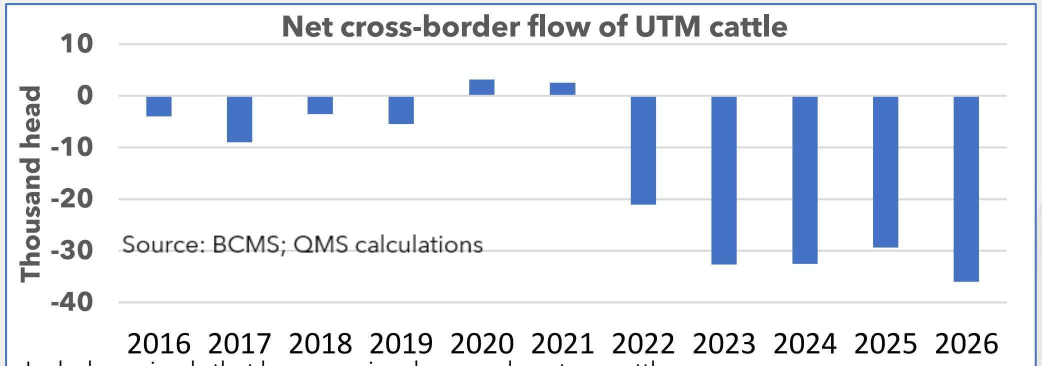
- Underlying consumer demand remains firm, with spending continuing to grow sharply on beef, far out-pacing the rise in household incomes.
- However, the share of households buying beef has continued to reduce, and the frequency of purchase has also dipped further at GB level.
- The Scottish retail market has been outperforming GB in 2026.
- The annual rate of price inflation is now slowing as the comparison period is picking up the start of last year's price surge.
- Interestingly, farmgate and retail prices are now in a similar place on a 2020 = 100 index, suggesting more scope for promotional activity this summer.

Source of retail data: Worldpanel by Numerator UK; data covers sales of fresh and frozen unprocessed red meat; please note that sales data for Scotland can be volatile due to the limited sample size
*Penetration % - Number of households/individuals that bought at least once in the time period as a percentage of total households/individuals.
**Frequency - Average number of purchase trips per buyer in the time period.

Cross-border kill of cattle aged under 30 months – slightly smaller net outflow supported the UTM kill at Scottish abattoirs by about 1% in 2025 compared to 2024, but this reversed at the start of 2026



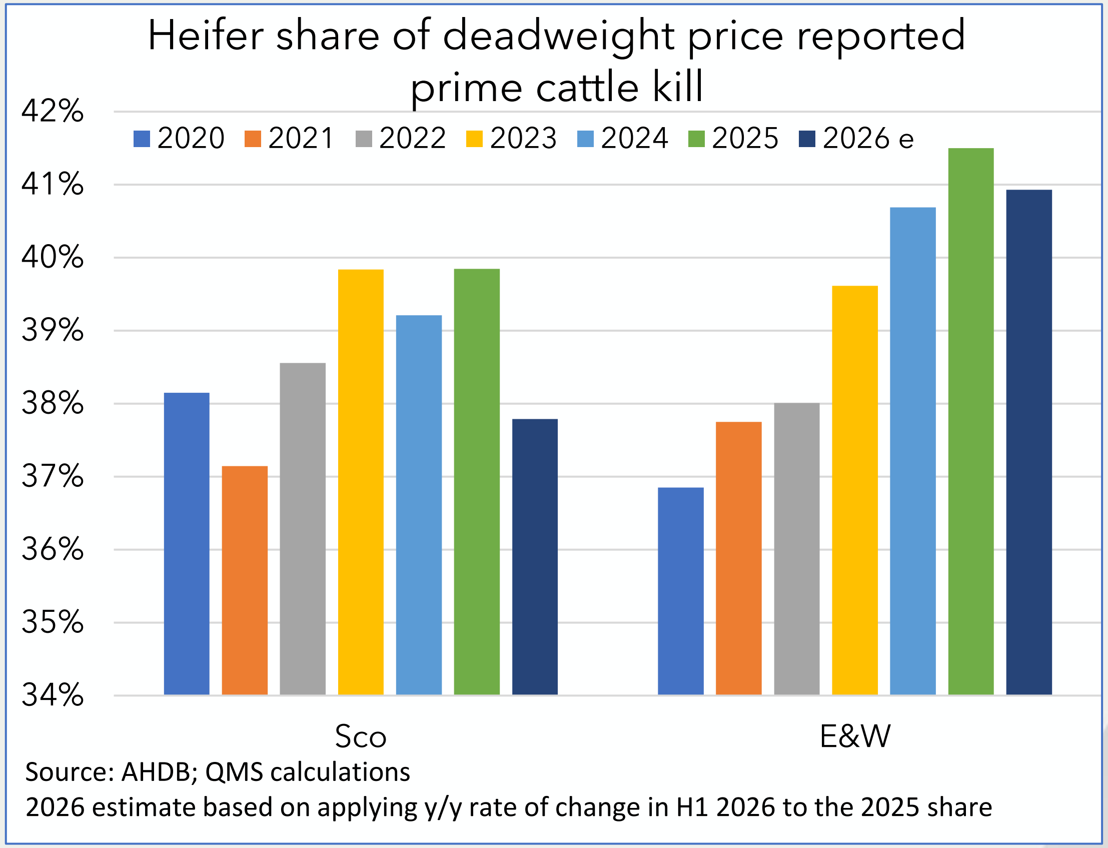


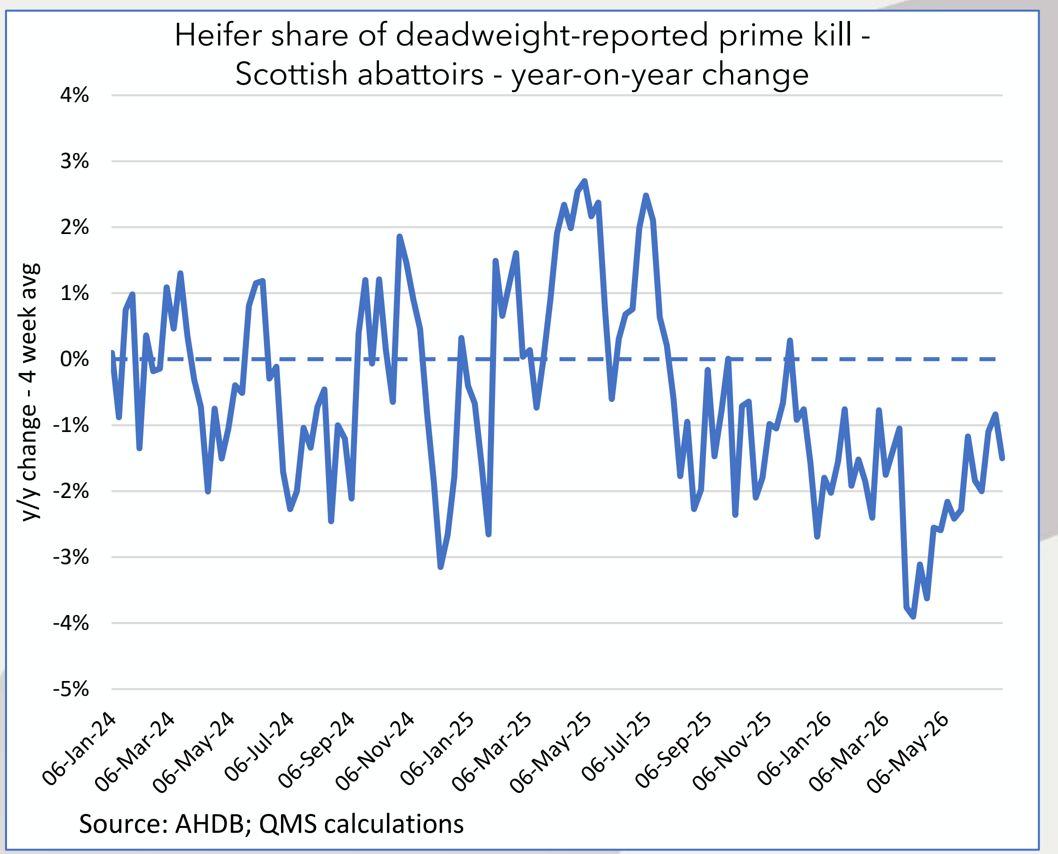


Includes animals that have previously moved as store cattle;
2026 estimate based on annualised Q1 movements, where annual totals are based on the 2021-25 average share of annual inflow and outflow taking place in Q1

- Slaughter of Scottish-born cattle at under 30 months in England & Wales rebounded strongly at the start of 2026, lifting 9% from Q1 2025 levels. While well down on the 2023 peak (-16%), numbers were 26% above the 2017-21 average for Q1.
- Slaughter of E&W-born cattle in Scotland had shown signs of steadying in 2025 after three years of considerable decline, but there was a stronger decline again in Q4, followed by a further significant reduction at the start of 2026.
- The net impact in 2025 had been slightly positive for slaughter numbers in 2025, at +3,200 head, equivalent to 1% of the 2024 UTM kill in Scotland.
- While lower moves to English farms and auctions in the second half of 2025 signalled that a widening of the net outflow was unlikely, the Q1 uplift in outflow that materialised was driven by a jump in direct-to-slaughter moves. The net outflow was the second highest for any quarter, behind only Q2 2023.

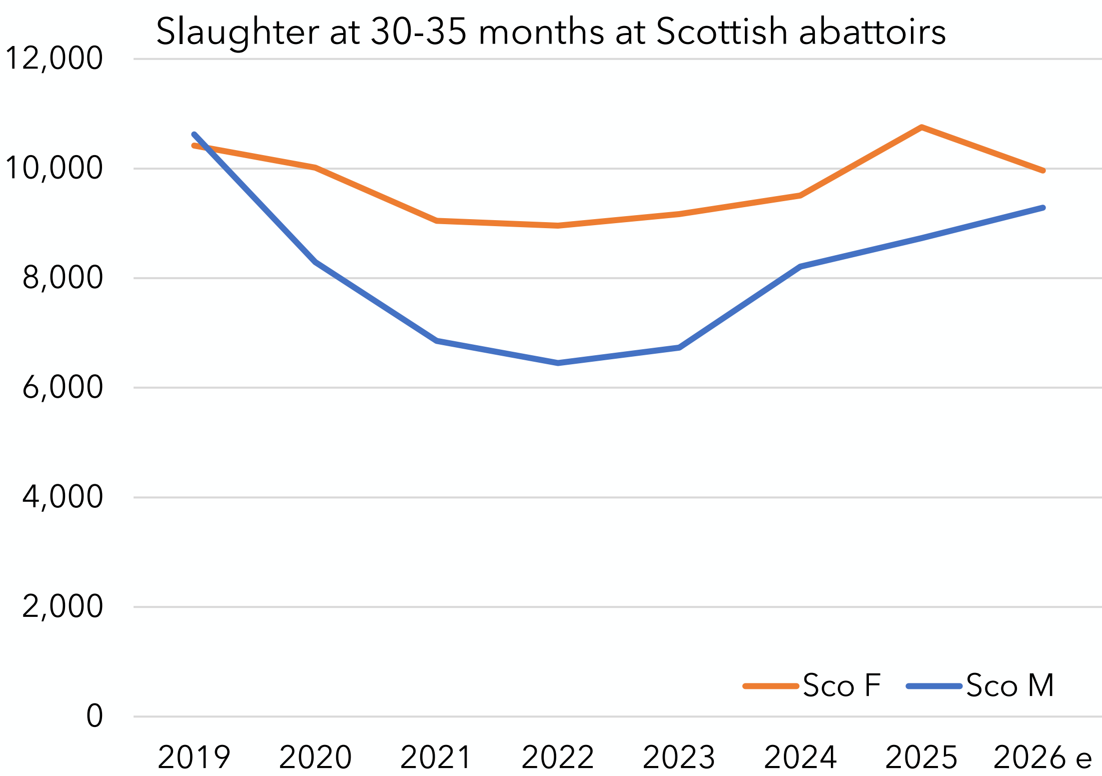
Heifers underpinning slaughter in the short-term



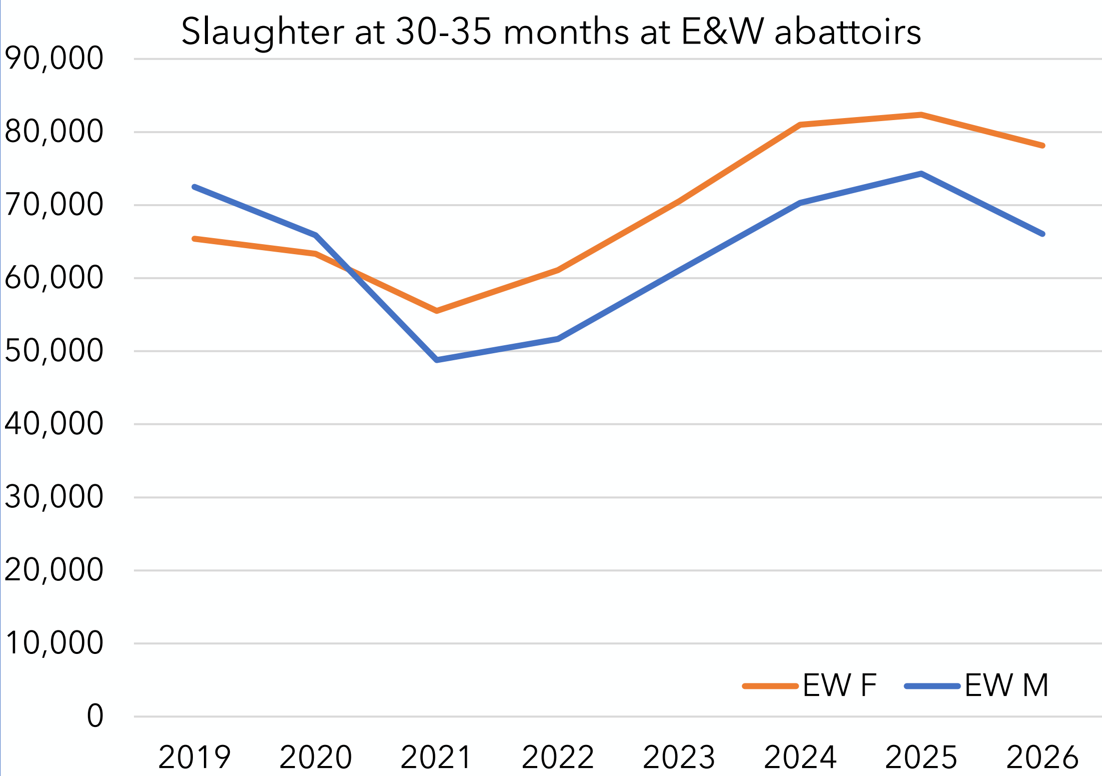


- Elevated heifer kills have been supporting slaughter in recent years while limiting herd size
- Is part of the upwards trend a reflection of more beef-sired dairy heifers in the system as a result of the increased uptake of sexed semen?
- Contradiction between elevated heifer kill and low overall slaughter rate in 2025 (also the case in 2023), but a low male kill in 2025 could translate into a higher male kill in 2026
- Consistently lower heifer share of slaughter in the price reporting sample in Scotland since August 2025, which has been sustained through the first half of 2026 in Scotland, could signal a stronger move towards herd stability, but less evidence of this in E&W.
- Last year's lower level to compare against in the second half could see the year-on-year comparison trend back towards zero without signalling a move away from rebuilding

Older prime cattle supported slaughter from 2023 to 2025, but numbers have fallen in 2026, reflecting lower calf registrations in 2023



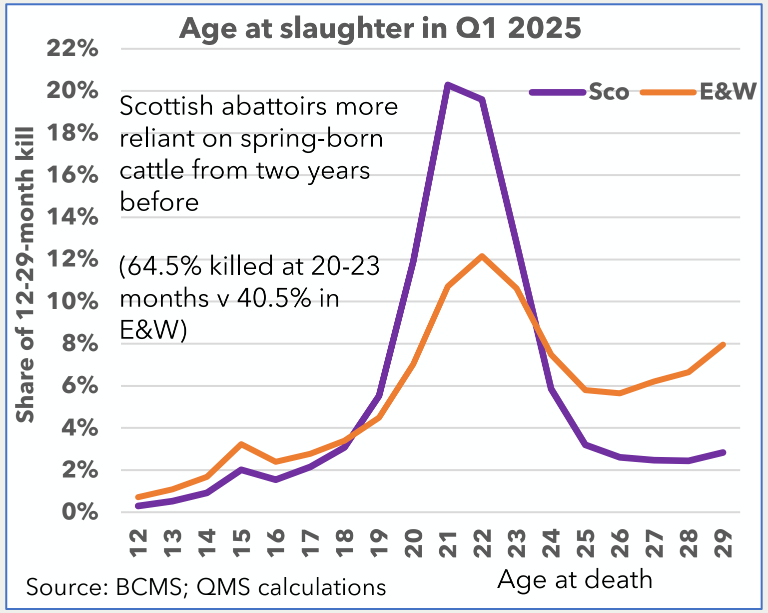
Source: BCMS
QMS estimate for 2026 based on y/y change in the first half

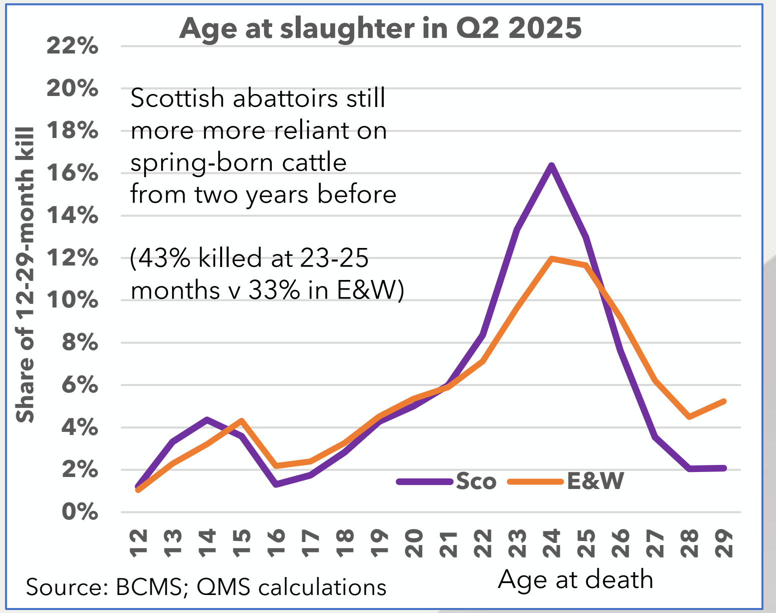


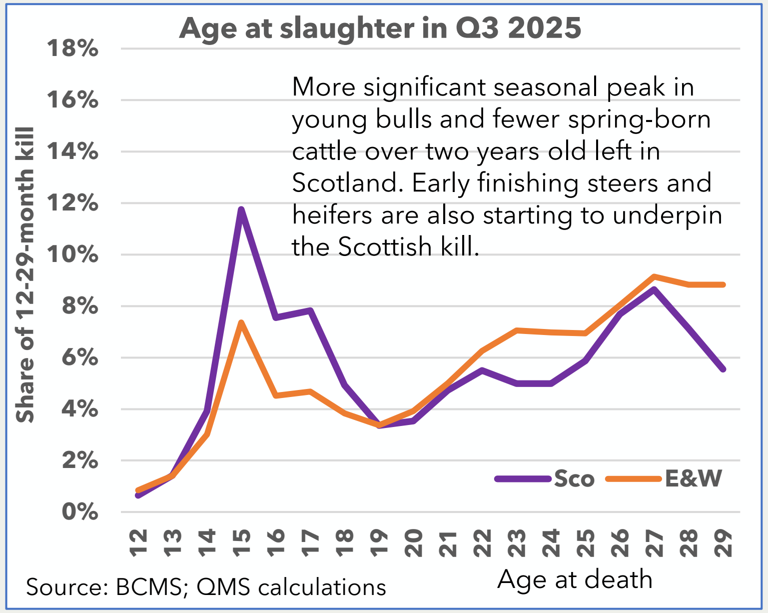
Source: BCMS
QMS estimate for 2026 based on y/y change in first half

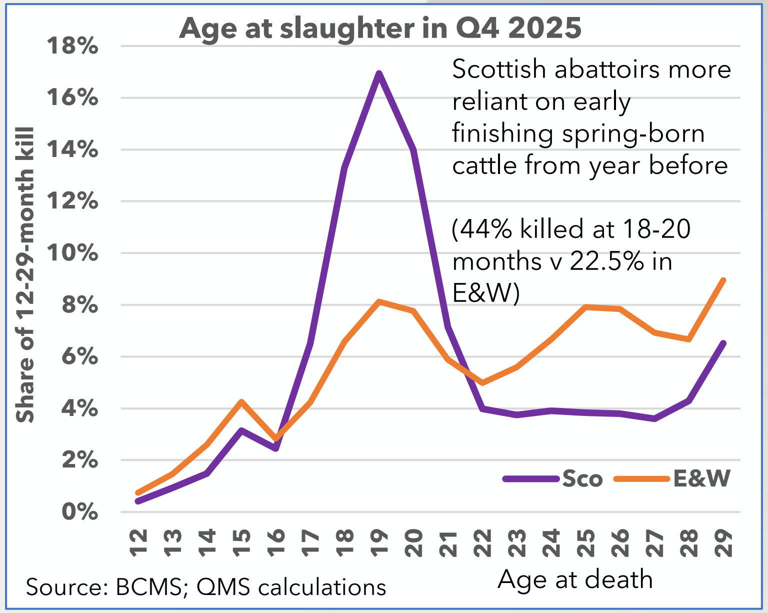
- The stronger rise in the male kill in this age group since 2022 indicates that the increase has been in prime cattle rather than down to slaughter of cows at younger ages, but there was a shift towards females in 2025.
- A further increase in 2025 reflected a higher population on farm at the start of the year in Scotland, although numbers did then tighten in the second half
- Slaughter has fallen back this year in line with tighter supplies of older prime cattle, in turn reflecting lower calf registrations in 2023

Seasonality of prime cattle production







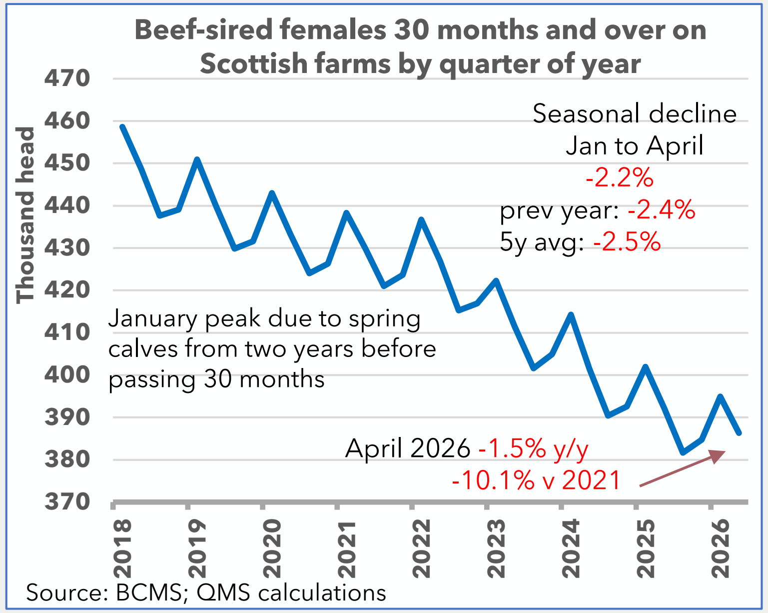


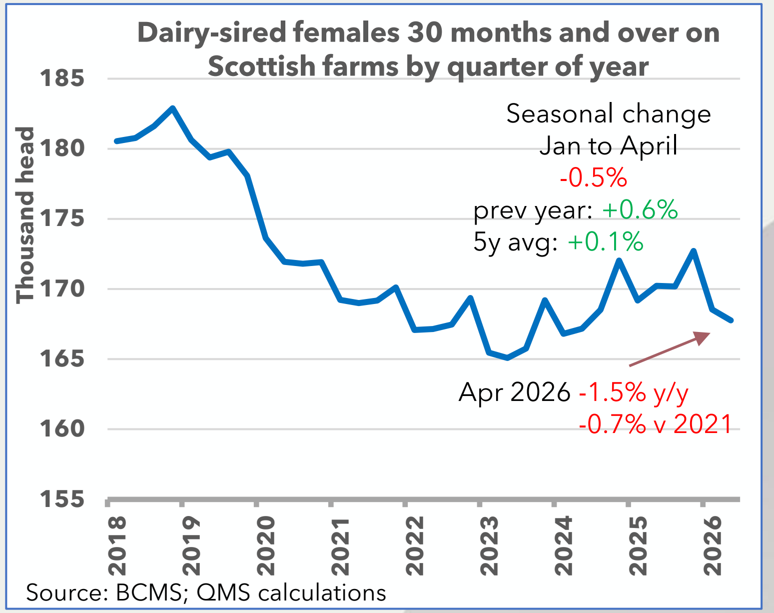
The dominance of spring calving in Scotland and a peak slaughter age at just under two years old means that availability of prime cattle is at its highest of the year in Scotland in the first half. A peak slaughter age of 21-22 months combined with an April high for calvings points to peak supply in January and February.

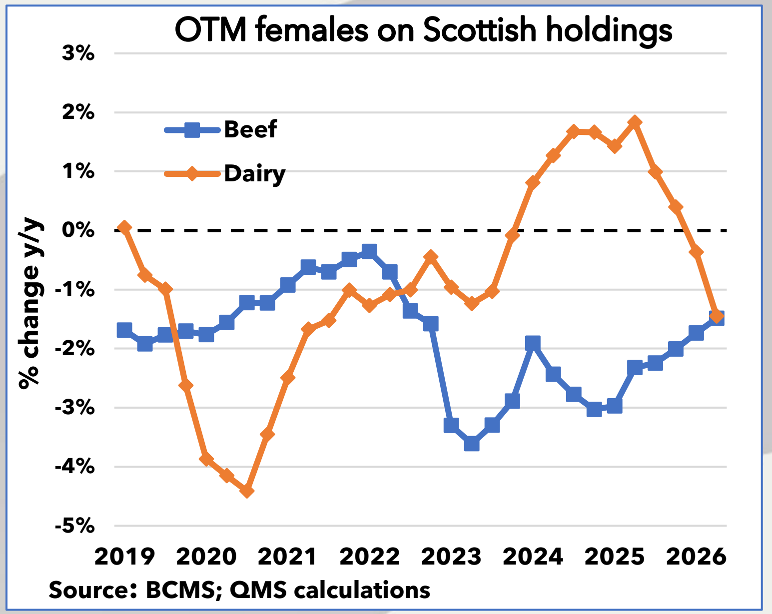
However, supply briefly rebounds in May and June following turnout, before slowing down in the summer, partially offset by the arrival of the young bulls from the previous year's spring calf crop.

After a weak third quarter, slaughter builds again towards the year-end as the early finishing spring-born cattle come on stream in more significant numbers at around 18 months of age.

Longer-term supplies outlook - beef herd decline softened further in spring 2026, while the dairy herd contraction accelerated







In April 2026, there were 386,300 beef-sired females aged 30 months and over on Scottish holdings. This was a 1.5% decline from a year earlier, which was the smallest reduction seen since July 2022, around the time that we first heard concerns that the herd was going to fall sharply. Numbers were down just over 10% on five years before and by nearly 14% on 2018.

The seasonal decline from the previous quarter was the slowest for the period since 2021, with this being the third consecutive quarter to be on the positive side of the five-year average. However, the improving trend remains modest.

Looking ahead, if seasonal changes were to continue exceeding their five-year average by 0.3 percentage points, the year-on-year rate of decline would settle at about -1%. One limiting factor to a slowdown in herd decline had been a reduced population of beef-sired females aged 24-30 months, but they reversed into growth in April 2026, up 2.7% year-on-year following three quarters of decline.

With the breeding herd continuing to contract, albeit at a slower rate, productivity gains are being required to prevent further falls in prime cattle production. These gains have been supported by the culling of the least productive cows and the additional beef-sired calves produced by growth in the dairy herd in 2024 and 2025. However, the dairy herd has now gone into reverse following a downwards shift in farmgate milk prices, and despite the rebalancing of store and finished cattle prices, the beef herd has continued to contract.

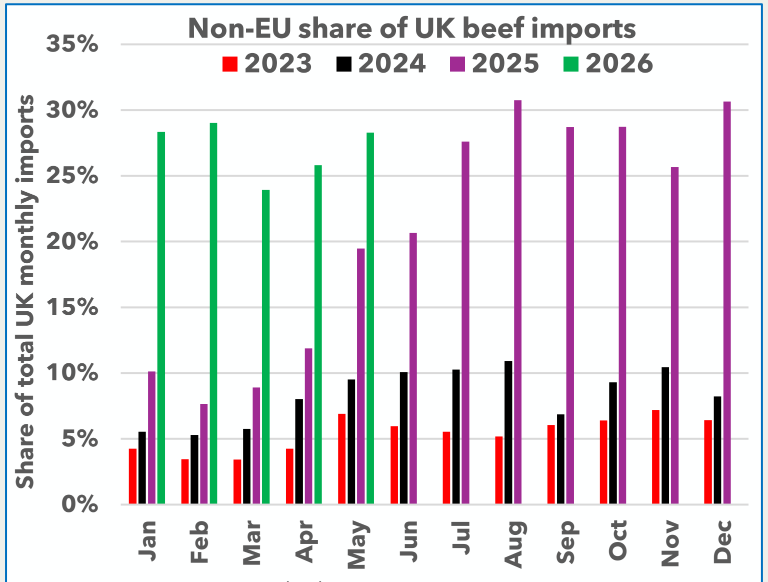
While also softening, the year-on-year decline in the suckler herd in England & Wales has continued to outpace the decline in Scotland, with 2.4% reduction in beef-sired females over 30 months in April. Meanwhile, dairy herd contraction accelerated, and this may begin to squeeze supplies again once the higher calf crop of 2025 has been worked through.

Females aged 30 months+ on farms (y/y change in April 2026)			
Month	Dairy	Beef	All
Sco	-1.4%	-1.5%	-1.5%
E&W	-2.1%	-2.4%	-2.2%
GB	-2.1%	-2.0%	-2.1%
Source: BCMS; QMS calculations			

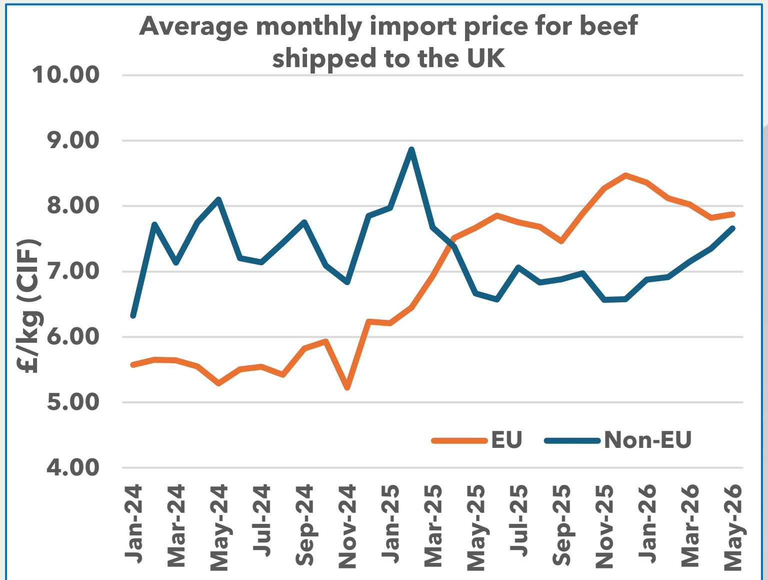
Females over 2 years that have calved (y/y change, Dec 2025)			
	Dairy	Beef	All
Scotland	+0.4%	-1.4%	-0.8%
England	-0.9%	-3.5%	-1.8%
Wales (June 2025)	+1.1%	-5.0%	-1.1%
Source: Defra; Scottish Government; QMS calculations			

Imports - switch towards price competitive non-EU beef

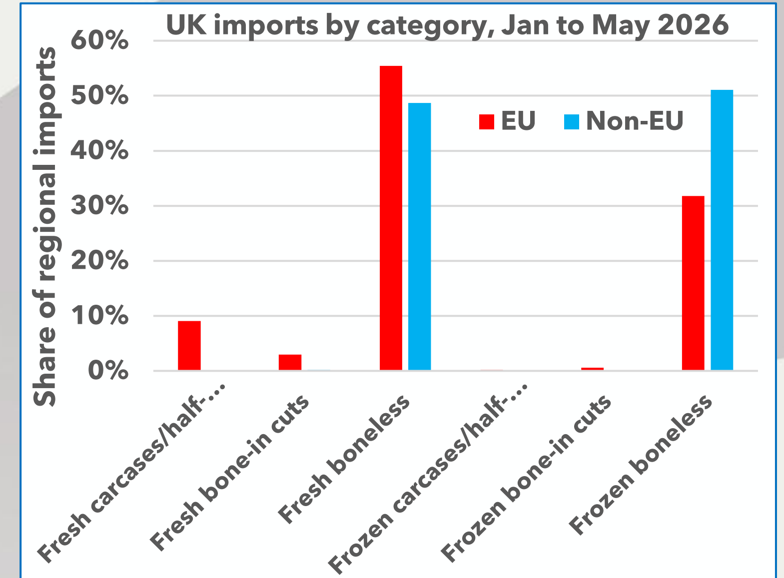
QMS
Quality Meat Scotland



Source: HMRC; QMS calculations



Source: HMRC; QMS calculations



Source: HMRC; QMS calculations

Non-EU imports have traditionally been higher value cuts for the foodservice sector at highly competitive prices, but there was some coverage in UK retail in 2025. The level of trade suggests that a significant quantity will have been imported having paid the full UK tariff (12% + £2.54/kg for boneless beef).

Non-EU import penetration appears to have steadied at 25-30% of UK beef imports, averaging 5,600t per month between July 2025 and May 2026. The monthly average import volume from non-EU markets in 2022 was only 800t, rising to 1,000t in 2023 and 1,700t in 2024. Non-EU imports reached 50,800t in 2025, up from 20,100t in 2024 and 12,200t in 2023.

There was an interesting reduction in the average price of non-EU imports as volumes increased, potentially signalling a shift in the balance of cuts/ market outlets, although there were signs of this shifting again in March and April 2026, with the average import price in May reaching a 14-month high. The UK trade data only goes down to the eight-digit HS code level, which doesn't split down boneless product any further.

As a dairy beef producer, imports from NZ may be manufacturing grade beef, resulting in significantly lower import prices than Australia, while low Brazilian import prices may be more of a reflection of lower cattle prices.

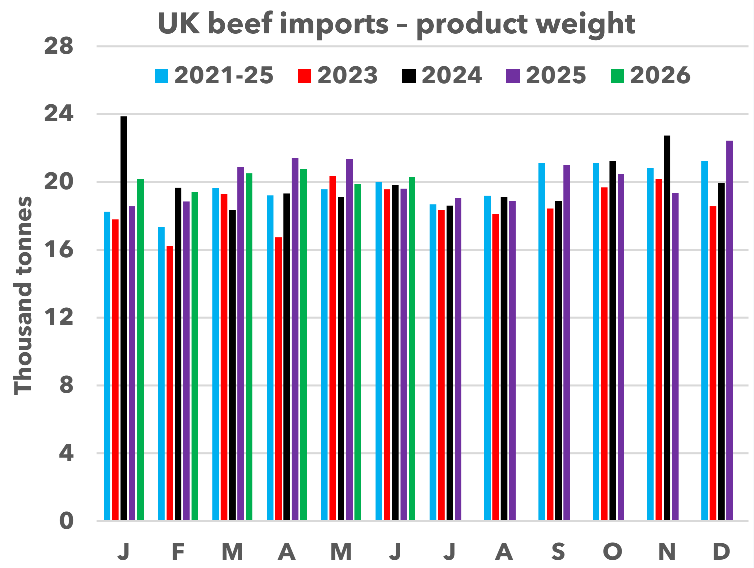
Note: beef trade data based on HS 0201 and 0202

Average UK import prices from selected suppliers, January to May 2026

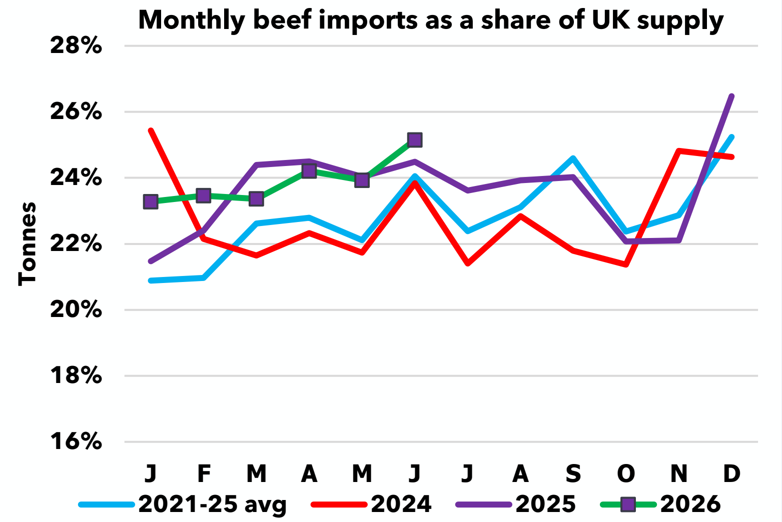
Supplier	Average price (£/kg)
Irish Republic	8.08
New Zealand	6.49
Australia	8.48
Brazil	5.64
Uruguay	8.79

Source: HMRC; QMS calculations

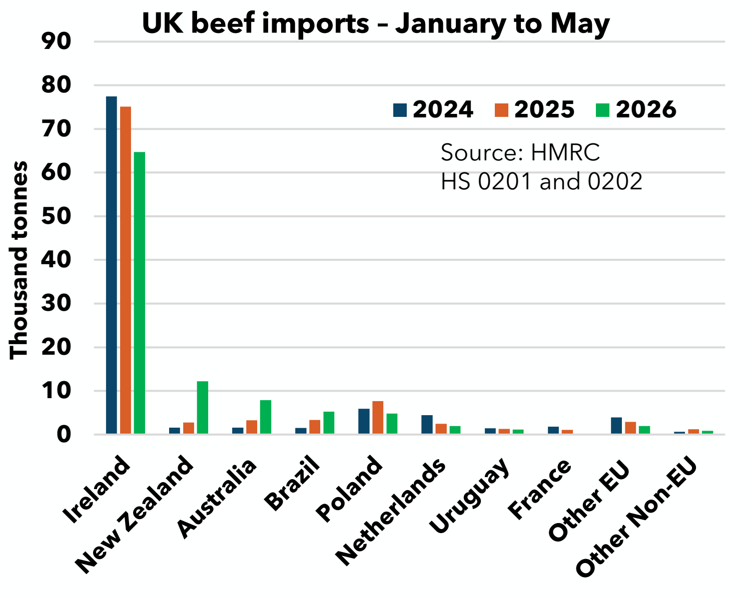
International Trade – UK import volumes



Source: HMRC; QMS calculations



Source: Defra; HMRC; QMS calculations
Trade data based on HS0201 and HS0202 in product weight



UK beef imports by country – January to May (tonnes)			
	2024	2025	2026
Ireland	77,465	75,096	64,683
New Zealand	1,617	2,772	12,174
Australia	1,614	3,273	7,848
Brazil	1,489	3,357	5,243
Poland	5,868	7,626	4,785
Netherlands	4,461	2,476	1,982
Uruguay	1,439	1,260	1,156
Italy	399	693	661
Spain	1,008	911	626
Paraguay	213	289	394
Others	4,761	3,319	1,193
Overall total	100,333	101,071	100,746

Source: HMRC; QMS calculations
Top-ten suppliers based on Jan to May 2026

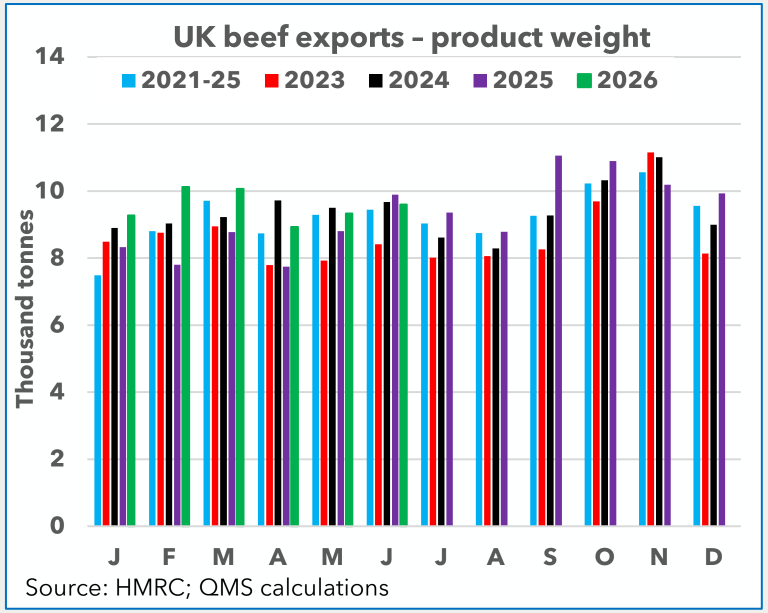
UK beef imports remained relatively stable overall in the January to May period, edging down by 0.3% year-on-year. However, they continued to show a significant rebalancing towards non-EU sources at the start of 2026, reflecting the shift that happened between spring and summer 2025. The Irish Republic remained the main supplier, at 64% of the total in the January to May period, but this was down ten percentage points from the same period of 2025, with import volumes 14% lower.

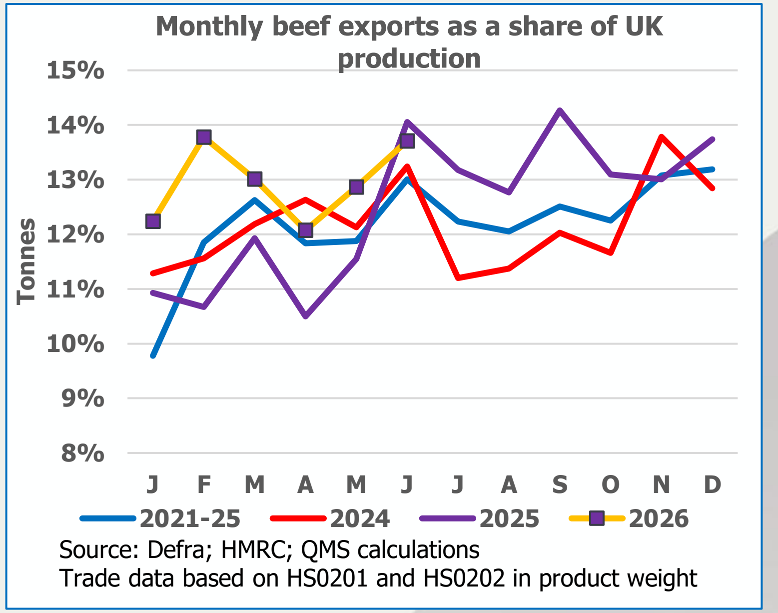
New Zealand became the second largest supplier, surging from a less than 3% share in the first five months of 2025 up to a 12% share. Meanwhile, Australia’s share jumped from just over 3% to almost 8%, and Brazil from just over 3% to over 5%.

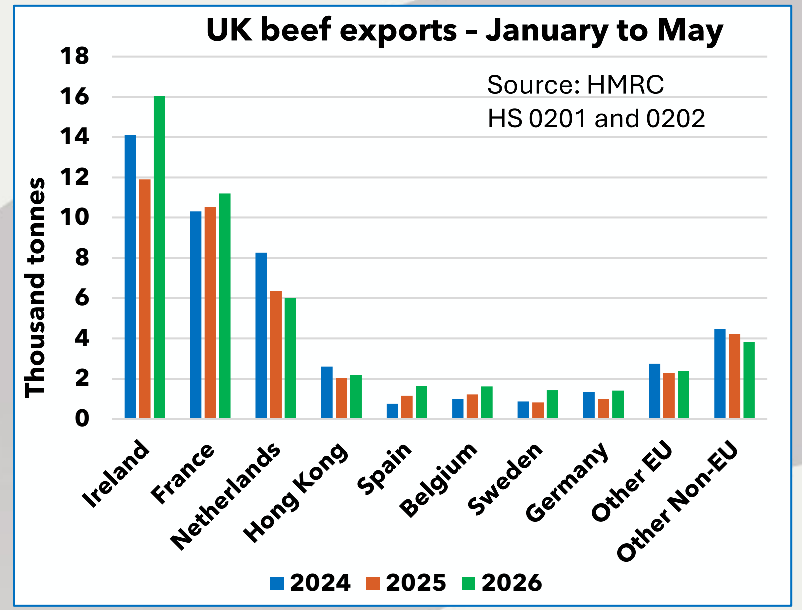
On the other hand, Poland saw its market share drop from 7.5% in the first five months of 2025 down to under 5%, and the Netherlands dipped to 2% from nearer 2.5% last year.

Note: beef trade data based on HS 0201 and 0202; June trade figures are estimates based on historic seasonal trends

International Trade – UK export volumes







UK beef exports by country – January to May (tonnes)			
	2024	2025	2026
Ireland	4,098	11,895	16,051
France	10,316	10,523	11,191
Netherlands	8,257	6,349	6,020
Hong Kong	2,593	2,036	2,160
Spain	746	1,145	1,638
Belgium	984	1,207	1,619
Sweden	865	811	1,422
Germany	1,321	980	1,403
Canada	1,049	1,637	1,221
Italy	1,122	935	906
Others	5,030	3,938	4,087
Overall total	46,382	41,456	47,718
Source: HMRC; QMS calculations			

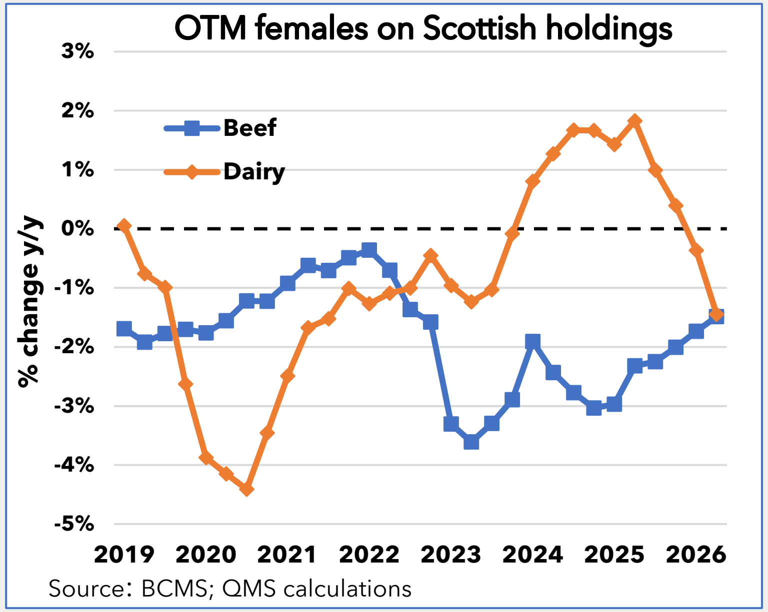
UK beef exports subtract supply from the domestic market and elevated volume sales this year point to a weakness of domestic demand. In the first five months of the year, export volumes rose by 15% year-on-year.

Export sales have shown some rebalancing this year with a significant shift towards the main market, the Irish Republic, and away from smaller suppliers. Indeed, sales to Ireland jumped by 35% year-on-year, taking its market share up almost five percentage points to 33.6%. Spain, Belgium, Germany and Sweden also saw considerable growth, whereas trade with Canada fell by 25% and there were small dips in shipments to the Netherlands and Italy. Meanwhile, there were below average increases to France and Hong Kong. Despite sales increasing 6%, France's market share dipped nearly two percentage points to 23.5%.

Note: beef trade data based on HS 0201 and 0202

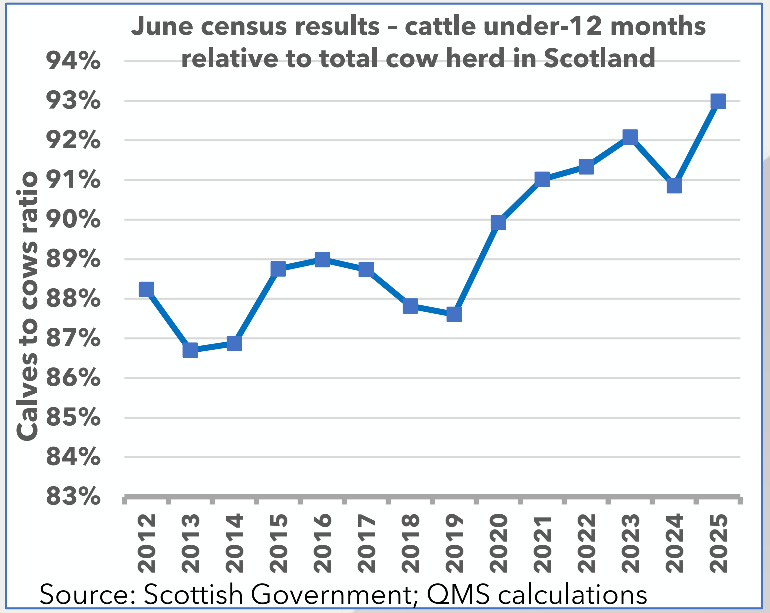
Meating Our Potential Indicators

Breeding Herd



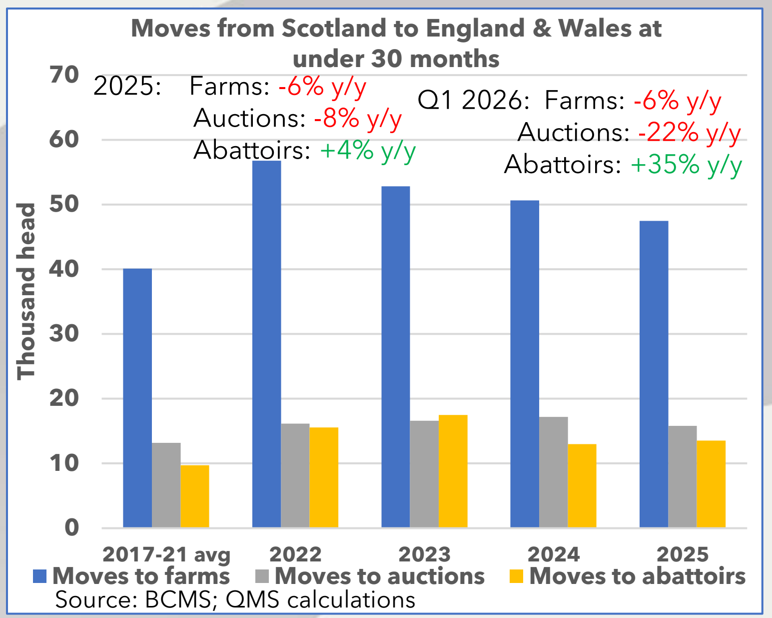
Beef herd decline has slowed, but numbers were still falling at a 1.4% annual rate in April. Signs of further improvement in ScotEID population data as of early-June (-0.9% y/y). A falling dairy herd will have implications for future beef supplies.

Productivity



Calf numbers relative to beef and dairy cows in the June census jumped higher in 2025, reflecting lower mortality due to good spring weather. Calf registrations relative to cows also rebounded, reaching a new high of 96.8% in 2025 (96.5% in 2024). Calf registrations increased at the start of 2026 against the continuing decline in cow numbers, suggesting further productivity growth.

Outflow



Note: some moves to farms are effectively slaughter moves, with the cattle being processed shortly after arrival in England

The level of outflow to England & Wales has slowed further at the start of 2026, although it does remain elevated above pre-2022 levels and direct moves to slaughter have increased significantly since September 2025.

Quality Meat Scotland