

Scotland at a glance

Total red meat	Beef	Lamb	Pork
			
Latest 12 weeks Spending +8.1% Volume -0.8% Avg price £/kg +9.0%	Latest 12 weeks Spending +12.0% Volume 0.0% Avg Price £/kg +12.0%	Latest 12 weeks Spending -6.7% Volume -19.3% Avg Price £/kg +15.6%	Latest 12 weeks Spending -5.5% Volume -2.8% Avg Price £/kg -2.7%

Scotland: Red Meat Market Benefits from Strong Beef and BBQ Demand

Total spending on red meat in Scotland remained elevated compared with last year, although the rate of growth slowed to 8.1%. Despite higher spending, overall volumes declined by 0.8% year-on-year, driven primarily by weaker sales of lamb and pork.

Beef remained at the heart of Scottish households' red meat purchasing behaviour, accounting for 64.4% of total red meat volume. Supported by warmer weather and major sporting events, beef steak sales continued to perform strongly, with volumes increasing by 15.3% year-on-year, reaching their highest level since April 2024. The growth was largely driven by an increase in BBQ occasions. In addition, beef steak prices continued to ease, with the average price falling by £1.32/kg compared with April, which likely provided a further boost to sales.



Lamb volumes declined compared with last year, primarily due to a sharp fall in roasting joint sales. Some of this volume decline could be a timing effect, with Easter Monday being the first day of this period in 2025, likely giving extra support to sales of leg roastings. In addition, lamb availability was stronger during this 12-week period in 2025, due to a delayed marketing of hogs. However, grilling occasions continued to support demand for lamb chops and lamb steaks, with volume growth of 7.4% and 14.2% respectively.

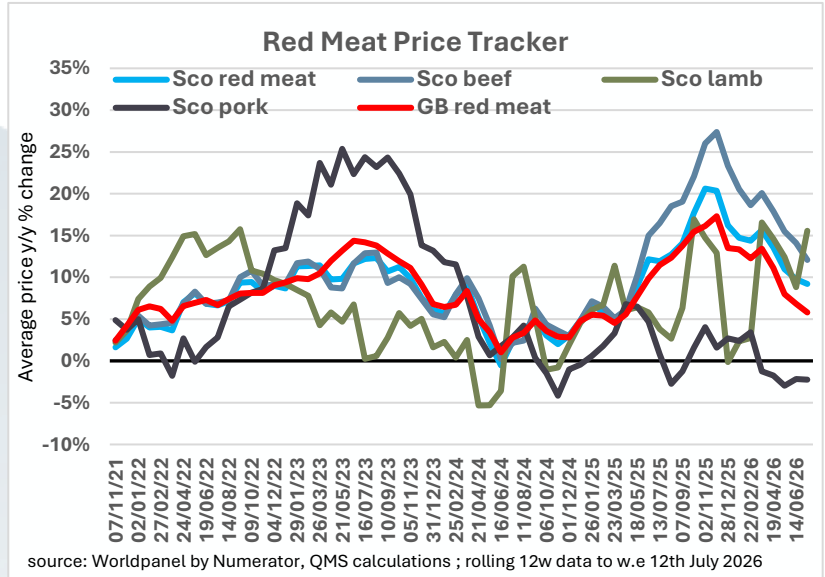
Primary pork sales also softened in Scotland, as less volume was purchased by consumers. However, pork mince, one of the category's most versatile cuts, maintained strong momentum, with volumes growing by nearly 35%. Pork chops also performed well during the summer period, recording a year-on-year volume increase of 13.4%.

Despite ongoing cost pressures, demand for red meat remained resilient, supported by favourable weather and summer sporting events. As beef price inflation continued to cool down, consumer confidence in beef purchases appeared to strengthen, supporting expectations for further sales growth. BBQ occasions also boosted demand for popular grilling cuts such as beef steaks and lamb chops, highlighting consumers' willingness to include quality red meat in social occasions. Looking ahead, cooler weather in Scotland compared to the South may have some impact and limit some opportunities for grilling cuts. However, it could create additional demand for more comforting dishes featuring red meat stewing cuts as these start to appear back in meal repertoires. Furthermore, with the peak lamb enjoyment season approaching, lamb sales are expected to strengthen in the coming months.

Price Inflation

Red meat price inflation in Scotland continued to dip in July, following a softening trend since peaking in November 2025 and remains above the GB average. Scottish red meat prices were 24% above August 2023 levels when the Cost of Living crisis reached its inflationary peak.

Scottish beef inflation has moved below its previous peak in 2023. Meanwhile, higher farmgate lamb prices continued to support a relatively high level of lamb price inflation, making lamb the highest inflated sector. By contrast, pork deflation remained relatively stable, reflecting softer market conditions at the farm gate.



	 Spending Million £	Spending yoy	 Volume kg	Volume yoy	 Avg prices £/kg	Avg price yoy	
	Primary beef	£58.9	12.0%	4.48m	0.0%	13.17	12.0%
	Beef diced	£3.8	29.8%	0.32m	27.8%	12.02	1.6%
	Beef mince	£25.7	2.5%	2.69m	-8.0%	9.55	11.5%
	Beef roasting	£3.6	30.5%	0.28m	23.3%	12.81	5.8%
	Beef steak	£24.7	20.2%	1.10m	15.3%	22.39	4.3%
	Primary lamb	£6.0	-6.7%	399.2k	-19.3%	15.00	15.6%
	Lamb chop*	£1.4	11.6%	86.1k	7.4%	15.98	3.8%
	Lamb steak	£2.0	26.8%	109.8k	14.2%	18.57	11.1%
	Lamb roasting	£0.8	-61.7%	54.2k	-66.8%	14.71	15.1%
	Lamb mince*	£0.9	20.2%	72.7k	4.8%	12.52	14.7%
	Primary pig meat	£12.0	-5.5%	1.88m	-2.8%	6.40	-2.7%
	Pork chop	£1.5	14.6%	0.21m	13.4%	7.39	1.1%
	Pork medallion	£0.7	-48.9%	0.07m	-51.6%	9.64	5.5%
	Pork mince	£1.8	31.2%	0.36m	34.7%	5.06	-2.6%
	Pork roasting	£1.9	-7.9%	0.38m	-2.3%	4.97	-5.7%
	Pork steak	£3.3	-8.3%	0.48m	-11.3%	6.90	3.3%

*Low sample size, use with caution