The Scottish Red Meat Industry

PROFILE

2026 EDITION

QMS
Quality Meat Scotland

The Scottish Red Meat Industry
PROFILE

Purpose: To highlight the importance of the red meat sector to Scotland's rural economy while providing the full range of industry stakeholders with key statistics for use in their work. This profile also aims to improve transparency in the supply chain, showing where activity takes place from farm to final market outlet, and where changes in cross border trade policy would place current activity at risk.

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Data Disclaimer: All deadweight price data used in this report is supplied to QMS by AHDB, who collect the data from reporting abattoirs each week and publish a consolidated set of data, regionally within GB for cattle, and GB-wide for sheep and pigs.

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A SNAPSHOT

SCOTTISH RED MEAT INDUSTRY ECONOMIC IMPACT

Total impact from farming, processing and supply chain multipliers

£4.2bn of output and **£1.3bn** of GVA

Total output from cattle, sheep and pig farming
£1.9bn
(+17.6% y/y)

Total abattoir output from cattle, sheep and pig processing
£1.36bn
(+20.2% y/y)

FARMING OUTPUT BY MAIN FARM TYPE IN 2025

CATTLE PRODUCTION
£1.32bn
(+22.6% y/y)
26.2%
of Scottish agricultural output

SHEEP PRODUCTION
£443m
(+21.9% y/y)
8.8%
of Scottish agricultural output

PIG PRODUCTION
£146m
(-6.7% y/y)
2.9%
of Scottish agricultural output

FARMGATE AVERAGE PRICES IN 2025

PRIME CATTLE	PRIME SHEEP	PRIME PIGS SPP
659.7p/kg dwt	**328.33p/kg lwt**	**204.5p/kg dwt**
(+30.3% y/y)	(+3.9% y/y)	(-2.4% y/y)

FARM ASSURED PREMIUM AT SCOTTISH AUCTIONS IN 2025

PRIME CATTLE	PRIME SHEEP
14.3%	**6.0%**
(14.4% in 2024)	(5.6% in 2024)

LIVESTOCK POPULATION IN JUNE 2025

CATTLE	**1,653,813 heads**
SHEEP	**6,539,130 heads**
PIG	**312,312 heads**

BEEF	SHEEPMEAT	PIGMEAT	OFFAL	SKINS AND HIDES
£1.04bn	**£168.1m**	**£62.9m**	**£76.5m**	**£16.1m**
(+26.4% y/y)	(+8.1% y/y)	(-2.4% y/y)	(+4.9% y/y)	(-12.7% y/y)

RED MEAT PROCESSING SALES*

SCOTLAND	REST OF UK	INTERNATIONAL EXPORTS
30%	58%	12%

* Note: figures do not add to 100% due to rounding

ABATTOIR SECTOR EMPLOYMENT

2,400
EMPLOYEES

50%
ARE NON-UK NATIONALS

£77m
OF WAGES

PER CAPITA CONSUMPTION (CARCASE WEIGHT EQUIVALENT)

BEEF
17.3kg
(UK 15.3kg)

SHEEPMEAT
2.3kg
(UK 3.9kg)

PIGMEAT
17.1kg
(UK 20.1kg)

SELF-SUFFICIENCY

BEEF	SHEEPMEAT	PIGMEAT
154% (ABATTOIR)	164% (ABATTOIR)	24% (ABATTOIR)
184% (FARM)	473% (FARM)	113% (FARM)

UK RED MEAT TRADE

BEEF IMPORTS
20.9%
FROM NON-EU
(8.3% in 2024)

LAMB EXPORTS
31.3%
OF UK PRODUCTION
(29.3% in 2024)

AVERAGE PORK IMPORT PRICE
-6.7%
v 2024

LIVESTOCK FARMING GREENHOUSE GAS EMISSIONS

SUCKLER BEEF
-3.5% 2024 v 2023

SHEEP
-1.4% 2024 v 2023

Introduction

After a more settled year in 2024, significant volatility returned to the Scottish red meat sector in 2025. Despite challenges, sector output and gross value added (GVA) jumped to new record highs, influenced by higher cattle and sheep prices. Combined output from the farming and processing of cattle, sheep and pigs is estimated to have risen by nearly 19% to almost £3.3bn in 2025. After accounting for the economic multipliers which ripple out through the Scottish economy due to the sector's interactions with its supplier base, the total impact could have risen as high as £4.2bn of output and almost £1.3bn of GVA in 2025.

Turnover from primary red meat processing in Scotland is estimated to have surged in 2025, lifting 20% to £1.36bn, driven mainly by higher cattle prices. Higher revenue from beef, lamb and offal, reflecting modelled increases in wholesale prices, was partially offset by lower turnover from pork, hides and skins. A net outflow of store and finished livestock continues to limit the red meat sector's overall economic contribution, but equally it represents a future growth opportunity to add extra value to the Scottish economy.

Nevertheless, the report highlights the longer-term risk to the economic and social contribution made by Scotland's red meat sector from declining livestock numbers. While the pace of decline in Scotland's beef cow herd slowed to a 1.4% year-on-year reduction in December, numbers were still down 10.4% on 2021 and by 16.2% on 2015. Midway through the year, one of Scotland's seven large abattoirs closed, leading to reduced competition for cattle in the second half of 2025. More positively, the outflow of store cattle to finishers in England and Wales slowed further from the peak seen in 2022, though numbers remained well above the 2017-21 average. Moves from Scottish farms to abattoirs in England and Wales edged up again but remained below the highs of 2022 and 2023. In the pig sector, the June census signalled a sharp contraction of the pig herd even before market conditions deteriorated in the autumn. However, there was a small rebound in the ewe flock after three years of decline, and the rebuild continued in the second half, likely reflecting brighter prospects in the lamb market, where there is evidence of a strong demand shock in 2024 persisting through 2025.

A smaller farming sector has a knock-on effect on the economic prospects of the abattoir sector and vice versa, while smaller farming and processing sectors would have an impact on businesses in the wider supply chain that rely on their custom, while risking the loss of skills which have been crafted and honed over the generations. The positive social contribution of the red meat sector should not be forgotten, especially in remoter rural areas where year-round residency can be vital to the retention of local services. Meanwhile, a contraction of domestic production

only pushes up import requirements to keep up with demand from a growing human population in the UK, putting food security at risk in a geopolitically volatile environment. The UK remained a net importer of beef and pork in 2025.

One of the main drivers of the downwards trend in breeding stock has been a lack of profitability. However, a rise in store cattle prices at spring sales in 2025 was repeated in the autumn, supporting calf producer confidence, and this helped slow the pace of herd decline. On the flip side, store cattle values rose more strongly in 2025 than finished cattle, signalling a squeeze on finishing margins. For pig producers, market conditions had remained relatively favourable in the first half of the year, as although finished pig prices were falling, they still held above the cost of production. Things then deteriorated in the final quarter, with a backlog on farm leading to more pigs going beyond target carcase weight ranges, lowering prices and adding to the cost of production, while signalling the potential for further herd contraction in 2026.

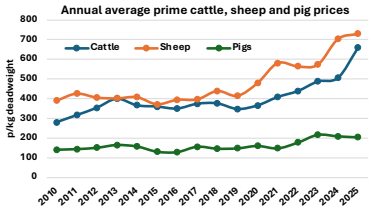
Away from livestock, some production costs remained more stable in 2025, reflecting balanced global commodity markets, with limited spillover from conflict in the Middle East to energy markets. However, this remained a significant risk, demonstrated by the situation that developed in spring 2026. Although the UK labour market began to soften in 2025, wage growth remained elevated, added to by a significant lift in minimum wage rates and a sharp increase in employer National Insurance Contributions. Manufacturing sector wages rose by another 5% in 2025, taking them nearly 30% higher than in 2019, with agricultural inputs averaging 27% higher and processing inputs 41% higher. The processing sector was also squeezed by the sharply higher cost of purchasing cattle and elevated lamb prices. For pig processors, although purchase costs fell, low EU and Chinese pig and pork prices placed downwards pressure on prices in price sensitive market segments.

In 2025, underlying demand for red meat remained strong, supported by consumer preferences towards high-protein products and the avoidance of ultra-processed foods, plus support to consumer spending from elevated wage growth. A growing preference for natural sources of protein drove primary meat consumption upwards, while sales of meat-free protein alternatives came under pressure.

Although underlying demand held firm, when the surge in farmgate beef prices at the start of the year flowed through to consumer prices for beef, pushing them up by around 30%, there was an inevitable impact on the volume and composition of demand despite significant spending growth. However, a shift towards cheaper cuts and cheaper proteins, may have had some positive impact on lamb and pork sales. Meanwhile, in the hospitality sector, there was a significant level of switching towards highly competitively priced beef from non-EU sources, pushing non-EU beef from around 10% of UK imports up to around 25-30% in the second half of the year.

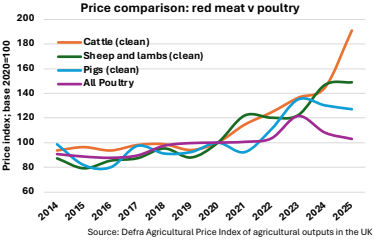
As ever, 2025 was a varied year for the different species. On a green/amber/red scale, cattle have been rated as amber, with higher pricing, increased consumer spending levels and calf producer confidence gains offset by lower consumption volumes, increased import competition from non-EU countries and a slower decline in the beef herd. However, pigs have been rated as red due to herd contraction and a growing backlog on farm at the end of the year, resulting in falling farmgate prices along with an external pricing shock due to low EU pig and pork prices. By contrast, the sheep sector has been rated green due to another record year of pricing, an improved lambing season, further export growth, and an abattoir production rebound in Scotland.

Producer Prices



Source: AHDB; IAAS; QMS calculations
Deadweight prime cattle prices at Scottish abattoirs; Lamb auction prices at Scottish auction marts converted at a 45% killing out rate; Pig prices are the GB SPP.

**Lamb auction price converted to deadweight using an assumed carcase weight that is 45% of the live weight. Pig prices are based on the GB DAPP from 2010 to autumn 2014 and the GB SPP from autumn 2014 onwards*



Source: Defra Agricultural Price Index of agricultural outputs in the UK

Farmgate prices for Scottish prime cattle and prime sheep remained relatively stable for a decade after increasing in the early 2010s, before beginning a significant upwards trend in 2020. Cattle prices rose strongly in 2025, following an incredibly tight start to the year, while sheep prices saw a more modest rise after a jump higher in 2024. Pig prices at GB reporting abattoirs were relatively stable before picking up through 2022/23 as pig numbers fell from their peak and input costs jumped. However, prices fell back in 2024 and 2025 due to global oversupply, a drop in feed costs and relatively sluggish domestic demand.

Compared to 2020, average prices in 2025 rose by 80.1% for Scottish prime cattle, 52.1% for Scottish prime sheep, and 27.2% for GB standard pigs.

The Defra output price index also indicated a similar pattern for cattle, sheep, and pigs from 2020 to 2025. In comparison, poultry prices rose by a more modest 3% during the same period, reaching a peak in 2023 after a surge in input costs, before falling back sharply in 2024 and continuing to decline in 2025 as higher poultry production volumes placed downward pressure on prices despite strong consumer demand.

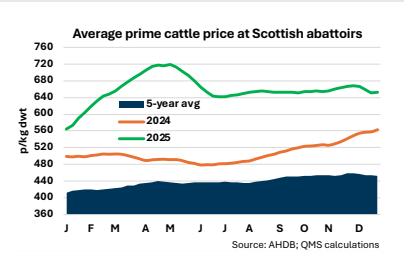
Cattle

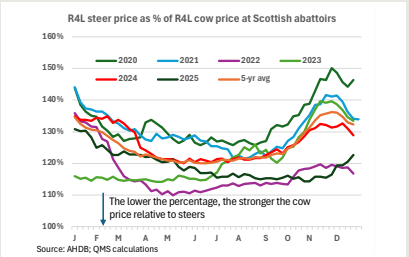
Prices for finished prime cattle

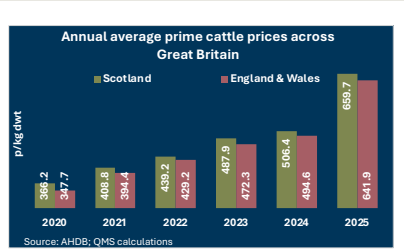
Building on a firm end to 2024, prime cattle prices surged in Scotland in 2025, increasing by 30.3% and averaging above the £6 threshold at 659.7p/kg. The real terms after inflation adjustments[1] surged as well, marking a record high.

In England and Wales, average prime cattle prices saw a similar level of increase of 29.8%. As a result, the Scottish premium widened to 17.8p/kg in 2025, recording a five-year high; though it only edged higher in percentage terms, to 2.5%.

Meanwhile, cull cow prices lifted as well, averaging at 528.5p/kg in 2025, indicating a 38.7% rise compared to 2024. When compared to steer prices, cow prices were generally following the five-year average level for the first half of the year. However, cow prices were unusually strong in the second half, with the quarter four relative peak in prime prices subdued and delayed.







Farm assurance premium in 2025

14.3% (14.4% in 2024)

47.8p/kg lwt (35.8p/kg in 2024)

Source: IAAS; QMS calculations

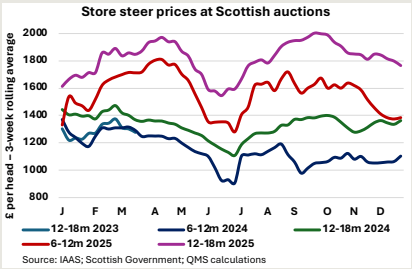
Note: pricing premium for sales of assured prime cattle over non-assured prime cattle at Scottish auctions

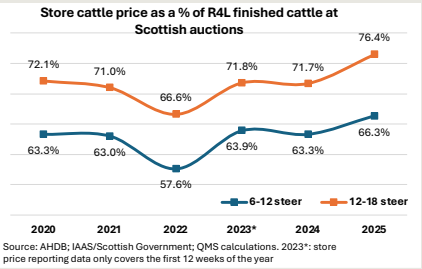
1 Real prices: Where inflation is greater than zero, the price that the producer receives is lower in real terms than the market (nominal) price. This is because the sales proceeds have less purchasing power in the wider economy due to the rise in the general level of prices. For example, a sales price of 500p/kg in period two would be equivalent to a price of 490.2p/kg in period one if the rate of inflation between the two periods was 2%, and 480.8p/kg with inflation at 4%. The inflation rate used is the CPIH – a measure of retail price inflation published and favoured by the ONS.

Price comparison for most common grades at Scottish abattoirs in 2025					
Grade	% of carcases in category	p/kg	£ per carcase	Change on year	
				p/kg	£ per carcase
R4L Steer	27.2%	663.8	2,468	+29.8%	+31.1%
R4L Heifers	33.8%	665.1	2,243	+29.6%	+31.3%
R3 Young Bull	21.5%	645.6	2,303	+32.0%	+31.6%
R4L Cow	10.9%	552.6	2,181	+36.5%	+36.0%

Source: AHDB; QMS calculations

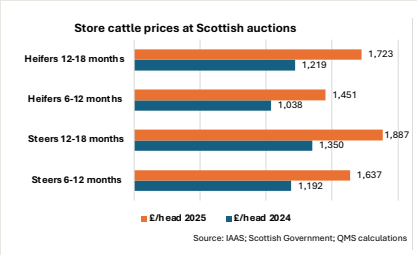
Store cattle

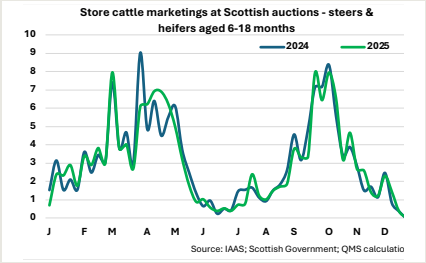




A strong demand from finishers coupled with tight supply of suckler-bred calves pushed store cattle prices higher in 2025, with the average steer prices for 6-12 months rising by 37.4% and 12-18 months increasing by 39.7% compared to 2024. While volumes lagged 1.1% behind 2024 levels, prices followed seasonal trends.

An increased level of store cattle prices at Scottish auctions relative to R4L finished cattle signalled a squeeze on margins for cattle finishers.





Sheep

Prices for finished sheep

Prime sheep prices[2] continued to rise in 2025, increasing by 3.9% at Scottish auctions, recording a new historical high with an average of 328.33p/kg liveweight. Prices were relatively flat for the first half of the year, with no obvious peak in the second quarter, unlike previous years, reflecting the wider market impact of delayed hogg sales. However, prices remained well above the five-year average throughout the year. After adjusting for inflation, the real-terms value edged up by 0.1p, reaching a new high in the past fifteen years.

At price-reporting abattoirs in Great Britain, lamb prices also averaged 2.8% higher than in 2024, at 709.4p/kg deadweight.

In the meantime, the average selling price for cull ewes and rams continued to surge, increasing by 21.9% at Scottish auctions, averaging £117.92 per head, highlighting a general strength in sheepmeat demand.

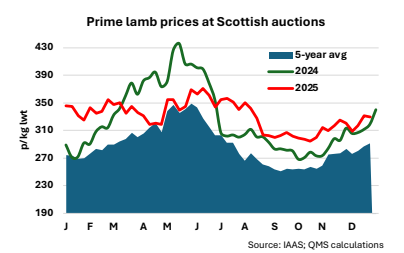
Farm assurance premium in 2025

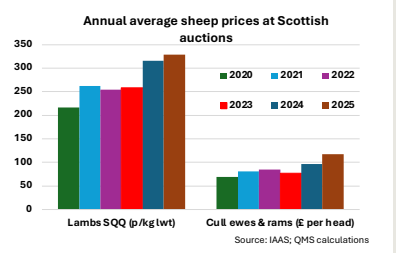
6.0% (5.6% in 2024)

18.6p/kg lwt (16.7p/kg in 2024)

Source: IAAS; QMS calculations

Note: pricing premium for sales of assured sheep over non-assured prime sheep at Scottish auctions





Notes: farm assurance premium at Scottish auctions

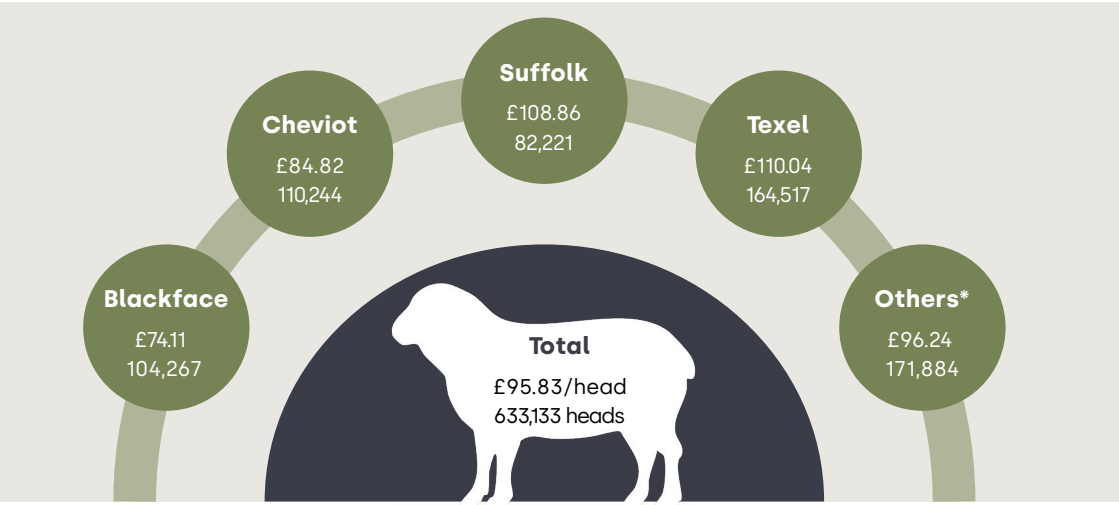
Prices paid at Scottish auctions for finished farm assured cattle and sheep are based on realised selling prices. The true premium cannot be observed because it is the difference between the price paid for an animal and the price which would have been paid for the animal had its assurance status been the opposite.

Only 5% of the prime cattle and 9% of the prime sheep sold at Scottish auctions in 2025 were non-assured, resulting in small sample sizes – particularly for cattle, with overall auction volumes equating to only 4% of annual prime cattle slaughter.

2 Annual average prime sheep prices are based on the old season price from January to April and then the new season lamb price from the beginning of May and are based on the Standard Quality Quotation which is lambs weighing 25.5-45.5kg liveweight at auction sales and 12-21.5kg deadweight at GB abattoirs.

Prices for store sheep

Store Lamb Trade at Scottish auctions 2025



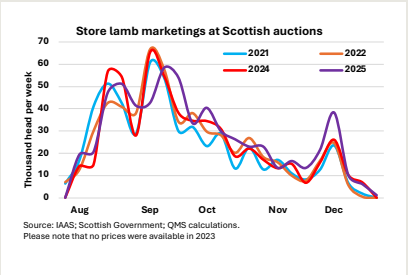
Source: IAAS/Scottish Government; QMS calculations

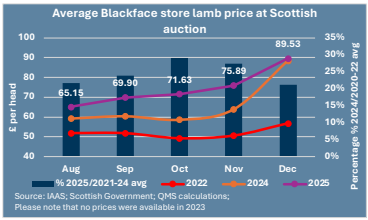
*Includes Greyface/mule, Suffolk X, Texel X, Beltex, Charollais, other continental, other pure breeds, other crosses and unspecified breed

In 2025, store lamb prices at Scottish auctions rose by 13.2% compared to 2024, which had already been seen as a strong year for the store market. Higher prices came despite a significant rise of 9.5% in the number of store lambs sold in 2025.

Prices of Blackface store lambs elevated by 15.6% year-on-year at Scottish auctions, possibly due to a supply shortage, with numbers decreasing by 2.4%.

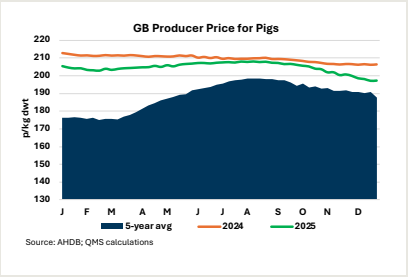
In 2025, Texel store lambs remained the most commonly sold breed at Scottish auctions, representing nearly 26% of the overall supply. In comparison, Blackface store lambs consisted 16.5% of the total supply, while Cheviot store lambs accounted for a slightly larger share at 17.4%.

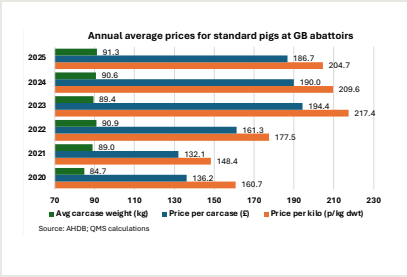




Pigs

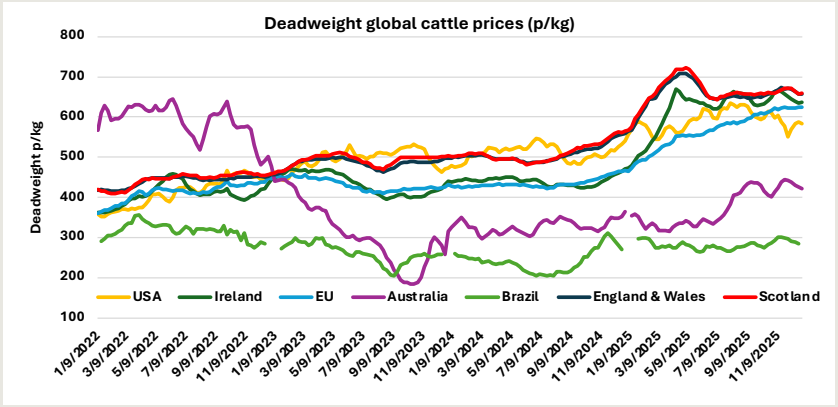
Pig prices at GB reporting abattoirs (SPP)[3] continued to fall back from the highs of 2023 and ended 2025 at their lowest level since summer 2022, falling back towards the estimated break-even level. In the final quarter, market prices came under significant downwards pressure due to a domestic backlog of pigs on farm coupled with an external pricing shock from the EU market. Indeed, increased EU pork production, higher tariffs on EU pork in China, and export restrictions on the EU's largest pork producer, Spain, following an outbreak of African Swine Fever on the outskirts of Barcelona in November all contributed to highly competitive EU pig and pork prices. In turn, these pressures reduced UK import and export prices, and bid down values in price sensitive market segments. Prices averaged 204.7p/kg in 2025, down 2.4% from the 2024 average of 209.6p/kg and 5.9% below the 2023 peak. Due to heavier weights over time, carcase prices averaged 1.7% lower than in 2024 and 4% below the 2023 peak. In real terms, after adjusting for inflation, prices continued to move away from recent peak levels, particularly at the end of 2025.





3 The 'Standard Pig Price' (SPP) is the price paid by a sample of abattoirs across Great Britain for a 'standard pig'. A standard pig is one that does not receive a premium based on a specific characteristic, such as its breed or being farmed organically. Bonus payments for meeting specific contract targets are also excluded. The only premia included are, therefore, those based on weight and carcase grade.

Global deadweight cattle prices in 2025



Farmgate cattle prices vary across the world, influenced by a range of factors, most notably supply and demand. The prices selected for comparison are those most representative of each country's market conditions.

Scottish deadweight cattle prices have consistently held a premium position in global markets, reflecting Scotland's reputation for high-quality beef. This premium position enhances Scotland's appeal in high-value export markets, though it may present challenges in competing on price in more cost-sensitive regions.

After peaking in May 2025 in Scotland due to strong demand, Scottish R4L steer prices rose to a significantly higher level against Australia and Brazil in 2025, averaging 1.8 times Australian cattle prices (Eastern States Young Cattle Indicator) and 2.4 times Brazilian cattle prices (São Paulo steers). A wider Scottish premium made exports to cost-sensitive markets increasingly challenging and resulted in heightened import competition.

While the US market remained strong in 2025, reflecting reduced production and firm demand, it was a little softer relative to the Scottish market. However, similar market forces ensured that EU beef prices moved closer to Scottish levels.

Sources:

USA cattle prices, dressed Wtd Avg Steer, 5 Area Del – USDA https://www.ers.usda.gov/data-products/livestock-and-meat-domestic-data/

Brazilian cattle prices, Steers SP https://www.pecuaria.com.br/cotacoes.php#quadro

EU cattle prices, Adult Male Indicative Price – European Commission **https://agridata.ec.europa.eu/**

Australian cattle prices, Eastern States Young Cattle Indicator – MLA https://www.mla.com.au

Irish cattle prices, Steers R3– LMC https://www.lmcni.com/

R4L steers cattle prices in Scotland and England and Wales–AHDB **https://ahdb.org.uk/markets-and-prices**

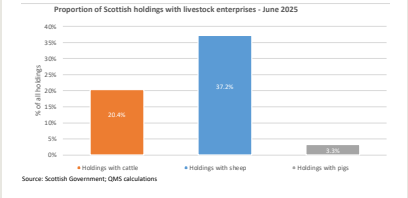
QMS calculations
Exchange rates – Bank of England, European Central Bank and Federal Reserve

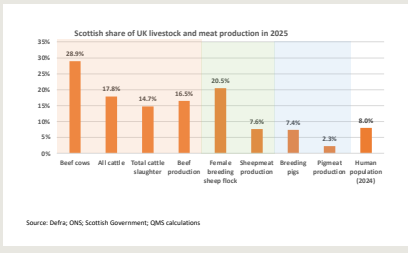
Livestock Production

June Agricultural Census results continue to highlight the importance of livestock farming in Scottish agriculture. In June 2025, 81.5% of Scotland's agricultural area was grass and grazing land, with 92% of agricultural holdings including some area of grass or grazing land.

Of the 48,330 holdings[4] reported in 2025, 41% recorded a main farm type as either LFA or non-LFA cattle and sheep[5], 8% mixed farming, and 35% 'general cropping; forage'. Specialist pigs accounted for 0.7% of holdings. Livestock presence reflected this land use pattern. Sheep were kept on 37% of Scottish holdings in June 2025, making it the most common enterprise in Scottish agriculture, while just over one fifth had cattle and 3.3% had pigs. In terms of breeding stock, 16% of holdings kept beef cows, 30% kept breeding ewes and 1% sows.

A large share of Scotland's cattle and sheep production takes place in Less Favoured Areas (LFAs). The June Agricultural Census for 2025 shows that 79% of beef cows and 89.8% of the breeding ewes were located in these areas. Dairy production and cattle finishing are less concentrated in LFAs; yet the majority of dairy cows (69.3%) and male cattle over a year old (57.2%) were found there. By contrast, pig production shows a different geographical pattern, with a much smaller share located in LFAs. Only 15.4% of female breeding pigs and 17.6% of non-breeding pigs were recorded there.





4 The number of holdings was revised down from above 50,000 due to a methodological change in 2023 which is now excluding any holding which has failed to report census results or submitted a Single Application Form to claim agricultural support payments in the past ten years.

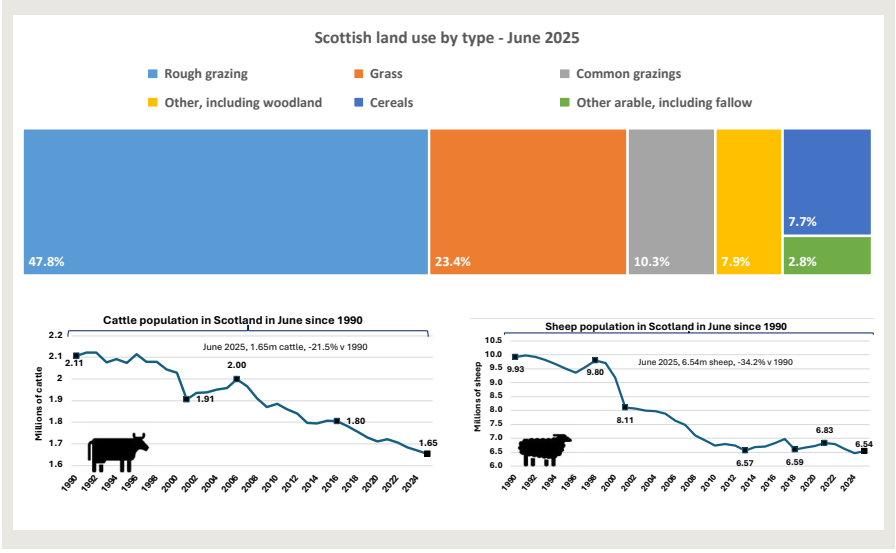
5 LFA refers to 'Less Favoured Area', which are areas of land deemed to be disadvantaged due to low levels of productive potential and/or a low human population in the area which is largely reliant on agriculture.

Scotland tends to specialise more in livestock production than in abattoir production, resulting in a significant net outflow of cattle, sheep and pigs for processing in England and Wales. This may reflect large population centres in England providing closer access to meat consumers and an abattoir workforce. Compared to the rest of the UK where dairy production dominates and beef tends to be a by-product of dairy, Scotland specialises in suckler beef production, with around two-thirds of the cow herd being beef breeds.

As a result, Scotland accounts for nearly 30% of the UK's beef cow population, well above its share of the total cow breeding herd. Compared with its 8% share of the UK human population, Scotland over-indexes in breeding cattle, and sheep, as well as in beef abattoir production. In contrast, it under-indexes in breeding pigs, and in lamb and pork abattoir production.

The cattle population in Scotland has experienced a long-term decline since the late 1990s. Although the Foot and Mouth Disease (FMD) outbreak of 2001 caused short-term volatility, the downward trend resumed following the Common Agricultural Policy (CAP) reform in the mid-2000s which shifted support away from annual numbers towards area-based payments. The pace of decline accelerated in autumn and winter 2022/23, driven by higher input costs and strong cull cow prices. Despite an improvement in market conditions, cattle numbers continued to fall in 2024 and 2025, slipping to 1.65 million head.

As of June 2025, Scotland's sheep population remained around one-third below its 1990 level. Unlike cattle, the majority of the decline occurred between 1999 and 2010, driven initially by the FMD outbreak and then by CAP reform. The population was comparatively stable through much of the 2010s and early 2020s, supported by firm market conditions and rising productivity gains. However, difficult lambing seasons in 2023 and 2024 led to further declines, before a slight recovery in 2025, reflecting better lambing percentages, slightly higher ewe numbers, and the strong returns available from the sheep market.



Scottish livestock greenhouse gas emissions

In Scotland, Greenhouse Gas (GHGs) emissions totalled at 39MtCO2e in 2024, falling 1% from 2023 and 50.5% below the 1990 baseline[6]. Transport was the main source of emissions, with over 28% of the total, followed by agriculture, business, and residential[7]. Although the Scottish agriculture sector has reduced emissions by 13.7% compared to 1990, equivalent to 1.19MtCO2e, its share of emissions has risen from under 11% of the total in 1990 to 19% in 2024 due to significant reductions in other parts of the economy, particularly energy supply, driven by the shift away from coal towards renewables.

Land use, land use change and forestry has also seen a substantial decline in emissions since 1990. Within this category, forestry and grassland act as carbon sinks, subtracting emissions from the category total and offsetting emissions from cropland and peatland.

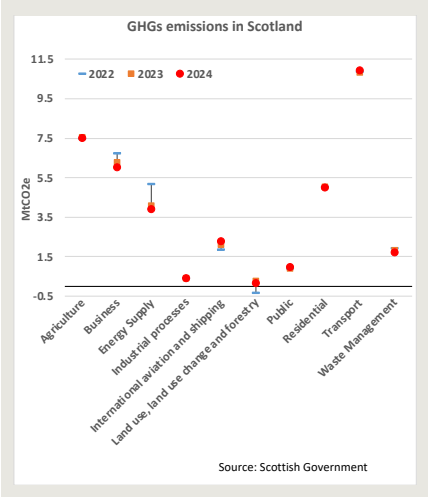
The Scottish red meat industry has already made progress in reducing its environmental impact, with many farmers adopting sustainable practices and investing in new technologies. Suckler beef and sheep farming reduced its greenhouse gas emissions by 19% between 1990 and 2024[8], heavily influenced by a reduction in stock numbers.

Suckler beef farming has historically been the largest contributor to greenhouse gas emissions within the agricultural sector, at 41.2% in 2024, although its share has been decreasing since 1990. Similarly, the sheep sector, which is the fourth largest contributor to agricultural emissions, has also seen a decline in its share. In contrast, the arable sector has experienced significant growth in its share of emissions.

1990-2024 GHGs emission reductions in Scotland (values in MtCO2e)	
Agriculture	-1.19
Business	-5.74
Energy Supply	-17.76
Industrial processes	-1.46
International aviation and shipping	0.35
Land use, land use change and forestry	-5.65
Public	-0.89
Residential	-3.01
Transport	-1.22
Waste Management	-3.13

6 Scottish Greenhouse Gas Statistics 2024; QMS calculations.
7 Based on Scottish emissions using National Communications categories
8 Scottish agriculture greenhouse gas emissions and nitrogen use 2024/25; QMS calculations.

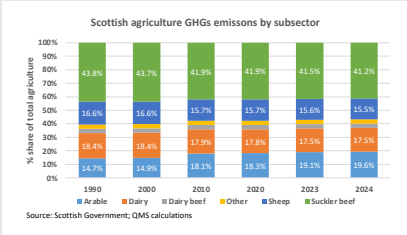
Across the Scottish livestock farm types included in the Farm Business Survey, average beef emission intensity[9] ranged from 29.2 to 33.4 kgCO_2e/kg dwt in 2024/25, depending on farm type. Lowland cattle and sheep farms recorded the lowest levels, likely reflecting higher productivity linked to climate and land capability.

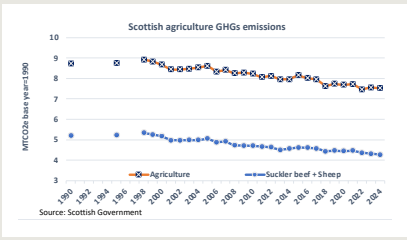


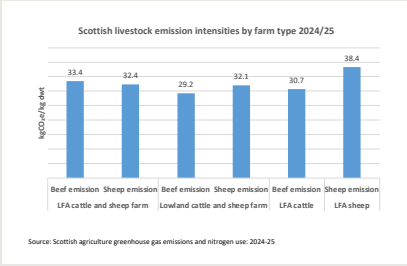
Beef emissions from lowland cattle and sheep farms recorded the biggest emission reduction from previous years across all livestock farm types, falling by 1.7 kgCO_2e/kg dwt, whereas sheep emissions on these farms saw the biggest emission increase, up by 5.14 kgCO_2e/kg dwt.

The 2022 Cattle and Sheep Enterprise Profitability in Scotland report found that higher levels of animal efficiency and productivity generally resulted in lower emissions intensity, a trend that was consistent over time[10].

However, environmental sustainability is about more than carbon emissions. Well-managed, sustainable livestock systems can have a positive impact on biodiversity, flora and fauna, and exert a significant and positive influence over the appearance of landscapes and their suitability as habitats for key species. Healthy soils developed by mixed farming systems are abundant in nutrients, organic matter and invertebrate life which promote thousands of vital farmland species.







9 Source: Scottish agriculture greenhouse gas emissions and nitrogen use: 2024/25. Average emission intensity measures the carbon footprint of a specific product from an activity or enterprise on a farm. For example, the average amount of GHG emitted in the process of producing a tonne of wheat, or a kilogram of beef.

10 Cattle and Sheep Enterprise Profitability in Scotland, commissioned by Quality Meat Scotland (QMS); Estimates were made of the greenhouse gas emissions associated with the surveyed enterprises, based on net liveweight produced or added during the calf and lamb crop year.

Scotch difference

To carry the Scottish red meat industry's three premium brands – Scotch Beef UK GI, Scotch Lamb UK GI and Prime Scottish Pork – livestock must have been born, reared and slaughtered in Scotland and spend their entire lives on QMS Assured holdings. Feed, hauliers and any auction marts used must also be assured.

This whole chain assurance underpins the integrity of these premium brands, giving consumers confidence in provenance, highest standards of production, and animal health and welfare while helping to deliver a quality eating experience.

Sales data from finished livestock at Scottish auctions showcases the high level of coverage of the assurance schemes in Scotland.

Sales of assured and non-assured stock at finished auction sales in Scotland, 2025

Category	Total sales	Assured	Non-assured	% assured
Prime cattle	12,924	12,290	634	95.1%
Cows	33,008	31,071	1,937	94.1%
Adult bulls	2,662	2,340	322	87.9%
All cattle	48,594	45,701	2,893	94.0%
Prime lambs and hoggs	915,452	841,126	74,326	91.9%
Cull ewes	290,463	253,576	36,887	87.3%
All sheep	1,205,915	1,094,702	111,213	90.8%

Source: IAAS; QMS calculations

Note – based on sales data from 51 of 52 weeks with data for w/e 11/01/25 unavailable

Cattle production – national and regional

While Scotland's beef herd has been contracting for two decades, there has been an acceleration of the decline since 2022. Although an improvement in market conditions contributed to a slowdown in the declines in 2025, beef cows were still down by another 1.4% year-on-year in December 2025, leaving numbers down 10.4% on December 2021. Highlighting the longer-term decline, by June 2025, beef cow numbers were 14.6% lower than in 2015 and 24.7% lower than in June 2006, when the Cattle Tracing Scheme began. Research conducted by QMS in Summer and Autumn 2024 found that concerns over a lack of profitability, challenges with the cost and availability of labour, and issues linked to an ageing population of farmers such as health concerns, work-life balance and lack of succession planning all played a part.

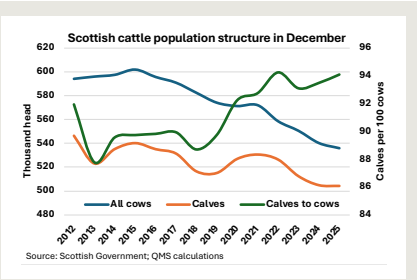
Scottish Cattle Population Structure in December 2025 – thousand head

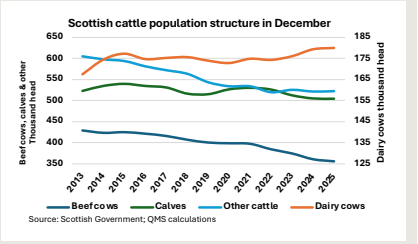
	2023	2024	2025	y/y change	Change since Dec 2020	Seasonal change since June 2025	Avg June to Dec seasonal change 2020-24
Female beef cattle, over 2 years with offspring	374.5	360.9	355.9	-1.4%	-10.7%	-4.6%	-4.9%
Female dairy cattle, over 2 years with offspring	176.1	179.4	180.0	+0.4%	+4.2%	-1.2%	-0.03%
Males over 12 months plus females over 24 months without offspring	282.2	279.7	278.8	-0.3%	-6.2%	-15.4%	-16.1%
Calves	512.6	505.1	504.5	-0.1%	-4.3%	-2.3%	-1.2%

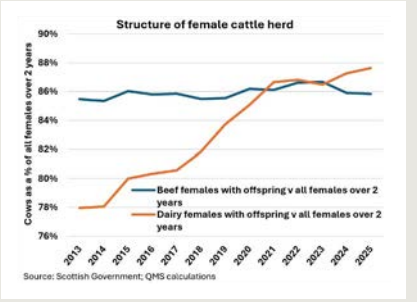
Source: Scottish Government; QMS calculations

By contrast, Scotland's dairy cow population expanded for a third successive year and reached a nineteen-year high in June 2025. However, a milk market downturn saw this change in the autumn and by December, the year-on-year increase had slowed to just 0.4%, with expectations of a decline to come in 2026.

A further decline in the suckler herd reduced the share of total cow numbers accounted for by beef cows in 2025. By December, the beef share of the total breeding herd fell by a further 0.4 pp to 66.4%. This was 3.4 pp lower than in 2020 and 4.1 pp lower than in 2015.

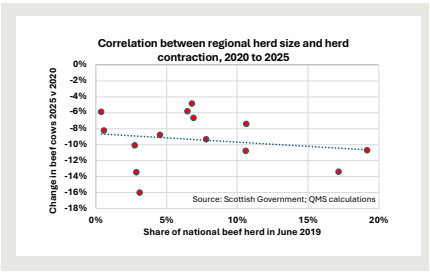


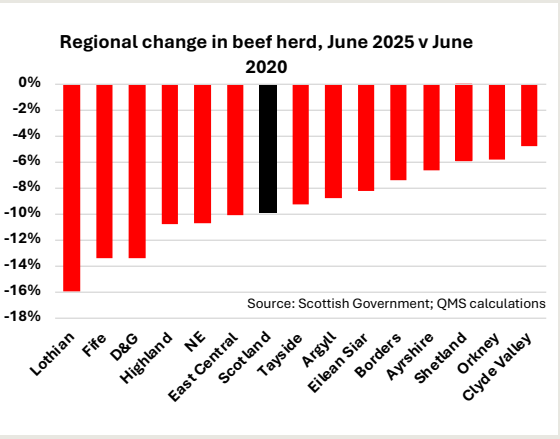


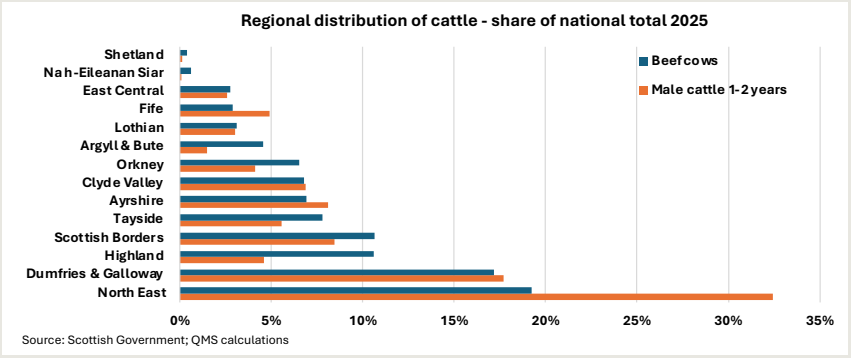


Based on data from June 2025, there have been significant herd contractions in the major production areas, with three of the four largest regional herds seeing above average declines over the previous five years. Compared to a national reduction of 9.9% in beef cow numbers between 2020 and 2025, Dumfries and Galloway (-13.4%), Highland (-10.8%) and the North East (-10.7%) all out-paced this, while the Borders reported a still-considerable 7.4% reduction. Lothian (-16.0%) recorded the steepest decline, while the smallest decline was in Clyde Valley (-4.8%).

While the beef herd has contracted considerably, calf numbers have proved more stable, partly supported by structural change within the dairy sector which has boosted the overall calf to cow ratio. Dips in this ratio in 2013 and 2018 reflected challenging spring weather conditions which raised mortality rates, but there was a general jump higher between the late-2010s and early-2020s. After signs of steadying in the 2020s, the calf to cow ratio picked up again in 2025, following more benign winter and spring weather than usual. Interestingly, the number of females over two years old with offspring relative to the total female population over two years old rose significantly in the dairy herd in the late-2010s and early 2020s while being relatively stable in the beef herd. This was influenced by a shift towards calving at two years old in the dairy sector.




Regional change in beef herd, June 2025 v June 2020
0%
-2%
-4%
-6%
-8%
-10%
-12%
-14%
-16%
-18%
Source: Scottish Government; QMS calculations
Lothian
Fife
D&G
Highland
NE
East Central
Scotland
Tayside
Argyll
Eilean Siar
Borders
Ayrshire
Shetland
Orkney
Clyde Valley


Regional distribution of cattle - share of national total 2025
Beef cows
Male cattle 1-2 years
Shetland
Nah-Eileanan Siar
East Central
Fife
Lothian
Argyll & Bute
Orkney
Clyde Valley
Ayrshire
Tayside
Scottish Borders
Highland
Dumfries & Galloway
North East
0%
5%
10%
15%
20%
25%
30%
35%
Source: Scottish Government; QMS calculations

With livestock production heavily influenced by land type, the cattle population is skewed towards producing beef calves in Scotland's island and upland areas. Meanwhile, dairy production is common in the South West, with Fife, Lothian and the North East geared towards cattle finishing.

Highlighting the flow of store cattle into Aberdeenshire for finishing, the North East accounted for 32.4% of Scotland's male cattle between one and two years of age in June 2025 compared with just 19% of the beef cow herd, and 13.7% of all cows. A significant inflow to Fife is also signalled, with a near-5% share of male cattle aged 1-2 but only a 2.9% share of beef cows and 2.5% share of all cows. For Lothian, the difference is more marginal.

SCOTTISH COW NUMBERS IN DECEMBER 2025

All cows **535,953** head

BEEF COWS

355,924 head
66.4% of all cows

DAIRY COWS

180,029 head
33.6% of all cows

Store cattle inflow and outflow in Scotland

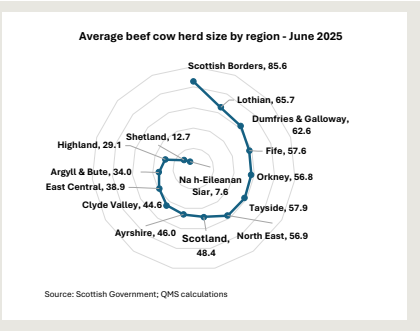
Source: Scottish Agricultural Census June 2025; QMS calculations

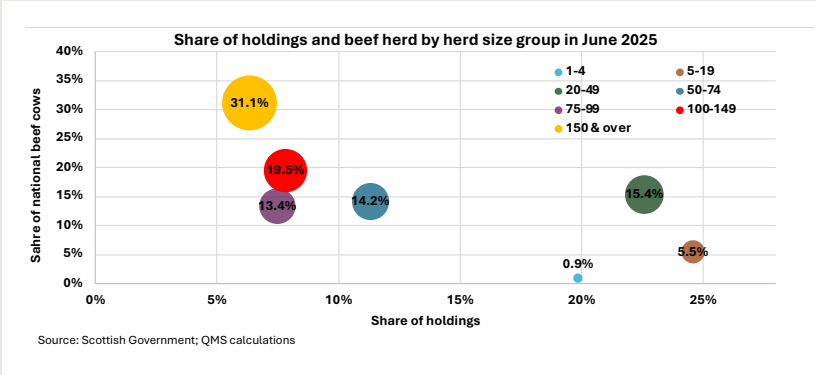
Note: this map was created to indicate store cattle movements across Scotland. When the percentage of the national total for all cows in a region is greater than that of male cattle aged 1-2 years, it indicates a store cattle outflow. Otherwise, it signals a store cattle inflow. For Tayside and the Borders, the percentage differences are too small to be categorised. In the South West, the figures will be affected by the dairy sector.

Herd size

The average number of beef cows on Scottish holdings was 48.4 in June 2025. Average herd sizes vary considerably across the country, with the Scottish Borders averaging 85.6 beef cows per holding, over 11 times higher than the average in Eileanan Siar (7.6).

Despite the national average herd size of 48.4, the distribution is skewed towards larger herds. 78% of the national beef herd were on holdings with at least 50 cows, while just over half of the herd were on holdings with 100 or more cows. Therefore, the median herd size is more than double the mean.





Calf registrations

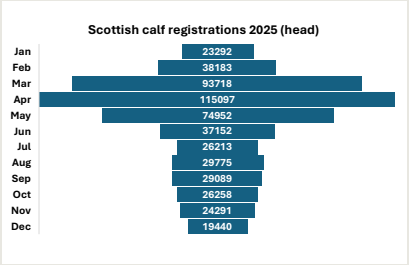
After calf registrations fell by 2.6% in Scotland in 2023, there were slower declines in 2024 and 2025 despite the continuing significant contraction of the beef herd. Total registrations fell by 0.8% in 2024 and 0.9% in 2025, dropping to 537,500 head. This was 4.5% below the 2021 level and 3.6% below the 2018-22 average.

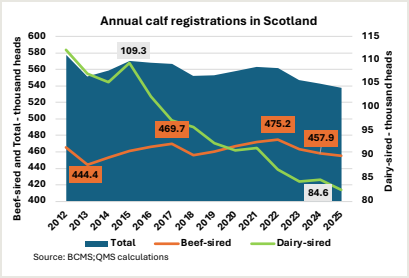
The seasonality of calvings reflects the predominance of spring calving within the beef herd, with 57.9% of beef calf registrations taking place between March and May in 2025 compared to 24.5% of dairy registrations. Overall, 52.8% of all calves were registered during the spring months.

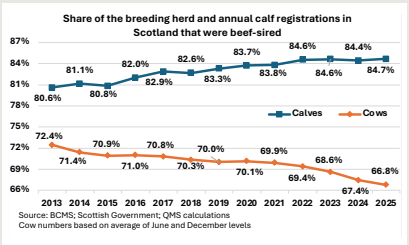
Following steady increases between 2014 and 2022, beef sired registrations fell for a third consecutive year in 2025, declining a more modest 0.6% to an eight-year low of 455,000 head[11]. However, this decline was much smaller than the reduction in beef cows.

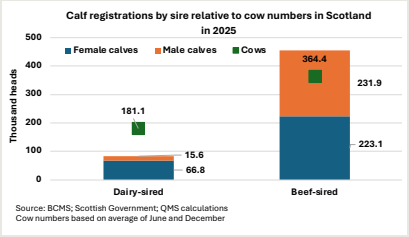
Despite growth in dairy cow numbers, dairy-sired registrations have also steadily declined over the past 13 years, falling by a further 2.5% in 2025 to reach their lowest level in 13 years. Pure dairy male registrations fell to only 15,600 head in 2025 compared to an average dairy herd in the June and December census results of 181,100 cows.

These figures highlight the structural shift in cattle production in Scotland in recent years, with dairy producers making greater use of sexed semen for female replacements and beef genetics to produce higher quality male calves.









Whilst total calf registrations continued to decline across all regions, the reductions were more evenly distributed than in 2024. For a second year, the declines in the North East (-0.9%) were smaller than in the South East (-1.1%) or North West (-1.6%), while the South West showed the smallest overall reduction (-0.7%).

11 Beef-sired registrations are all non-dairy registrations and include a small number of dual, exotic and rare breeds.

In the South West, which accounts for over half of all calvings, dairy registrations fell significantly in 2025, down 3.3%, offsetting a slight uptick in beef-sired registrations (+0.2%).

In addition to the change in structure of calf registrations away from dairy sires towards beef-sires, there has also been a shift away from continental sires.

In part due to the change in the dairy sector, Angus calvings surged in the late-2010s and early-2020s, overtaking Limousin as the most popular breed in 2020 and building further since. Angus registrations continued to lift in 2025, in contrast to an overall decline. However, British Blue registrations were down a fraction while Wagyu numbers declined by 4%.

Calf registrations in Scotland by main breed groups

Breed	2022 (% of total)	2023 (% of total)	2024 (% of total)	2025 (% of total)	% change in number of births 2025 v 2024	% change in number of births 2025 v 2015
Angus	24.9%	25.6%	26.0%	27.0%	+3.0%	+61.8%
Limousin	17.4%	16.6%	15.7%	15.4%	-3.0%	-34.8%
Black and White Dairy Breeds (90% of dairy registrations in 2025)	13.4%	13.4%	13.7%	13.8%	-0.3%	-26.0%
Charolais	12.1%	11.8%	11.8%	11.7%	-1.9%	-28.7%
Simmental	10.6%	10.3%	10.0%	9.9%	-2.0%	-28.3%
Other	21.6%	22.3%	22.7%	22.2%	-3.3%	+30.7%
Total registrations (head)	562,000	547,200	542,500	537,500	-0.9%	-5.8%

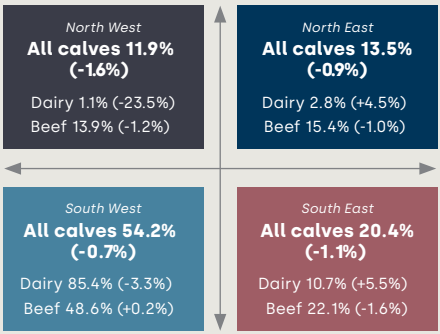
Source: BCMS; QMS calculations

Calf registrations in 2025 for selected native Scottish and British beef breeds

Shorthorn	**21,500** **4.0%** of total
Hereford	**Luing**
14,000 2.6% of total	**7,600** 1.4% of total
Galloway	**Highland**
4,000 0.8% of total	3,100 0.6% of total

Source: BCMS; QMS calculations (births rounded to nearest 100)

Calf registrations: share of national total and year-on-year change in births in Scotland by region and type in 2025

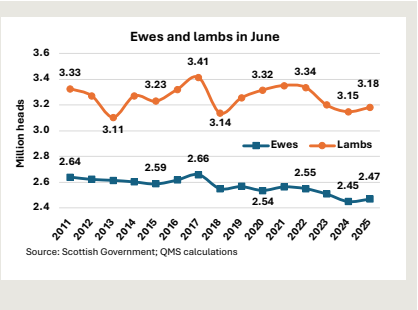


Source: BCMS; QMS calculations | Note: year-on-year changes in brackets reflect the change in share

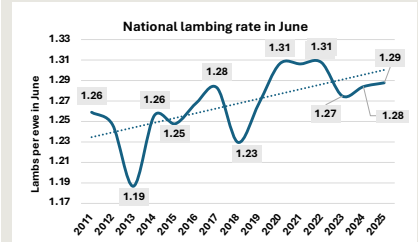
Sheep production

In the June 2025 Agricultural Census, the Scottish ewe flock size was estimated at just under 2.47m head, a slight increase of 0.7% from the year before. This follows two consecutive years of decline in 2023 and 2024 which had raised concerns after a relatively stable period between 2018 and 2022. While the 2025 rise suggests some stabilisation, ewe numbers remain approximately 1.6% below 2023 levels, down 2.7% on 2020 and 4.6% on 2015.

While ewe numbers in June have declined over the past decade, lamb numbers have shown a more stable underlying trend, driven by increased productivity. Indeed, while the 2023-25 average number of ewes was 4.8% lower than in the 2013-15 period, lamb numbers averaged 0.8% lower. Following two consecutive years of difficult lambings in 2023 and 2024, which left lamb numbers at their lowest since 2018, 2025 saw improved lambing conditions. The lambing ratio increased to 1.29 lambs per ewe and while still below the peaks recorded during 2020-22, it remained above the 1.25 average from the 2010s. As a result, the lamb crop increased by 1% to just over 3.18m head, although it remained 4.6% below the 2020-22 average.



Source: Scottish Government; QMS calculations



Source: Scottish Government; QMS calculations

Regional variation in sheep production

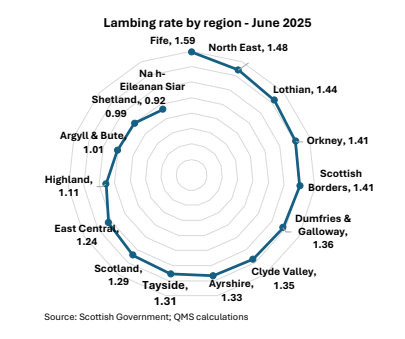
Sheep production continued to be spread slightly more evenly across Scotland than cattle in June 2025. Above-average lambing percentages meant that the Scottish Borders, Dumfries and Galloway and the North East accounted for larger shares of the national lamb crop than of the ewe flock, whereas the opposite was true for the Highland region.

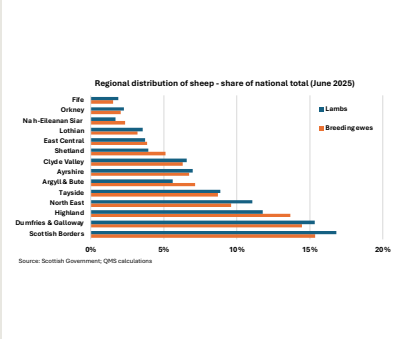
Regional variation in lambing performance is generally reflective of land and climate, as well as farming structure, with performance typically weaker in areas of the country with a higher proportion of remote upland grazing.

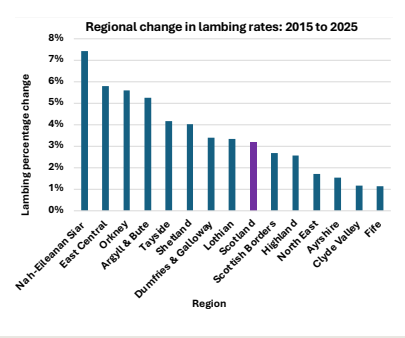
Over the past decade, lambing rates have increased across all regions of Scotland, reflecting widespread productivity gains. Improvements have been strongest in historically lower productivity areas. While Fife records the highest lambing rate, it has seen relatively limited gains over time, whereas the Western Isles continue to have the lowest lambing rate but have delivered the largest productivity improvements.

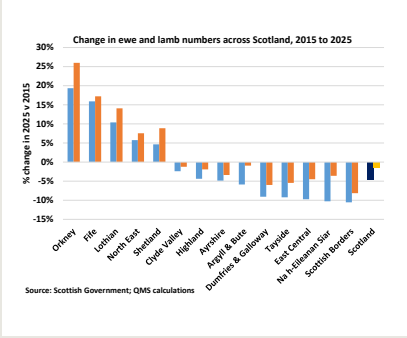
Despite productivity gains, overall sheep numbers have continued to vary by region. Over the last 10 years, flock contraction has been concentrated in some of Scotland's largest sheep producing areas such as the Scottish Borders and Dumfries and Galloway which account for a large part of the national fall in both ewe and lamb numbers. The Scottish Borders alone accounted for 38% of the national decline in ewes and 97% of the decline in lamb numbers. Meanwhile, declines in Dumfries and Galloway were equivalent to 30% of the national decrease in ewes and 63% of the reduction in lambs. In contrast, the North East stands out as the only major producing region to record an increase in sheep numbers over the period. This could reflect its better land and productive farming systems, while sheep may have been added to support mixed farming businesses.

Looking at the regional distribution of sheep in terms of land quality, there has been a slight shift away from LFA regions over the past decade.







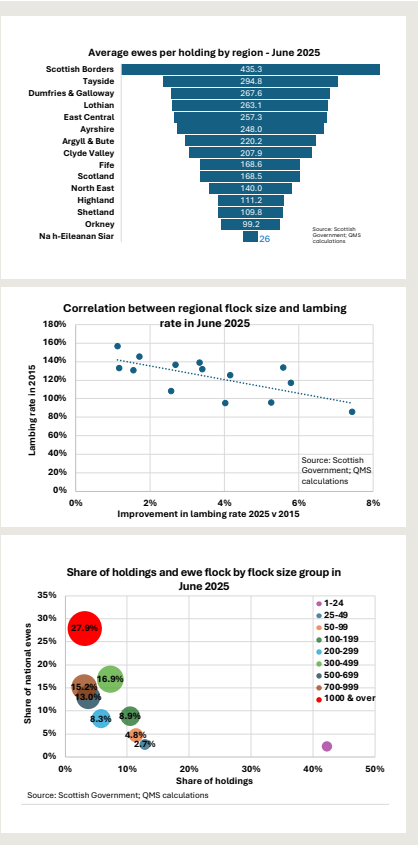


Flock size

There was an average of 168.5 breeding ewes per holding in Scotland in June 2025, continuing the decline from 176 in June 2023 and 170.7 in 2024. This reduction was despite a slight increase in the total number of ewes nationally during 2025 and reflects a continued rise in the number of holdings keeping sheep. The North East region showed a considerable increase in the number of holdings with ewes, up almost 5% over the year compared to a 2% increase across the country.

Lambing performance and flock size do not correlate perfectly across Scotland. Regions such as Fife, the North East and Orkney which had below average flock sizes in 2025, ranked among the top four for lambing rate. This could reflect that sheep enterprises may be a smaller part of a mixed farming businesses in areas like the North East while tending to be specialist large hill or upland flocks in areas like the Borders and Perthshire (within the Tayside region).

Holdings with above-average flock sizes accounted for more than 80% of the national ewe flock in 2025. Around 81% of ewes were on holdings with at least 200 ewes, while 43% were on holdings with 700 or more ewes, despite these accounting for just 6.2% of holdings. At the other end of the scale, 42.3% of holdings had fewer than 25 ewes, but they accounted for only 2.3% of the national breeding flock.



Pig production

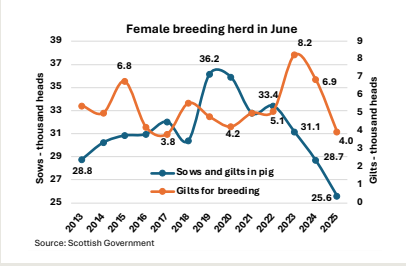
Scotland's female pig breeding herd numbers tend to be volatile from year-to-year in the June census, with annual changes averaging around 6.5% over the past decade.

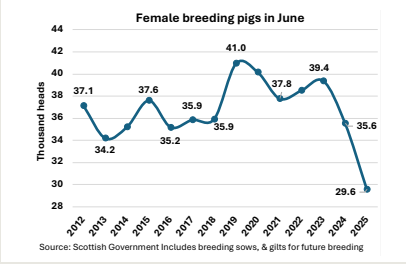
In June 2025, at 25,617 head, the female breeding herd had contracted by almost 11% year on year, remaining well below the previous recorded low in 2013.

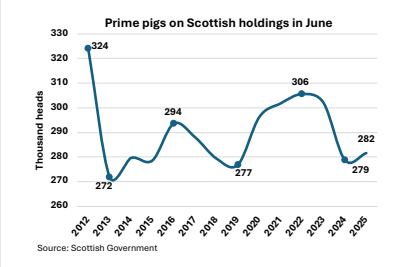
Meanwhile, the number of gilts retained for future breeding continued to fall, declining by 42% over the last year and almost 52% below the peak reached in 2023. Levels are now below the average of the past decade. When combining the sow herd and gilts for future breeding, the total number of female breeding pigs continued to fall sharply in 2025, declining by another 17%.

For comparison, England's June census pointed to a continued decline in the sow herd, down 5.3%, with the December results for England then showing an accelerated 6.5% decline. Gilts for breeding showed a more positive trend, with a slight increase in June strengthening to an 11% rise by December, potentially as producers looked to increase replacement rates and boost productivity in response to challenging market conditions. When combining sows and gilts in-pig with gilts for breeding, the total in England in June 2025 was 22% lower than when the sector entered its previous crisis in 2021, matching the reported decline over the same period in Scotland.

In Scotland, the June 2025 census showed a small improvement in prime pig numbers, increasing by 1% from the year before, signalling increased productivity. However, numbers were still below the highs of 2020-23 (-6.6%).







ScotEID deaths data points to a slightly different picture in recent years, with pig movements from Scottish farms to abattoirs in Scotland and England showing a fluctuating pattern. Following a rebound in 2024, numbers declined in 2025, although the backlog on farm saw the deficit grow from around -1.5% at the end of the third quarter to around -3.5% by the year-end.

Productivity continued to strengthen in 2025, with prime pig numbers at 11 times the sow herd level in June 2025, up 1.3 pigs per sow on the year and marking the highest ratio since 2012.

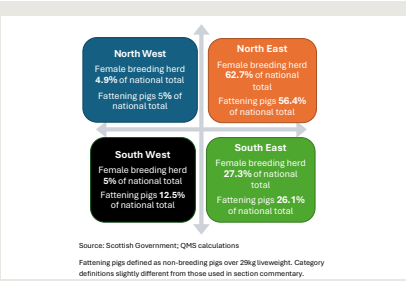
Regional spread of pig production in Scotland

The regional breakdown of the June 2025 census results continued to highlight the heavy concentration of pig production in eastern Scotland, with around 90% of pigs living there. The North East and Tayside combined accounted for 70% of the sow herd and 61% of all other pigs in 2025. Meanwhile, 19% of the sows and over 25% of all other pigs were kept in Lothian and Borders.

The 2025 regional data pointed towards some movement of weaner pigs for fattening from the North East to South East. Fife and the Borders recorded higher shares of non-breeding pigs than their share of the national sow herd, in contrast to the North East, where they have a much higher share of the breeding herd. However, Lothian is geared towards breeding. Clyde Valley, East Central and Dumfries and Galloway also appeared to see an inflow of fattening pigs. These three areas accounted for around 8% of the national total for all other pigs but only 4% of sows.

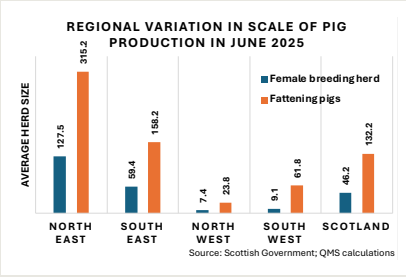
Pig production is heavily concentrated into a relatively small number of herds. Of the 555 holdings with sows in June 2025, just 30 had at least 250 sows, yet accounted for 84% of the national herd. These larger holdings kept an average of 719 sows, compared to a national average of only 46.

In June 2025 there were 100 Scottish holdings with at least 100 fattening pigs, accounting for 95% of the national total, and averaging 1,335 head each. In total, 1,060 holdings kept fattening pigs.

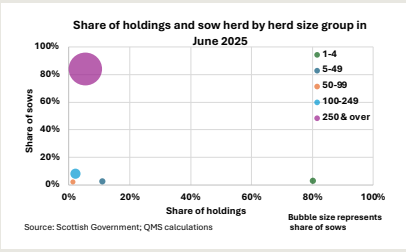


Source: Scottish Government; QMS calculations

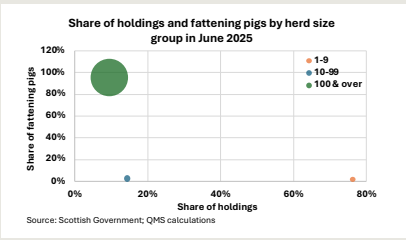
Fattening pigs defined as non-breeding pigs over 20kg liveweight. Category definitions slightly different from those used in section commentary.



Source: Scottish Government; QMS calculations



Source: Scottish Government; QMS calculations



Source: Scottish Government; QMS calculations

Farming output

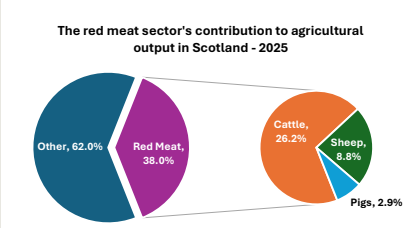
In 2025, the Scottish Government estimated that total agricultural output excluding coupled subsidies, increased slightly to £5.02bn.

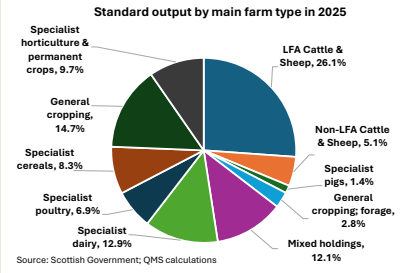
Highlighting the importance of the red meat sector to Scottish agriculture, cattle, sheep and pig production accounted for 38% of total agricultural output. Combined output from these sectors totalled £1.9bn, led by beef at £1.32bn, with contributions of £443m from sheep and £146m from pigs.

Cattle and sheep production remained more significant to Scottish agriculture than the average across the UK and EU[12].

Scottish Government standard outputs for different farm types based on their principal enterprise in 2025 highlights revenues from livestock and arable farming before accounting for input costs[13]. Cattle and sheep farmers generated £813m in revenue, accounting for 31.3% of total standard output, with specialist pig farms contributing a further £35.2m, 1.4% of the total.

In addition, £316m and 12.2% of revenue came from mixed farms, a significant proportion of which is likely to have been generated from livestock production. A further 2.8% of standard output related to forage production, much of which supports livestock systems.





Contribution to agricultural output (%) in 2025

Scotland	UK
cattle 26.2	cattle 15.9
sheep 8.8	sheep 4.9
pigs 2.9	pigs 5.7

Ireland	EU27
cattle 28.8	cattle 7.2
sheep 2.7	sheep 0.9
pigs 5.3	pigs 8.8

Source: Eurostat; Scottish Government; QMS calculations

12 EU and Ireland sourced from Eurostat – production value at producer price as a share of output of the agricultural industry. UK sourced from Defra and includes output and capital formation as a share of total output at market prices.

13 The threshold for a farm type allocation is generally two-thirds of output, with mixed farms those where no enterprise type accounts for at least two-thirds of output.

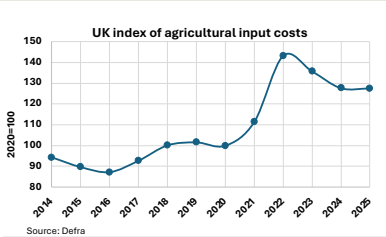
Producer input costs

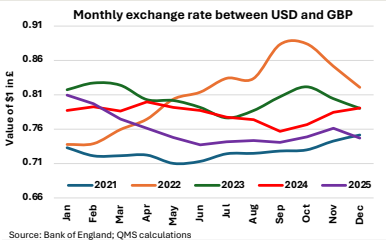
After a surge in 2022, UK agricultural input costs, as reported by Defra, declined in 2023 and 2024, as many of the commodity price shocks linked to the Covid-19 pandemic and the conflict in Ukraine unwound, before steadying in 2025. In addition, a stronger sterling against the US dollar helped soften the cost of imported inputs between 2022 and 2025, many of which are often priced in dollars. In 2025, agricultural input costs averaged just 0.1% lower than in 2024 but almost 11% lower than their 2022 peak. However, the overall inputs index remained historically high: 27% above pre-covid levels.

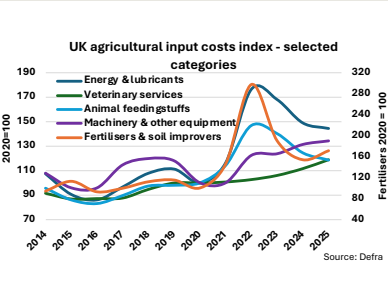
After fertiliser costs doubled in 2022, prices fell back in 2023 and 2024 before increasing again in 2025, rising by 11.2% year-on-year. By the end of 2025, fertiliser prices remained almost 50% above the 2019 average, and well above the previous peak experienced during the 2008 oil and gas market boom. Meanwhile, energy and fuel costs declined more modestly in 2025 than in the previous year, falling by 3%, while feed costs decreased by 4.7%. Despite these reductions, by year end, energy and fuel costs were still 30% above 2019 levels and feed costs remained 21% higher.

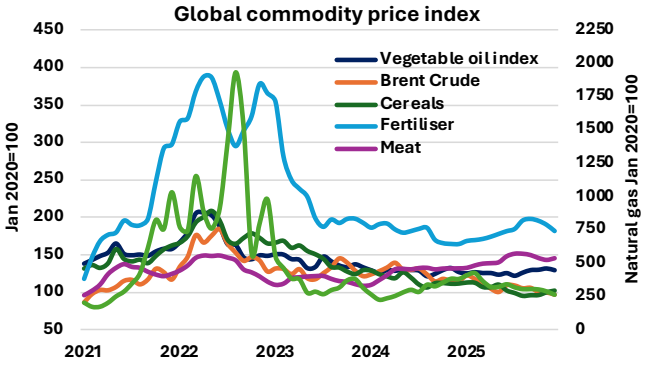
In contrast to the cost of commodities, prices for machinery, buildings and other equipment continued to rise in 2025, increasing by 2.3% year-on-year with veterinary services rising by a further 6.5% in 2025.

The red meat processing sector continued to face elevated production costs in 2025, as although many commodities may have fallen back from their peak, livestock and labour became more expensive. After only edging higher in 2024, the Office for National Statistics (ONS) producer price index for materials and fuels used in the preserved meat and meat products sector rose by 3.1% in 2025, pushing it 41.4% above 2019 levels.

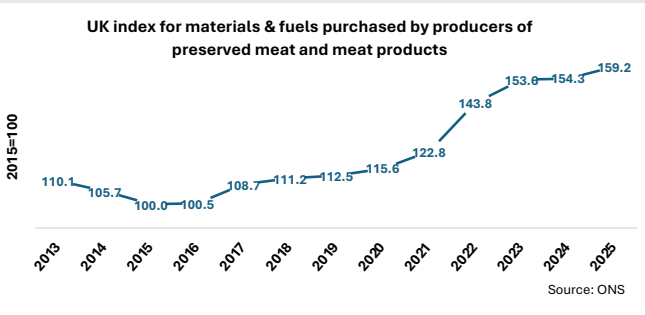




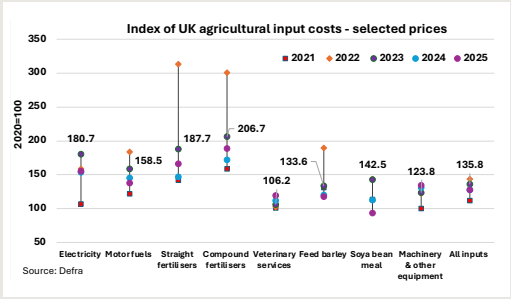




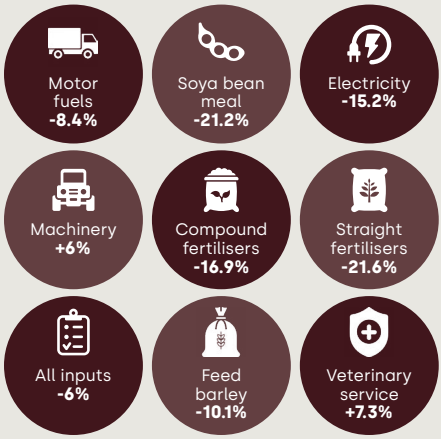
Source: IMF; re-based to January 2020 = 100 by QMS



Source: ONS



Source: Defra



Primary Processing

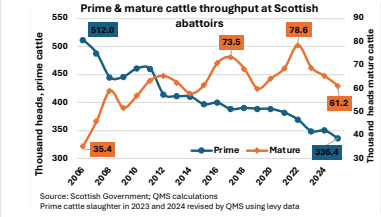
Supply of livestock in the processing sector

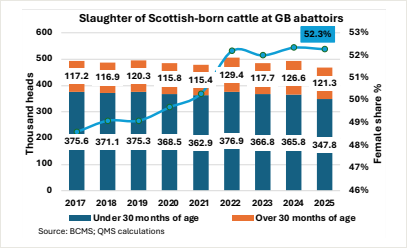
Cattle

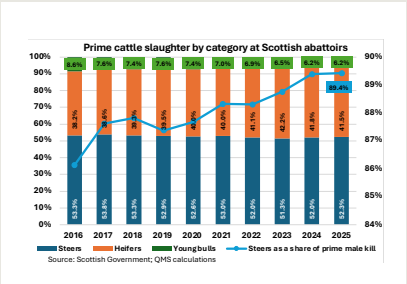
After rebounding slightly in 2024, prime cattle slaughter at Scottish abattoirs fell again in 2025, declining by 4% to 336,400 head[14]. This left numbers down by 13.5% on 2020, 15% on 2015, 27% on 2010, and 36% on 2005.

After supply chain rebalancing in 2023, things settled down in 2024, but the volatility resumed in 2025. The speed and scale of the farmgate cattle price surge in the first third of the year meant that higher prices had to quickly pass through the supply chain to consumers. In response, the volume of demand fell significantly and processor demand for cattle fell accordingly, leading to a considerable reduction in cattle slaughter through the summer months. This downward pressure was added to by the closure of one of the country's large abattoirs in June. Having been up marginally year-on-year in the first five months of 2026, prime cattle throughput then fell by an estimated 8% in the final seven months of the year.

Continuing on from a 2024 decline, the heifer share of kill dipped slightly again in 2025, following seven consecutive years of growth. Meanwhile, the male kill continued to rebalance towards steers, despite the young bull share stabilising for the first time in five years.







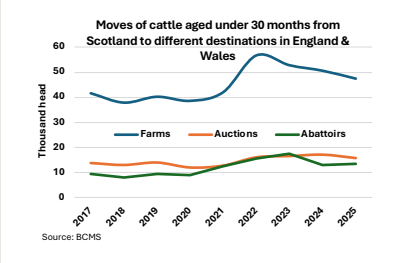
14 Annual slaughter based on a 52-week year, ending 28 December 2025. Slaughter has been adjusted by QMS to reflect levy data, with cattle allocated to prime and adult categories in 2023 and 2024 based on the Scottish Government's slaughter survey.

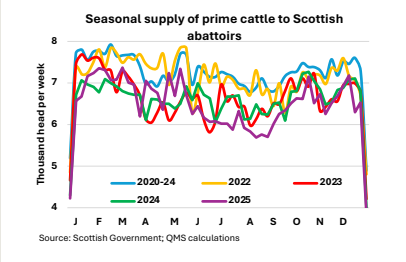
The total number of cattle born in Scotland and slaughtered at under 30 months of age at GB abattoirs continued to decline from its 2022 peak, falling almost 5% in 2025. Relative to the average level of calf registrations in the previous two years, slaughter was down more than two percentage points from both 2024 levels and the average for 2017-24. Within this total, the female kill decreased by 4.5% year-on-year while male numbers declined by 5.2%. Despite these reductions, the female share of the under-30-month kill rose slightly by 0.2 pp to 39.8%, remaining well above 2017-22 levels.

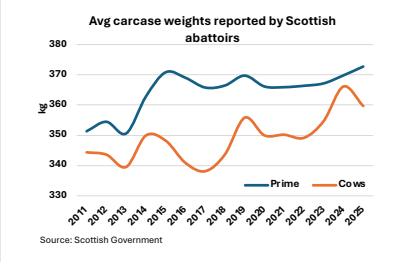
Despite the continued fall in the number of cattle aged under 30 months leaving Scotland for England and Wales in 2025 (-4.9%), movements remained well above 2017-21 levels, while the number going to abattoirs edged up. Moves to farms fell by another 6% in 2025, leaving them 16% below the 2022 peak, but were still 18% above the 2017-21 average.

Mature cattle slaughter at Scottish abattoirs declined further from its 2022 peak, falling to a six-year low in 2025[15]. The total is estimated at 61,200 head, a 6.5% decrease. This included just over 800 adult bulls. Reduced cow slaughter was influenced by a lower slaughter rate for females aged over 30 months, likely reflecting the impact of higher store and finished cattle prices on producer confidence.

Following the previous year's rebound in the number of Scottish-born cattle slaughtered at over 30 months in Great Britain, numbers fell again by 4.2% in 2025. There was a widening gap between male and female slaughter in 2025, with male slaughter increasing (+5.2%) while female slaughter declined (-5.3%), reflecting an increased kill of older steers. The number of cattle aged over 30 months moving from Scottish farms to English abattoirs decreased by 11% in 2025, following a 20% increase in 2024, limiting the decline in cow slaughter at Scottish abattoirs.







The average prime cattle carcase weight in the Scottish Government's slaughter survey reached a six-year high at Scottish abattoirs in 2025, up by 2.9kg (0.8%) to 372.7kg. This average weight was around 3% higher than if it had been based on the weights reported in the deadweight price reporting sample (361.6kg). Weights are likely to have been pushed up by the combination of relatively cheap feed and elevated store cattle purchase prices.

15 The 2022 record is based on the period since slaughter of cattle aged over 30 months for the food chain resumed in the mid-2000s, with adult cattle slaughter estimates for 2023 and 2024 adjusted to reflect levy data.

While the predominance of beef breeds means that category average carcase weights are well above the GB average in Scotland (5%-6.5% for prime cattle and 14% for cows in 2025), weights for specific grades are not always higher than at price reporting abattoirs in England and Wales. Indeed, in 2025, R4L steers and O+3 cows averaged marginally lighter at Scottish abattoirs than in England and Wales.

Carcases which exceed the target weight range to meet product specifications for prime cuts of beef sold by UK supermarkets often face pricing penalties, particularly at times of the year when supply is stronger relative to demand. However, there have been signs that this position has softened since 2024, with steer weights rising by 1% in 2024 and 2025 to come within 1% of their 2015 peak. The average in 2025 rose 2.7kg to 388.5kg.

Increased weights in 2025 offset some of the decline in throughput, but prime beef output still fell by an estimated 3.7% to 125,400t. However, a dip back in cow carcase weights in 2025 after a jump higher in 2024 added to the decline in mature cattle throughput, lowering cow beef output by 5.9%, with an estimated 22,100t produced.

The net result was an estimated 4% reduction in beef production at Scottish abattoirs in 2025, slipping to 147,500t. This was 20% below the 21st-century peak of 185,000t in 2006 and 2007, and almost 13% lower than in 2015.

Average carcase weights

	Scotland				UK	
	2020-24	2023	2024	2025	2024	2025
	kg per head					
Steers	381	381	385	388	368	371
Heifers	348	349	350	353	331	335
Young bulls	371	375	378	381	364	368
All prime cattle	367	367	370	373	353	356
Cull cows	354	355	366	360	313	313

Source: Defra; Scottish Government; QMS calculations

Note: UK carcase weights adjusted to same specification as Scottish weights based on conversion rates when Defra changed reporting method in September 2019 to exclude kidney knob and channel fat (+2.9%)

Carcase weights for selected grades at price reporting abattoirs

Scotland

Carcase weights

- R4L steers
  371.8kg (+1.0kg v 2024)
- R4L heifers
  337.2kg (+1.2kg v 2024)
- R3 young bulls
  356.7kg (+0.3kg v 2024)
- R4L cows
  394.6kg (-0.3kg v 2024)

England & Wales

Carcase weights

- R4L steers
  372.6kg (-1.3kg v 2024)
- R4L heifers
  336kg (+1.2kg v 2024)
- R3 young bulls
  356.5kg (+0.9kg v 2024)
- R4L cows
  392.1kg (+0.8kg v 2024)

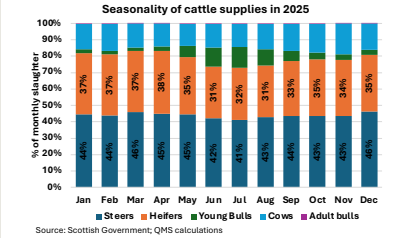
Source: AHDB

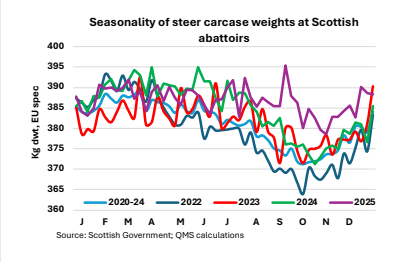
Note: Weights reported in UK spec for the most common grade in each category at Scottish reporting abattoirs in 2025; an estimated 83% of the prime cattle kill at Scottish abattoirs was deadweight price reported in 2025 (85% in 2024) and 77% at English and Welsh abattoirs (74% in 2024).

Seasonality of cattle production

Steers and heifers accounted for 79% of the cattle processed at Scottish abattoirs in 2025, with an annual peak of 83% in March and April and a low in July at 73%. Young bulls accounted for just over 5.5% of the annual kill but exceeded this between May and August, peaking at 13% in July. Cows accounted for 16% of the kill, peaking at 19% in November, with an annual low of 13% in May.

The seasonal pattern in carcase weights at Scottish abattoirs reflects the dominance of spring calving in Scotland's beef herd. In the spring, prime cattle are slaughtered at around two years of age compared to around 18 months in the autumn. Weights remained higher than normal in summer and autumn 2025, reflecting soft demand from abattoirs, elevated store purchase prices and relatively low feed costs.





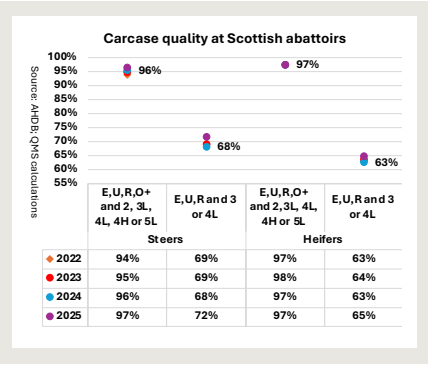
Cattle carcase quality

To be labelled as Scotch Beef, eligible animals must also meet product specifications. Carcases must be classified as either 2, 3, 4L, 4H or 5L for fat cover and E, U, R or O+ for conformation.

Steer carcases by grade at Scottish abattoirs in 2025

	3	4L	4H
-U	9.3%	12.1%	1.4%
R	19.8%	27.2%	6.0%
O+	5.1%	6.6%	0.8%
-O	1.5%	1.0%	0.0%
Others: 9.1%			

Source: AHDB; QMS calculations



	Steers		Heifers	
	E,U,R,O+ and 2, 3L, 4L, 4H or 5L	E,U,R and 3 or 4L	E,U,R,O+ and 2,3L, 4L, 4H or 5L	E,U,R and 3 or 4L
2022	94%	69%	97%	63%
2023	95%	69%	98%	64%
2024	96%	68%	97%	63%
2025	97%	72%	97%	65%

Based on the proportion grading E, U or R for conformation and 3 or 4L for fat cover, carcase quality for steers and heifers improved at Scottish abattoirs in 2025, notably so for steers.

R4L continued to be the most common grade for steers and heifers at Scottish abattoirs in 2025, while R3 remained the most common for young bulls having overtaken the -U3 grade in 2021. Cows continued to have a much more even distribution. Reflecting the dominance of specialist beef production in Scotland, carcases tend to have higher conformation and fat cover than in England and Wales.

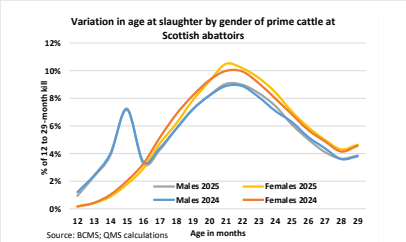
Most common grades at price reporting abattoirs in 2025					
Category	Position	Scotland		England and Wales	
		Grade	Share of total	Grade	Share of total
Steers	1st	R4L	27.2%	R3	27.2%
	2nd	R3	19.8%	O+3	16.2%
	3rd	-U4L	12.1%	R4L	13.3%
Heifers	1st	R4L	33.8%	R3	23.6%
	2nd	R4H	13.8%	R4L	18.9%
	3rd	-U4L	11.7%	O+4L	12.0%
Young bulls	1st	R3	21.5%	R3	21.3%
	2nd	-U3	18.3%	R2	20.2%
	3rd	R4L	9.4%	-U3	8.4%
Cows	1st	R4L	10.9%	-P1	16.4%
	2nd	-O3	8.7%	P+2	12.8%
	3rd	R3	8.6%	P+1	11.2%

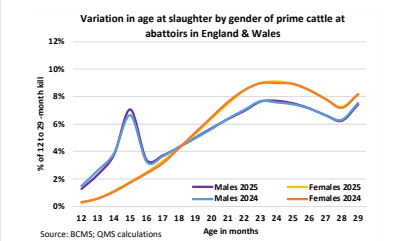
Source: AHDB

Age of cattle at slaughter

At Scottish abattoirs, the cattle age at death increased further in 2025, with females showing a more significant change than males, where it was more marginal. For males, there was a small shift between the 12-17 and 18-23-month groups, with a fractional dip in share for the older 24-29-month group, which had seen a significant lift in 2024. For females, the share slaughtered at 18-23 months was unchanged at 53.5% while there was a dip of around a percentage point at 12-17 months and a similar sized rise at 24-29 months.

In England and Wales, after increasing in 2024, age at death proved more stable in 2025. For males, there was little difference, while for females, the share became slightly more balanced, with marginal increases in the younger 12-17 and older 24-29-month age groups offsetting a small dip at 18-23-months.





Increased age at death could reflect structural change in the dairy sector, with a higher proportion of slower finishing beef-sired dairy steers and heifers reaching abattoirs than in the past.

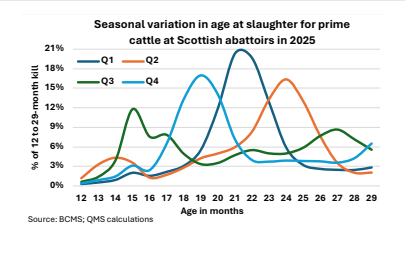
The median age at death in Scotland for cattle aged 12-29 months edged up from 21-22 months for the first time in six years. In England and Wales, the median age remained 23 months for both males and females, with males just above the 23-month threshold and females just under the 24-month mark.

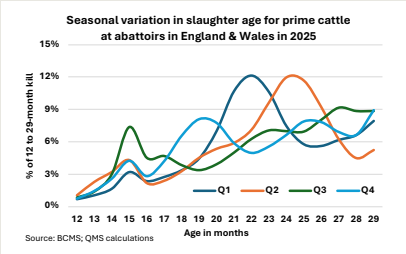
Change in average age at death for cattle aged 12-29 months at Scottish abattoirs, 2019-25

	Median age at death in months			% slaughtered at under 22 months		
	All	Males	Females	All	Males	Females
2019	22	22	22	48.0%	49.8%	45.3%
2020	21	21	22	50.4%	52.8%	46.7%
2021	21	21	22	53.4%	55.7%	49.8%
2022	21	21	22	52.3%	54.8%	48.6%
2023	21	21	22	52.6%	55.0%	49.2%
2024	21	21	22	50.2%	52.7%	46.6%
2025	22	21	22	49.3%	52.4%	44.9%

Source: BCMS; QMS calculations

Quarterly age at slaughter shows a similar seasonal pattern through the year at abattoirs in Scotland and in England and Wales, linked to the age of spring-born cattle. However, the greater dominance of spring calving in Scotland means that this link is stronger north of the border, resulting in more intense seasonal variation.





Sheep

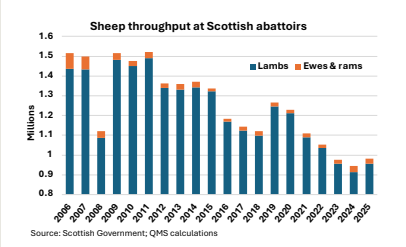
Having declined for five consecutive years, prime sheep slaughter rebounded at Scottish abattoirs in 2025, lifting nearly 5% to an estimated 957,400 head. Squeezed margins in cattle processing may have contributed, with sheep slaughter rising most strongly in the middle of the year. A late arrival of hoggs also supported this mid-year strength. While rebounding, numbers are still estimated to have been down almost 20% on 2020 levels, 27.5% on 2015 and by more than a third from 2010. It is estimated that around 90% of the lambs slaughtered at Scottish abattoirs moved directly from Scottish farms, highlighting that lambs sold at Scottish auctions tend to be processed in England and Wales.

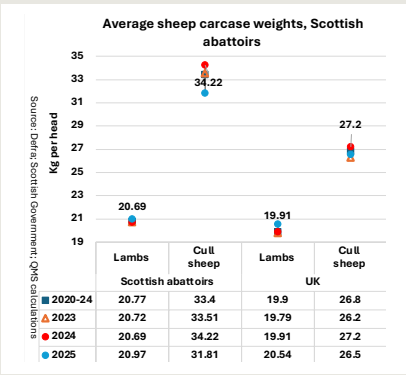
Scottish abattoirs are estimated to have handled a net figure of around 35% of the Scottish-born lambs sent for slaughter in 2025. This has been based on an estimated 80% of the GB lamb crop being sent for slaughter in GB and takes into account the marketing pattern of the 2024 and 2025 lamb crops at Scottish auctions, with a higher share of the 2024 lamb crop being processed in 2025.

After surging in 2024, the number of ewes and rams processed by Scottish abattoirs is estimated to have fallen back significantly in 2025, but remained elevated above the levels of recent years. After approaching 30,000 head in 2024, the 2025 total is estimated to have dropped back below 23,000 but remained well above the 2015-23 average of 18,700 head. Scottish abattoirs are estimated to have still handled under 5% of the ewes and rams sent to slaughter from Scottish farms.

After steadying in 2024, prime sheep carcase weights increased by an average of 1.3% in 2025 at Scottish abattoirs, reaching just under the 21kg mark and coming within a fraction of the 2022 peak. Average weights remained significantly heavier at Scottish abattoirs than the average at UK abattoirs, although the gap almost halved to 0.4kg and 2.1%. This was a record low, dating back to at least 2002.

Due to heavier weights, lamb production volumes outpaced abattoir throughput, rising by an estimated 6.1% to reach 20,100t. By contrast, a sharp 7% reduction in ewe carcase weights added to the decline in throughput, lowering mutton production by nearly 24% to just over 700t. The net result was that overall sheepmeat production expanded by 4.3% to an estimated total of 20,800t. This was still a steep reduction of nearly 16% from 2020, 23% from 2015 and 29% from 2010.

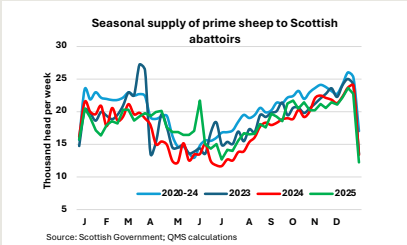




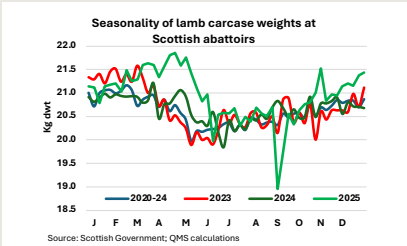
Seasonality of sheep production

Lamb production shows much more significant seasonal fluctuations than cattle or pig production. On the supply side, lambs are born at a similar time of year while, on the demand side, consumption tends to peak around key Christian and Islamic festivals. Compared to England and Wales, Scotland's climate and topography result in a much slower arrival of new season lambs and a higher share is processed in the following calendar year, at elevated carcase weights.

After a slow start to 2025, lamb throughput exceeded year-earlier levels for most of the time between April and October, with numbers then falling back behind 2024 in the final two months of the year. The strongest year-on-year growth in slaughter came during the second quarter, with a 23% increase. A delayed arrival of hoggs also boosted carcase weights more strongly than usual in the second quarter. After a limited upturn around Easter, Eid al-Fitr and Eid al-Adha in 2024, there were much stronger uplifts in 2025, particularly ahead of Eid al-Adha at the start of June, which had the highest kill of the year until mid-December. At the opposite end of the scale, throughput slumped to its annual low in July, although numbers still held well ahead of 2024.



Source: Scottish Government; QMS calculations



Source: Scottish Government; QMS calculations

Lamb carcase quality

Carcase quality steadied at GB price reporting abattoirs in 2025, with an unchanged 58.7% of Standard Quality Quotation (SQQ)[16] carcases grading at E, U or R for conformation and 2 or 3L for fat cover. However, this followed three years of declines from a 2021 peak of 66.8%.

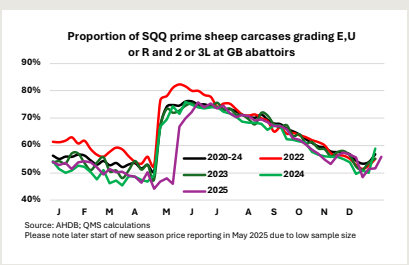
There was a considerable shift towards the barometer R3L grade in 2025, lifting 2.6 pp to 35.6%. For conformation, there was a shift away from U grades towards R grades while, for fat cover, there were moves from 2 and 3H towards 3L. Nevertheless, U3L had the largest shift away, dropping 1.4 pp to 6.4%.

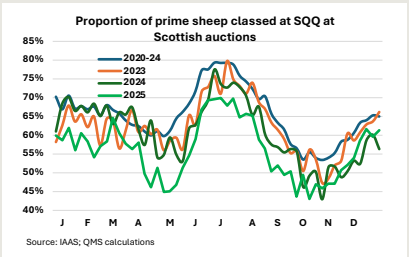
SQQ lamb carcases by grade at GB price reporting abattoirs in 2025

	2	3L	3H
U	1.8%	6.4%	2.3%
R	14.0%	35.6%	11.6%
O	9.6%	10.3%	2.6%
Others	5.7%		

Source: AHDB; QMS calculations

A further proxy of lamb quality is the proportion of prime sheep sold at auction markets that qualify as SQQ due to their live weight at sale (25.5-45.5kg liveweight). After a considerable decline of 9.0 pp in 2022, and a further reduction of 1.2 pp in 2023, the proportion stabilised in 2024 before falling significantly again in 2025, slipping 4.4 pp to 55.4%. Heavier live weights were consistent throughout most of the year, although the SQQ proportion did run higher than in 2024 in five of the last seven weeks of the year.





SQQ lamb carcase distribution at GB price reporting abattoirs

	Proportion grading E,U or R and 2 or 3L	Most common		2nd most common		3rd most common	
		Grade	Share of total	Grade	Share of total	Grade	Share of total
2023	61.1%	R3L	32.8%	R2	15.0%	R3H	10.7%
2024	58.7%	R3L	32.9%	R2	14.4%	R3H	11.8%
2025	58.7%	R3L	35.6%	R2	14.0%	R3H	11.6%

Source: AHDB; QMS calculations

16 SQQ stands for Standard Quality Quotation. In deadweight price reporting, this encompasses carcases weighing between 12 and 21.5kg, while in auction market price reporting, it encompasses live lambs sold at weights of 25.5-45.5kg.

Pigs

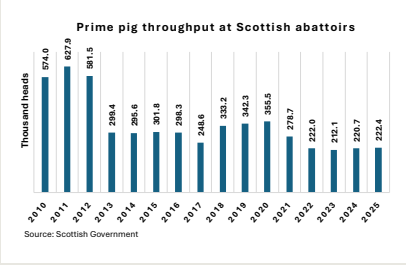
Prime pig slaughter at Scottish abattoirs increased for a second consecutive year in 2025, up 1.1% at 222,200 head. Nevertheless, numbers were still well below the 2020 level (-38%), which had been the high point since the closure of Broxburn abattoir in 2012. On a weekly basis, slaughter increased to an average of just over 4,270 head.

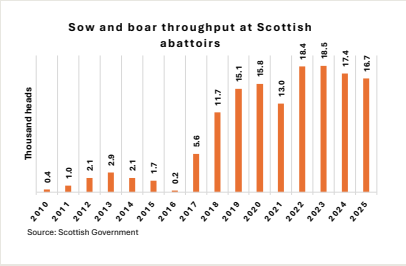
However, sow and boar throughput fell back further from the highs of 2022 and 2023, reflecting a smaller breeding herd. Numbers fell by another 4% to 16,700 head, averaging around 320 head per week.

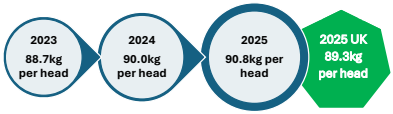
A total pig kill at Scottish abattoirs of 238,800 head indicates that approximately 55% of the Scottish-born pigs being sent directly for slaughter from Scottish farms went to abattoirs in England, down from around 58% in 2024.

Prime pig carcase weights are estimated to have risen further in 2025, with the annual average carcase weight estimated to have reached a new high of 90.8kg, lifting 0.8kg and 0.9% from 2024, influenced by some slight productivity growth and a backlog of pigs on farm in the final quarter. As well as some slight productivity growth, weights were pushed up by a backlog on farm in the final quarter as delayed slaughter quickly pushed up weights due to fast growth rates. Weights were 6% higher than in 2020, 13% higher than in 2015, and 16% above 2010 levels, highlighting the underlying long-term upwards trend.

The combination of increased throughput and weights led to a 2% uplift in prime pigmeat production in 2025, reaching 20,200t. By contrast, lighter weights combined with reduced throughput to push down sow meat production by nearly 5% to 2,400t. Total pigmeat production is estimated to have reached a four-year high of 22,600t (+1.3%).







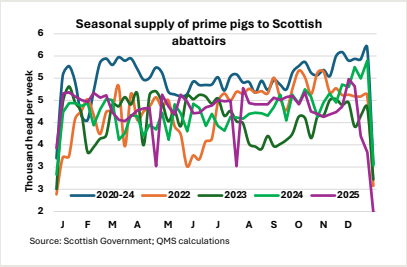
Source: Scottish weights are estimated by QMS using the Scottish Government's slaughter survey and AHDB's SPP price reports; UK weight converted into EU spec by QMS from Defra slaughter statistics and AHDB deadweight price reports

Average carcase weights (EU spec) of clean pigs in Scotland

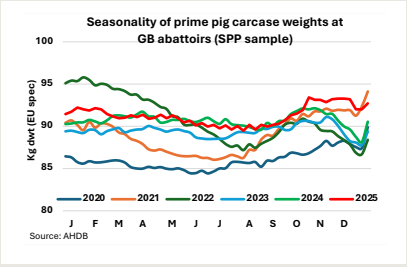
Seasonality of pig production

Prime pig slaughter has less of a seasonal trend at Scottish abattoirs than in the UK as a whole, where production tends to fall to its lowest levels in the summer months. Given the high share of pigs crossing the border to be slaughtered in England, throughput in Scotland is more likely to reflect variables like customer demand and labour supply than availability of pigs for slaughter.

Prime pig carcase weights have a seasonal profile, tending to be at their lightest through the summer months and heaviest in winter. Weights fall in the run up to Christmas and rebound sharply as slaughter age adjusts to fit the shorter working weeks. In 2025, a backlog of pigs on farm resulted in a stronger than usual rise in carcase weights in the autumn, followed by a more limited seasonal decline in December.



Source: Scottish Government; QMS calculations



Source: AHDB

Scottish abattoir output and employment

19 red meat abattoirs operated in Scotland in 2025 and submitted levy returns to QMS, unchanged from 2024, although one of these sites closed in 2025. Cattle slaughter took place on 17 sites, with sheep slaughter on 14, while only eight handled pigs. The sheep and pig totals were down one from 2024.

Based on weighting abattoir throughput by the different levels of carcase weights in the sector, cattle are estimated to have accounted for approximately 77% of abattoir production in 2025, with sheep at 11% and pigs accounting for 12%. This is quite different from a UK abattoir production split of 42%, 13% and 46% respectively. The volume of abattoir production in Scotland is estimated to have fallen 2.6% in 2025, with reduced cattle throughput more than offsetting heavier carcase weights and slightly higher lamb and pork output.

Scottish abattoir output									
	Number of animals			Volume of meat (t)			Estimated sales value (£m)		
	2024	2025	y/y change	2024	2025	y/y change	2024	2025	y/y change
Cattle	415,900	397,600	-4.4%	153,700	147,500	-4.0%	820	1,037	+26.4%
Sheep	944,300	980,200	+3.8%	19,900	20,800	+4.3%	156	168	+8.1%
Pigs	237,000	238,800	+0.8%	21,900	22,600	+1.3%	65	63	-2.4%
Combined	1,597,100	1,616,700	+1.2%	195,900	190,900	-2.6%	1,040	1,268	+21.9%
Offal							73	77	+4.9%
Skins and hides							18	16	-12.7%
Total output							1,132	1,361	+20.2%

Source: QMS Processor Survey; QMS levy returns, QMS calculations and estimates; Scottish Government

2024 based on 52 weeks to 29 December 2024; 2025 based on 52 weeks to 28 December 2025

Slaughter numbers and tonnage rounded to nearest 100; sales value rounded to nearest million

Turnover from primary red meat processing in Scotland is estimated to have surged in 2025, lifting 20% to £1.36bn, driven mainly by higher cattle prices. It should be noted that estimates for previous years have also been revised slightly lower. Higher revenue from beef, lamb and offal was partially offset by lower turnover from pork, hides and skins.

In cattle processing, higher turnover reflects a modelled increase in wholesale prices for beef and offal plus heavier carcase weights more than offsetting a significant reduction in abattoir throughput and reduced hide values. Increased wholesale sheepmeat and lamb offal prices and a rebound in slaughterings are estimated to have more than offset lower sheepskin values. By contrast, turnover from pig processing is estimated to have dipped slightly for a second year as falling wholesale prices for pork and fifth-quarter products more than offset a slight lift in slaughter.

Reflecting the continuing tightness of labour supply, productivity gains and structural change within the sector between 2024 and 2025, employment in the primary processing sector is estimated to have fallen 3%, slipping below 2,400 in 2025 compared to a downwardly revised estimate of just above 2,400 in 2024. However, a fourth year of significant wage growth (+4.5%) is estimated to have more than offset the decline, resulting in the total amount paid out in primary processing wages rising 1.4% to an estimated £77m.[17] In the UK manufacturing sector, average wages rose by nearly 5% in 2025, taking them almost 30% above 2019 levels.

17 The estimated wage bill is based on average wages and salaries reported by processing companies in accounts filed with Companies House for 2024, plus ONS figures for manufacturing earnings growth in 2025 (series K55I). Please note that the estimate for total wages paid in 2024 has been revised down to £75.9m.

Cattle

- 17 abattoirs
- 6 abattoirs over the deadweight price reporting threshold of 20,000 head
- 88.3% of kill in six largest abattoirs
- 0.7% of kill in five smallest abattoirs

Sheep

- 14 abattoirs
- 96.2% of kill in five largest abattoirs
- 0.7% of kill in five smallest abattoirs

Pigs

- 8 abattoirs
- 99.4% of kill in four largest abattoirs
- 0.6% of kill in four smallest abattoirs

It is estimated that the share of UK and Common Travel Area nationals in the primary processing labour force dipped slightly below 50% in 2025 from just above half in 2024. Meanwhile, the use of non-UK or European Economic Area (EEA) origin staff to fill gaps declined from its peak, down by around two percentage points from 2024 to an estimated 22% of the workforce in 2025. However, this is still well above estimates of 16% for 2023 and 2% for 2022. EEA-origin staff numbers are estimated to have risen slightly.

The cattle processing sector continues to be more evenly spread in terms of capacity than the sheep or pig sectors, which are dominated by a small number of very large sites.

Distribution of primary red meat sales

Sales distribution of primary red meat processors by destination in 2025						
	Scotland		Rest of UK		Exports	
	Value (£m)	% by value	Value (£m)	% by value	Value (£m)	% by value
Beef	316	31	637	61	84	8
Sheepmeat	31	19	78	46	59	35
Pigmeat	38	60	24	38	1	2
Total red meat	385	30	738	58	144	11
Fifth-quarter	19	24	45	58	13	17
Skins and hides	9	55	2	15	5	30
Total output	413	30	785	58	163	12

Source: QMS Processor survey; QMS calculations and estimates

Note: distribution based on first point of delivery and percentages may not sum to 100% due to rounding

England and Wales are estimated to have remained the most common first point of sale for Scottish processors in 2025, at 58% of revenue, up slightly from the previous year. Export activity grew strongly in value terms, but its share of overall sales dipped slightly; though there was a more significant uplift in exports of fifth-quarter products. Overall exports are estimated to have accounted for 12% of sector turnover while the Scottish market is estimated to have accounted for just under a third of sales.

It should be noted that significant volumes of red meat are delivered to processing and packing sites in England, Wales and Northern Ireland before returning to Scotland in shelf-ready retail packs or being exported from there.

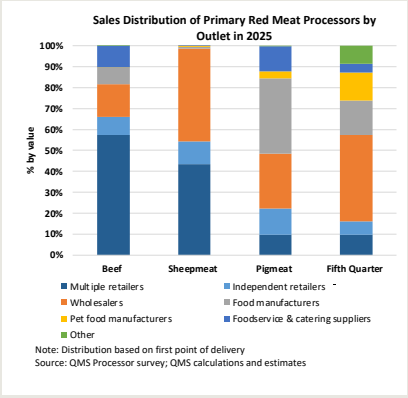
Although the Scottish processing sector is estimated to have continued to direct less of its produce overseas than the UK as a whole, a further jump in lamb exports is estimated to have taken the Scottish lamb export share above the UK average.

In the pork sector, export activity has increased from a low base in 2024 and 2025, with most of this product being shipped to non-EU markets at low price points.

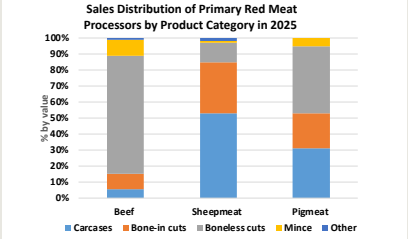
Fifth-quarter products continued to play an important role in helping cattle and sheep processors achieve carcase balance, with prices often looking much more attractive overseas. Fifth-quarter products are much more likely to be shipped to non-EU markets than beef or lamb.

Multiple retailers remained the dominant market outlet for Scotland's beef processors in 2025 but the strength of export activity means that wholesalers account for a similar share of the lamb market as retailers. In the pork sector, sales are estimated to have been spread more evenly across the different types of outlets but with food manufacturing being the most significant.

Product sales mixes continued to vary considerably by species, with boneless cuts the main product for beef processors. Trade in carcases no longer dominates the primary pork sector, with greater processing into retail cuts and pork products now taking place in Scotland.



Note: Distribution based on first point of delivery
Source: QMS Processor survey; QMS calculations and estimates



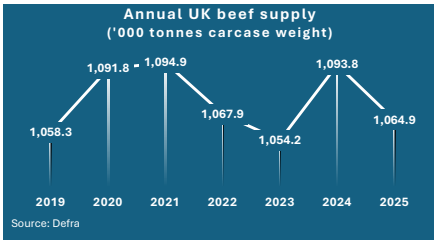
Note: Distribution based on first point of delivery
Source: QMS Processor survey; QMS calculations and estimates

Red Meat Supply And Consumption

Product available for consumption[18]

Beef

Following a 2024 rebound, total UK beef supply declined again in 2025, falling by 2.6%. A 3.4% drop in domestic production and marginal rise in exports outweighed a slight increase in imports.



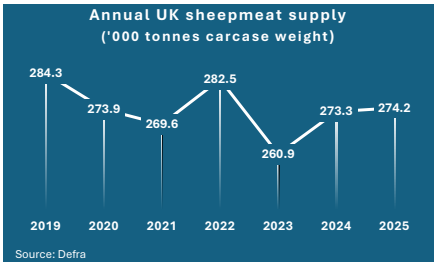
Annual UK beef supply balance sheet in 2025 ('000 tonnes carcase weight)

Sheepmeat

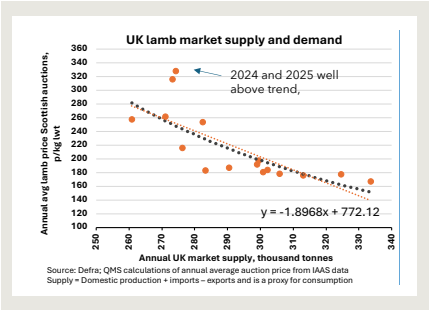
After a jump in sheepmeat supply added to the UK market in 2024, there was a more modest increase of 0.3% in 2025. Growth in domestic production and imports was largely offset by a rise in exports. For a second year, evidence of a strong positive sheepmeat demand shock in the UK came through the pricing channel more so than in higher supplies. Indeed, lamb auction prices were nearly £1/kg liveweight higher in 2025 at Scottish auctions than the historic relationship between lamb prices and total UK market supplies would suggest[19].

18 New supplies made available during the calendar year. This excludes any change in inventories during the year, which would be needed to make a better estimation of annual consumption. Import and export volumes are converted from product weight into carcase weight equivalent.

19 Based on the 2010-2023 period.

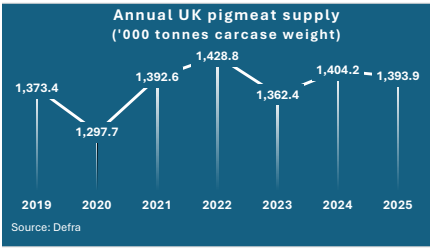


Annual UK sheepmeat supply balance sheet in 2025 ('000 tonnes carcase weight)



Pigmeat

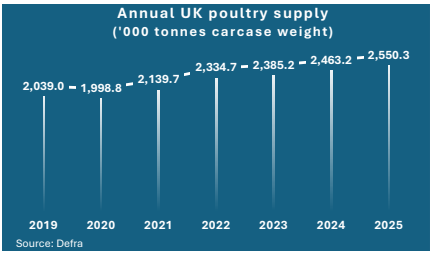
After rebounding strongly in 2024, almost returning to the 2022 peak, pigmeat supply added to the UK market fell back by 0.7% in 2025. Reduced import supply was perhaps surprising given a further increase in the price competitiveness of EU pork in 2025, but it is likely to reflect limited import requirements due to higher domestic output and sluggish demand.



Annual UK pigmeat supply balance sheet in 2025 ('000 tonnes carcase weight)

Poultry

New supply of poultry continued on its long-term upwards trend in 2025. This growth was driven by a strong rise in imports, up 8.6%, alongside a modest increase in domestic production and slight decline in exports, reflecting capacity constraints on further growth in domestic production. This saw poultry maintain its position as the most commonly available meat category for use in retail, catering and further processing in the UK, likely reflecting its increasingly attractive price point. Poultry supply first overtook beef in 1987 and pigmeat in 1991.



Annual UK poultry supply balance sheet in 2025 ('000 tonnes carcase weight)

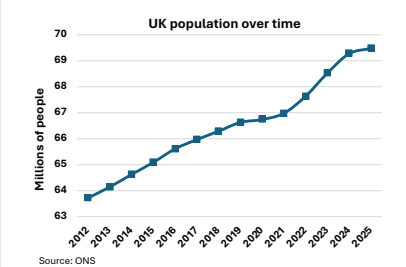
Structural change in UK meat supplies over the past decade (tonnes)

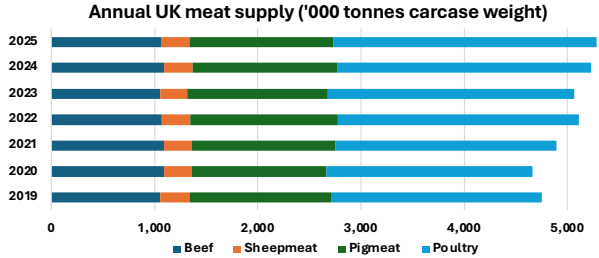
	2013-15 avg annual net supply	2023-25 avg annual net supply	Change over decade	% of total 2013-15	% of total 2023-25
Beef	1.060m	1.071m	+1.1%	23.1%	20.6%
Sheepmeat	0.312m	0.269m	-13.7%	6.8%	5.2%
Pigmeat	1.345m	1.387m	+3.1%	29.3%	26.7%
Poultry	1.877m	2.466m	+31.4%	40.9%	47.5%
Total	4.593m	5.194m	+13.1%	100%	100%

Source: Defra (UK home fed meat production, trade and supplies); QMS calculations

Supply = production + imports - exports

In contrast to the results of Defra's Family Food Survey, which can be highly volatile from year-to-year as it relies on food diary data collected from a small sample of households over a two-week period, Defra's meat balance sheets point to an overall upwards trend in meat demand and consumption over time in the UK. Combined beef, sheepmeat and pigmeat supplies were 0.4% higher in 2023-25 than a decade earlier, with all three species at much higher consumer price levels. A rising UK human population has been supporting overall meat consumption levels.





Source: Defra: HMRC: OMS calculations

Per capita supplies

After three years of growing at an annual rate of at least 1%, UK population growth slowed to only 0.3% in 2025 according to the ONS. This reflects a sharp reduction in net migration after a period of post-covid, post-EU exit strength. Nevertheless, continued population growth means that an increased meat supply would have been required to maintain per capita supply at 2024 levels.

Scottish per capita supply can be estimated from population statistics, differences in sale levels reported by Kantar between Scotland and GB as a whole, and from differences in consumption levels reported in Defra's Family Food datasets for the nations and regions of the UK. It should be noted that these estimates are based on consumption at home and it can be hard to separate processed product categories into the different component meats. It should also be noted that survey results can be volatile and based on small sample sizes. Per capita consumption is estimated to have risen for lamb and poultry but fallen for beef and pork in 2025.

The evidence continues to indicate above-UK average beef consumption in Scotland but below-average pigmeat consumption and much lower levels of sheepmeat consumption. Within the pigmeat category, Scotland is below the UK average for pork but above for processed products. Poultry consumption is also estimated to be well below average.

Per capita supplies in UK 2025 76.0kg per person
(+0.6% y/y)

Per capita supplies in Scotland 2025 69.2kg per person
(-2.3% y/y)

 **Beef 15.3kg** (-2.9% y/y)	 **Beef 17.3kg** (-5.2% y/y)
 **Sheepmeat 3.9kg** (+0.0% y/y)	 **Sheepmeat 2.3kg** (+6.8% y/y)
 **Pigmeat 20.1kg** (-1.0% y/y)	 **Pigmeat 17.1kg** (-5.7% y/y)
 **Poultry 36.7kg** (+3.2% y/y)	 **Poultry 32.6kg** (+0.7% y/y)

Source: Defra, Worldpanel by Numerator, ONS; Scottish Government; QMS calculations and estimates

Note: excludes adjustment for opening and closing inventory

Source: Defra, Worldpanel by Numerator, ONS; Scottish Government; QMS calculations and estimates

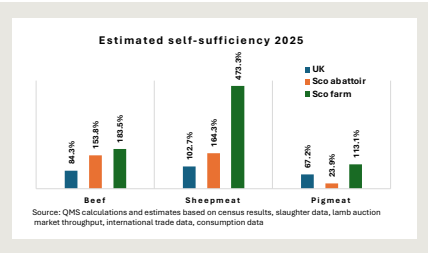
Note: excludes adjustment for opening and closing inventory

Self-sufficiency

Scotland's abattoir production of beef and sheepmeat far out-strips estimated total consumption levels. This contrasts with the UK as a whole, which is a net importer of beef while generally being a marginal net exporter of sheepmeat. In the pigmeat sector, while Scotland and the UK are both net importers, the gap is much larger in Scotland, with abattoir output less than a quarter of estimated demand, compared to being two-thirds of demand at UK level.

However, self-sufficiency based on farm production levels[20] would be higher for beef and surge for sheepmeat, and would rise above 100% for pigmeat, reflecting the significant volume of cross-border movement of live animals for finishing and for slaughter.

Basic estimates of self-sufficiency do not however take into consideration the demand for and supply of different cuts of meat or processed meat products, or the location of specialist further processing and packing sites, which can reflect workforce availability.



Source: QMS calculations and estimates based on census results, slaughter data, lamb auction market throughput, international trade data, consumption data

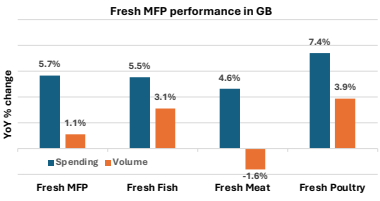
Retail sales

Shoppers' spending on Fresh Meat, Fish and Poultry (MFP) increased by a faster rate of 5.7% in 2025, with all categories seeing growth, according to data from Worldpanel by Numerator[21]. However, fresh meat was the only category to record a decline in volume sales in Great Britain, down by 1.6%. This decline was largely driven by price inflation, particularly within beef, reflecting ongoing supply chain challenges. Despite this, value-added fresh meat saw volume growth, as did fresh fish and poultry. This was primarily driven by rising demand for convenience and a continued shift towards 'dine-in over dine-out' behaviour.

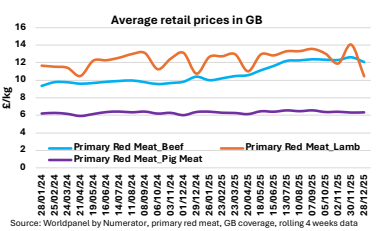
Inflation levels rose significantly in 2025, mainly driven by surging beef prices. The average price of primary red meat in Scotland increased by 12.6%, contributing to an 8.6% increase in spending in primary red meat, according to Worldpanel by Numerator[22]. However, this uptick in spending was accompanied by a 3.5% decline in volume, reflecting shoppers' cautious purchasing behaviour. Notably, the volume reduction was primarily driven by fewer shopping trips as a result of price inflation.

Cattle farmgate prices surged in early 2025 due to strong domestic and export demand at the start of the year. In May 2025, average prime cattle prices peaked at around 46% higher than in 2024[23], with price inflation gradually passed through the supply chain to the retail end. This pushed up the beef retail price significantly to a historical high of £12.58/kg in November[24]. Inflation levels had already surpassed those seen during the 2023 cost of living crisis.

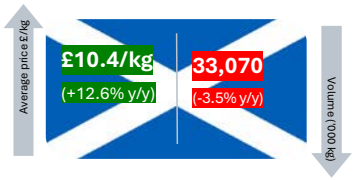
20 Farm production estimates are based on the number of cattle, sheep and pigs born on Scottish farms.
21 Worldpanel by Numerator, 52 weeks ending 28 December 2025. Fresh meat covers added-value, processed and unprocessed red meat.
22 Worldpanel by Numerator, unprocessed red meat, 52 weeks ending 28 December 2025 compared with 52 weeks ending 29 December 2024.
23 AHDB; QMS calculations.
24 Worldpanel by Numerator, primary beef, Scotland, 12 weeks ending 2 November 2025.



Source: Worldpanel by Numerator, 52 w/e 28th Dec 2025; QMS calculations



Source: Worldpanel by Numerator, primary red meat, GB coverage, rolling 4 weeks data

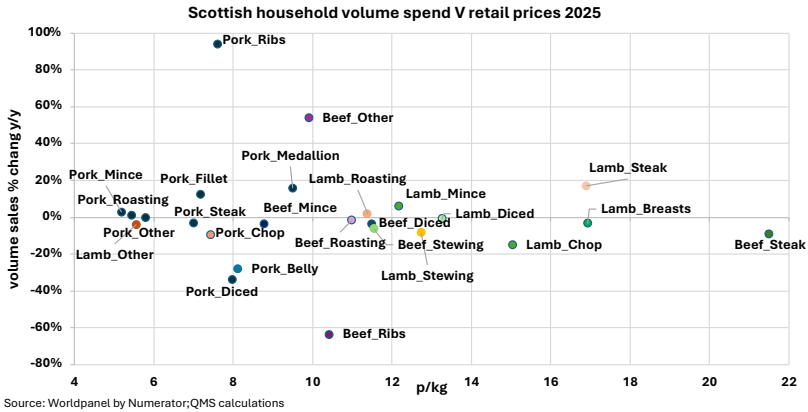


Estimates of unprocessed red meat sales in Scotland 2025 – based on Worldpanel by Numerator

Despite this, beef remained central to Scottish households' purchasing behaviour, accounting for 65% of total red meat volume consumed in 2025.

Health became a central priority for consumers in 2025, alongside an ongoing focus on value. Demand for high-protein foods and the avoidance of ultra-processed foods had a significant impact on consumption behaviour. As a result, consumers' growing preference for natural sources of protein drove primary meat consumption upwards, while sales of meat-free protein alternatives came under pressure.

Beef steak remained the most expensive cut within primary red meat, prompting volume switching to other cuts, such as lamb steak, which was £4.60/kg cheaper. Despite this, beef steak continued to be the second most purchased primary red meat cut in Scotland, behind only beef mince. Lamb outperformed both beef and pork in 2025, recording a slight increase in volume, driven by lamb steak, mince and roastings. Premium pork cuts, such as pork medallions and pork fillet, also saw strong volume growth of 16% and 12% respectively, indicating potential future growth.



Source: Worldpanel by Numerator;QMS calculations
52w y/y comparison for week ending 28th December 2025 ; low sample sizes for beef other, beef ribs, lamb breast, lamb stewing, pork dice and pork ribs; 'beef other' includes offal and mixed pack; 'lamb other' includes offal, mixed pack and lamb halves; 'pork other' includes offal, mixed pack and stir fry

Red meat retail performance in Scotland 2025[25]

BEEF

- +10.8% in total spend
- Average price per kilo increased by 16.2% to £11.69/kg
- Volume fell by 4.6%, mainly driven by fewer shopping trips but partially offset by higher penetration
- Proportion of Scottish households shopped beef remained higher than in GB, at 84.3%

LAMB

- +6.9% in total spend
- Average price per kilo increased by 6.8% to £12.52/kg
- Volume increased by 0.1%, driven by a bigger basket size and higher penetration, at 33.4%, despite fewer trips

PORK

- +1.8% in total spend
- Average price per kilo increased by 2.6% to £6.57/kg
- Volume fell slightly by 0.8%, driven by a smaller basket size and lower penetration, despite more trips
- Proportion of Scottish households shopped pork fell to 57.1%

BACON AND SAUSAGE

- Spending on bacon declined by 2.6%, while pork sausages saw a spending growth of 2.6%
- Average prices fell slightly to £7.29/kg for bacon and £5.72/kg for pork sausages
- Bacon volume declined by 1.1%, whereas pork sausage volume increased by 4%, supported by rising penetration (83.2%), despite fewer households buying bacon (84.2%)

25 Worldpanel by Numerator, primary red meat, Scotland total coverage, 52weeks ending 28 December 2025.

Retail Prices

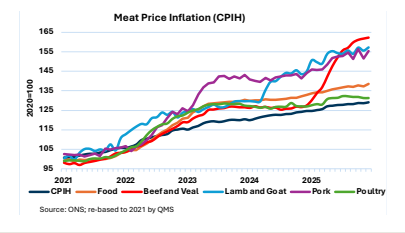
Consumer Prices Index (CPIH[26])

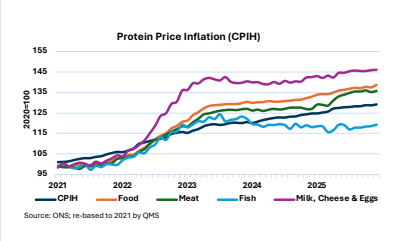
Following a surge in 2022 and the first half of 2023, consumer price inflation slowed through late 2023 and 2024. However, inflation edged higher again in 2025 and averaged almost 4% over the year, holding well above the Bank of England's 2% target, limiting room for interest rate reductions[27].

Goods price inflation remained moderate in 2025, with prices averaging 2% higher than in 2024 as commodity markets remained more balanced for a second year following the volatility of 2022 and 2023. However, the service sector continued to experience significant pricing pressures, averaging 5% higher than in 2024, reflecting higher labour costs and wage growth, which pushed up business costs but also consumer spending.

After a year of relatively modest growth in 2024, consumer price inflation for meat strengthened in 2025, reflecting renewed upwards pressure on farmgate prices. Beef retail prices rose particularly sharply, driven by record high cattle prices, while lamb prices continued to increase strongly, supported by firm demand. However, pork prices also recorded firmer growth, despite falling farmgate prices, contributing to a broader increase in meat price inflation across the year.

Costs of ready meals and pricing in the foodservice sector tend to reflect wider economic factors including labour costs and consumer demand, more closely than the often volatile prices of their raw materials. As a result, inflation continued to outpace or match the overall level of food price inflation in 2025.





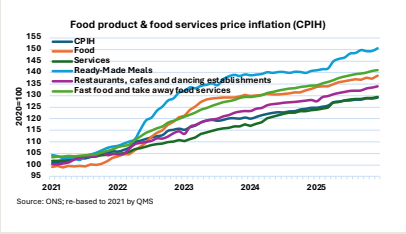
26 CPIH is a measure of consumer price inflation which includes owner occupiers' housing costs.

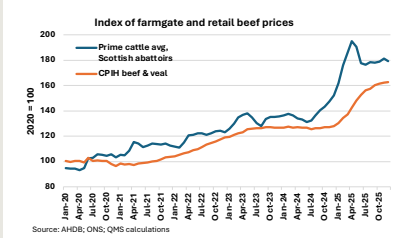
27 Please note that the Bank of England inflation target is based on CPI rather than CPIH, which is quoted here and can vary from the CPI. The annual CPIH increase was 3.9% in 2024 while the CPI increased by 3.4%, the second consecutive year where the CPIH outpaced the CPI. However, the CPI rose faster than the CPIH in 2021, 2022 and 2023.

Consumer price index and annual inflation rate for selected categories (CPIH)

	Change from previous year (%)					Annual average index (2015 = 100)			
	2021	2022	2023	2024	2025	2022	2023	2024	2025
All prices	+2.5	+7.9	+6.8	+3.3	+3.9	120.5	128.6	132.9	138.0
All goods	+2.8	+12.1	+7.6	-0.2	+2.0	121.4	130.6	130.4	133.0
All services	+2.2	+4.6	+6.0	+5.8	+5.1	119.2	126.4	133.7	140.6
Food	+0.3	+11.1	+14.7	+2.6	+4.0	115.5	132.5	135.9	141.3
Meat	-0.5	+11.1	+12.8	+1.9	+4.9	110.6	124.8	127.1	133.3
Beef and veal	-0.3	+11.4	+12.4	+1.5	+18.7	106.4	119.5	121.4	144.1
Lamb and goat	+4.1	+14.9	+6.0	+9.4	+10.7	131.6	139.4	152.5	168.8
Pork	+1.6	+10.9	+20.3	+2.9	+6.5	111.9	134.6	138.5	147.6
Poultry	+0.3	+14.0	+11.4	-0.2	+2.9	102.3	113.9	113.7	117.0
Edible offal	+3.2	+16.9	+18.9	+10.3	+10.6	123.3	146.7	161.8	178.9
Dried, salted or smoked meat	-1.5	+8.1	+12.8	+0.5	-0.3	108.5	122.5	123.1	122.7
Fish	-2.2	+10.5	+11.0	-2.2	-0.7	122.7	136.2	133.2	132.3
Milk, cheese and eggs	+0.9	+17.2	+18.8	0.0	+3.0	119.1	141.5	141.5	145.7
Ready-made meals	+3.0	+14.1	+13.9	+3.0	+4.7	125.6	143.0	147.3	154.2
Restaurants, cafes and dancing establishments	+3.0	+6.9	+8.9	+5.5	+4.0	123.0	133.9	141.3	147.0
Fast food and take away food services	+2.6	+9.0	+10.2	+5.2	+4.6	131.5	145.0	152.5	159.5

Source: ONS





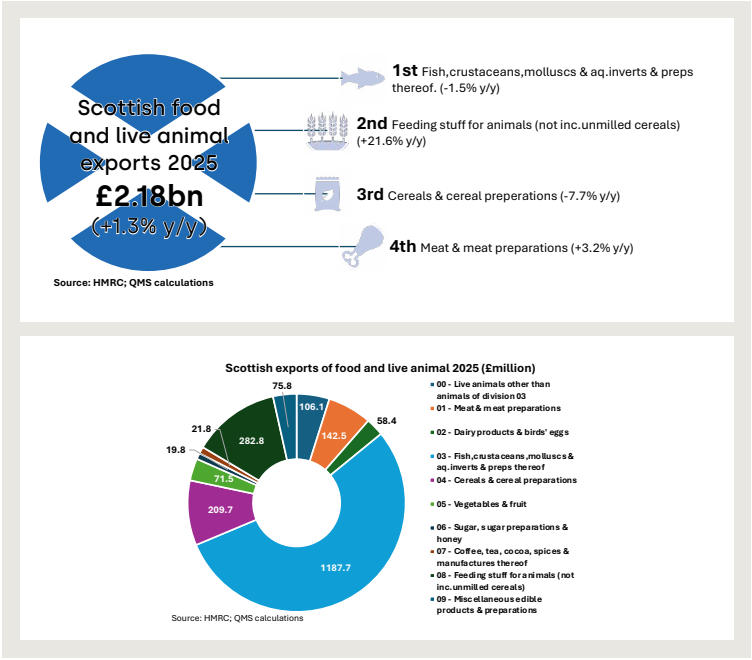
International Trade

Scottish trade

HM Revenue and Customs publishes estimates of the level of exports from each of the devolved nations and English regions on a quarterly basis[28]. These trade figures are reported by Standard International Trade Classification (SITC) Division, rather than the more detailed Harmonised System (HS).

Scottish food and live animal exports 2025

Scottish exports of food and live animals reached £2.18bn in 2025, marking a 1.3% increase from the previous year. Fish and seafood remained the primary export category, though its share out of the total Scottish exports of food and live animals declined to 54.6% in 2025. Remaining the fourth-largest category, meat and meat preparations saw an increase in share, edging up to 6.5%.

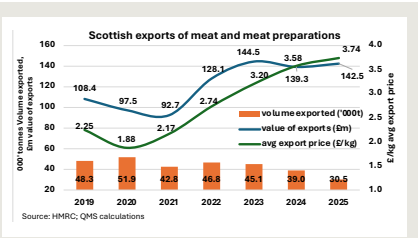


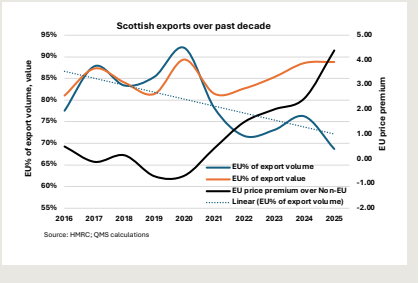
28 When a company is based in more than one UK region, its exports are allocated regionally by the number of employees based there. As a result, the data needs to be treated with caution. These trade figures are reported by Standard International Trade Classification (SITC) Division, rather than the more detailed Harmonised System (HS), meaning that the most detailed level of breakdown for meat is 'meat and meat preparations', which will include prime cuts as well as offal, cured products, and cooked meat and offal products. Available at: https://www.uktradeinfo.com/trade-data/rts-custom-table/

Scottish exports of meat and meat preparations 2025

Scottish exports of meat and meat preparations rebounded in 2025, edging up by 3.2% year-on-year and reaching £142.5m. However, export volumes continued to slide for a third year in a row, falling by a significant 22% year-on-year, amounting to 30,458 tonnes, reaching a new low. The average export price rose for the fifth consecutive year, up by 32% or £1.14, reaching £4.68/kg.

Preference of Scottish meat exports to the European Union (EU) softened in 2025, with the EU accounting for 69% of the export volume, reflecting a longer-term shift in volume from the EU to non-EU markets. The EU continued to dominate in value terms, contributing 89% of total export value. Notably, the average price premium for EU over non-EU exports broadened to nearly £4.4/kg. This suggests a strategic focus on premium markets within the EU, while rebalancing towards lower-priced products in non-EU markets.





UK overseas trade

At UK level, detailed import and export statistics estimates under the HS system are published by HM Revenue and Customs, providing a view of the trade environment in which Scottish producers and processors operate[29].

In 2025, UK exports of meat and edible meat offal continued to rise by 12.3% in value and 1.6% in volume, with a 10.5% increase in the average export price. Export value reached a ten-year high, at 52% above 2016 levels, while volume remained behind 2022 levels and 33% below the ten-year peak in 2020.

UK trade of meat and edible meat offal 2025

Exports (value)	Imports (value)
£2.14bn	£5.93bn
+12.3% y/y	+14.3% y/y
Exports (volume)	**Imports (volume)**
0.75mn tonnes	1.49mn tonnes
+1.6% y/y	+2.1% y/y

Source: HMRC; QMS calculations

UK imports of meat and edible meat offal continued to increase in 2025, lifting by 14.3% in value and 2.1% in volume. Import value reached a ten-year high, while volumes climbed to a six-year high.

The widening gap between imports and exports over the past five consecutive years continues to indicate growing demand for meat products in the UK while signalling capacity constraints in domestic production and processing.

29 https://www.uktradeinfo.com/trade-data/ots-custom-table/

Beef

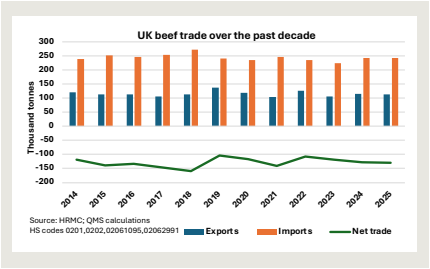
Over the last decade, the UK has been a net importer of beef to meet domestic demand. The gap between imports and exports widened slightly in 2025, reaching 129,400t. Beef exports dipped slightly in 2025 but remained higher than in 2023, though they trailed 1.7% behind the ten-year average. Beef imports edged up to a four-year high but were still 0.8% below ten-year average.

Major trading countries 2025

The EU remains the UK's primary trading partner in beef, representing 79.1% of import volume and 87.5% of export volume in 2025. There was a notable shift in import sources in 2025, with greater diversification towards regions outside the EU, while dependence on the EU for exports increased in 2025.

Ireland stood out as the UK's leading beef trading country for both imports and exports, particularly dominating imports with a 67.1% share in 2025. The average export price to Ireland surged by 37% to £6.1/kg, while the average import price from Ireland rose by 33% to £7.56/kg, trading 20p above the total average import prices. The primary traded beef products were fresh or chilled bovine boneless meat[30], followed by frozen boneless meat[31].

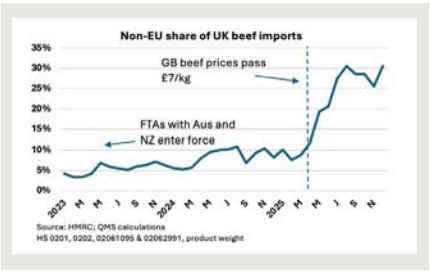
Notably, beef imports from Australia and New Zealand continued to grow in 2025, increasing by 172% and 298% respectively. Imports of frozen boneless meat from Australia to the UK were nearly 12 times higher than the previous year, while imports from New Zealand increased sixfold. Average import prices declined slightly in 2025 for both sourcing countries. Imports from South America also rose, particularly from Brazil and Uruguay, increasing by 134% and 67% respectively.



EU – main beef trading partner with UK 2025

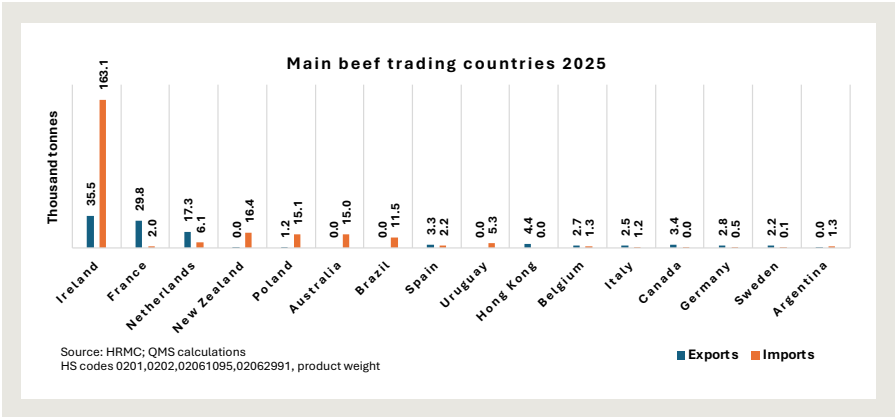
79.1% of UK imports

87.5% of UK exports



30 HS 02013000 Fresh or chilled bovine meat, boneless.

31 HS 02023090 Frozen bovine boneless meat (excluding forequarters, whole or cut into a maximum of five pieces, each quarter being in a single block 'compensated' quarters in two blocks, one of which contains the forequarter, whole or cut into a maximum of five pieces, and the other, the hindquarter, excluding the tenderloin, in one piece, crop, chuck and blade and brisket cuts).

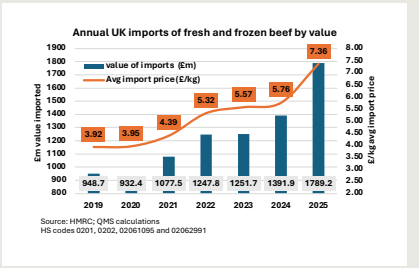


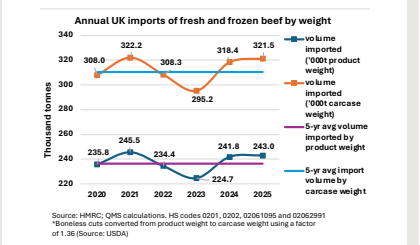
%	Ireland	France	Netherlands	NZ	Poland	Australia	Brazil	Spain	Uruguay	Hong Kong	Italy	Canada	Germany	Sweden	Argentina
Exports shares	31.2	26.3	15.2	0.0	1.1	0.0	0.0	2.9	0.0	3.9	2.2	3.0	2.5	1.9	0.0
Imports shares	67.1	0.8	2.5	6.7	6.2	6.2	4.7	0.9	2.2	0.0	0.5	0.0	0.2	0.0	0.5

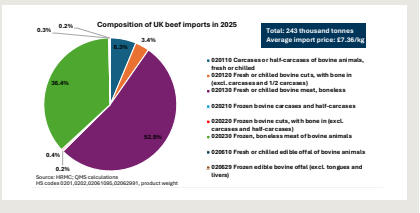
Imports

In 2025, the value of beef imports increased for the fifth consecutive year and lifted significantly by 28.4% to nearly £1.8bn. This was primarily driven by a strong increase in average import prices (+28%), while the volume edged 0.5% higher. Import volumes were 2.8% above the five-year average. Import price inflation was driven by EU products, which averaged 33% dearer than in 2024, whereas non-EU beef averaged 5% cheaper. As a result, non-EU beef went from averaging £1.72/kg higher than EU beef in 2024 to 53p/kg cheaper in 2025.

Boneless meat remained the primary trading category, accounting for 89% of the imported beef in 2025, comprising 53% fresh and 36% frozen. Notably, frozen boneless volumes rose by a significant 13.5% in 2025, largely driven by a surge in imports from Oceanic region, whereas less arrived from the EU.



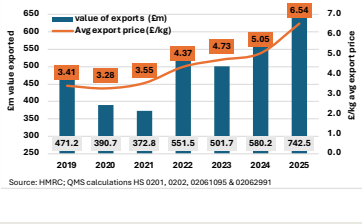


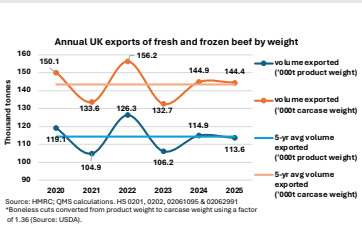


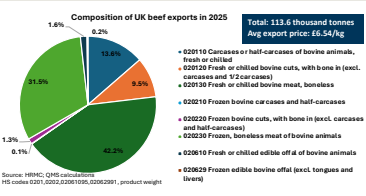
Exports

The value of UK beef exports grew for the second consecutive year, surging by 28% in 2025 and reaching a record high of £742.5m. This growth was driven by average export price inflation, which was offset by a decline in export volume. A total of 113,600t of beef were exported in 2025, representing a 1.1% decrease compared to the previous year, and 0.6% below the five-year average.

Boneless meat remained the primary export category, accounting for 74% of total beef exports in 2025.

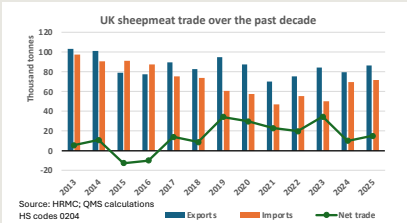






Sheepmeat

The UK has continuously been a net exporter of sheepmeat[32] since 2017. The net trade surplus widened to 15,000t in 2025, primarily driven by strong growth of sheepmeat exports, which rose by 9% year-on-year. While sheepmeat exports still trailed 3% behind the ten-year average, import levels in 2025 were 7% higher than the ten-year average.

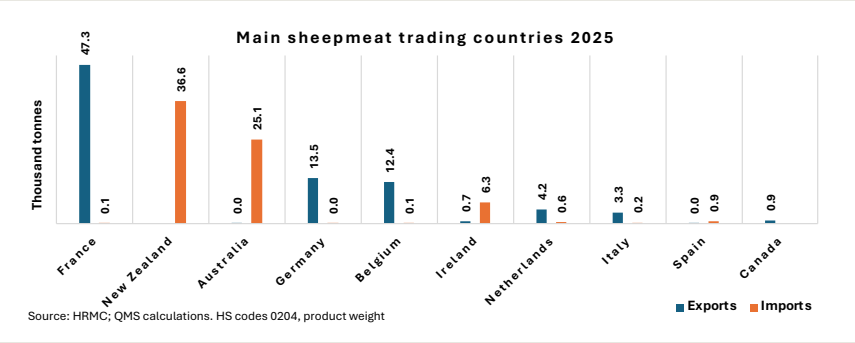


Major trading countries 2025

In 2025, the EU remained the primary destination for UK sheepmeat exports, comprising 95.1% of the total volume, while the Oceanic region strengthened its position as the main supplier of sheepmeat to the UK, contributing 86.1% of total imports.

France reinforced its position as the top destination for UK sheepmeat, raising its share to 54.6% of the total export volume. Meanwhile, New Zealand continued as a key supplier of sheepmeat to the UK, however, the volume softened by 4,200t in 2025. In contrast, Australia notably increased its supply to the UK, with volumes rising by 7,300t and 41%.

32 HS code 0204 also includes goat meat but trade is minimal.



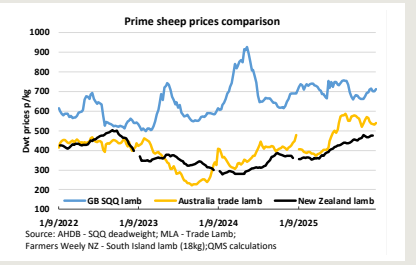
Source: HRMC; QMS calculations. HS codes 0204, product weight

%	France	New Zealand	Australia	Germany	Belgium	Ireland	Netherlands	Italy	Spain	Canada
Exports share	54.6	0.0	0.0	15.6	14.3	0.8	4.9	3.8	0.0	1.0
Imports share	0.1	51.1	35.1	0.0	0.1	8.8	0.8	0.3	1.3	0.0

Despite elevated lamb prices in the Oceania region, prime sheep prices in Great Britain remained significantly higher than those in Australia and New Zealand throughout 2025, up by nearly 47% and 73% on average, respectively. Despite significant import price inflation from these two countries (20.6% and 33.3% respectively), the price gap continued to fuel demand for cheaper imported alternatives.

95.1%
(+0.3pp y/y)

Of the UK's sheepmeat exports went to the EU in 2025 – product weight

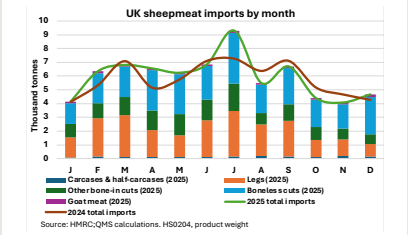


Source: AHDB - SQQ deadweight; MLA - Trade Lamb; Farmers Weely NZ - South Island lamb (18kg);QMS calculations

Imports

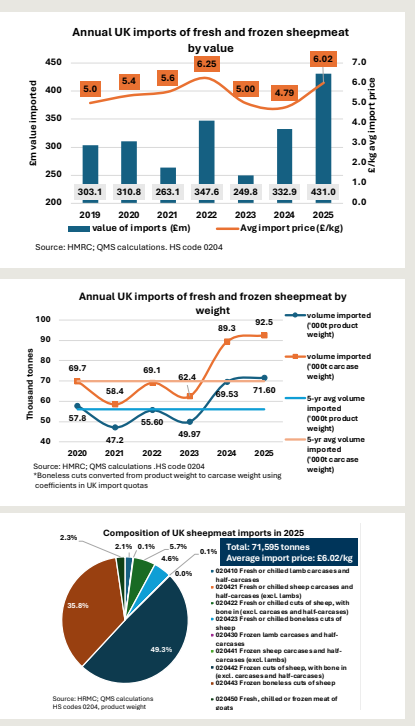
In 2025, UK sheepmeat imports saw a strong growth in value, surging by 29.4%, taking it well above the five-year average. The increase was mainly driven by import price inflation, with volumes up only 3% after jumping higher in 2024.

Frozen bone-in cuts (excl. carcases and half-carcases), mainly sheep legs, remained the primary trading category, accounting for 49.3% of total sheepmeat imports and increasing by 2,200t compared to last year. Imports of frozen boneless cuts also rose significantly, up by 3,000t in 2025.



Source: HMRC;QMS calculations. HS0204, product weight

In 2025, the volume of sheepmeat imports followed a broadly similar distribution throughout the year to that of the previous year, despite a notable uplift in July. There was a marked volume uplift in lamb leg imports ahead of the traditional Easter holiday and, perhaps more surprisingly, again in July. It is also worth noting a notable shift in volumes from legs to boneless cuts in December 2025.

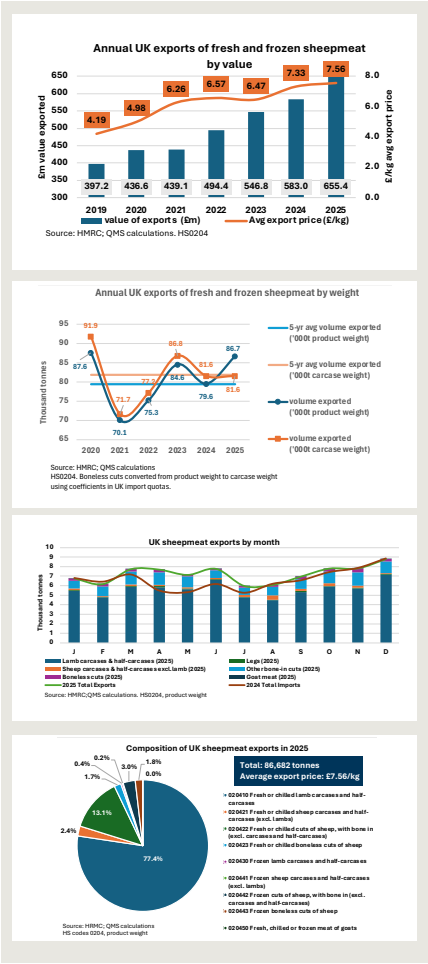


Exports

In 2025, the value of UK sheepmeat exports rose further, with a 12.4% increase taking them to a new record high of £655.4m. This uplift was primarily driven by volumes, up 9%, added to by a 3.2% rise in average price.

Fresh lamb carcases[33] remained the primary category for sheepmeat exports, despite the volume share decreasing slightly to 77.4%.

In the second quarter of 2025, UK sheepmeat exports saw a notable volume uplift, in response to a growing demand from the EU but also supported by a late arrival of hoggs onto the market. Export volumes built up towards the end of 2025, following the pattern observed in previous years.

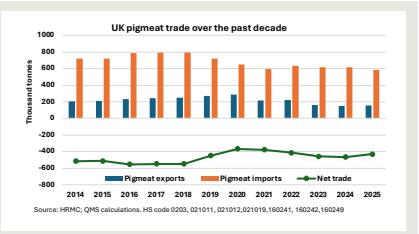


33 HS020410 Fresh or chilled lamb carcases and half-carcases.

Pigmeat

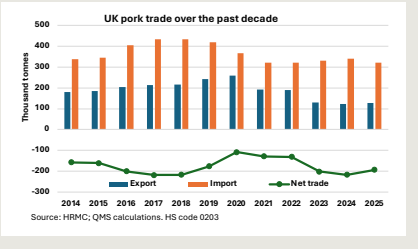
Over the past decade, the UK has consistently been a net importer of pigmeat[34], including pork, bacon and ham, and prepared or preserved pigmeat. Historically, pigmeat imports have been approximately three times greater than exports. In 2025, this gap narrowed year on year, primarily due to a decline in imports, combined with an increase in exports throughout the year.

Given that over 80% of pigmeat exports and more than half of pigmeat imports have historically consisted of chilled or frozen pork, pork represents the primary trading category. Pork imports declined in 2025 after three consecutive increases, while pork exports rebounded after slumping to a fifteen-year low in 2024.



UK pigmeat
imports from the EU

99.8%
(product weight)

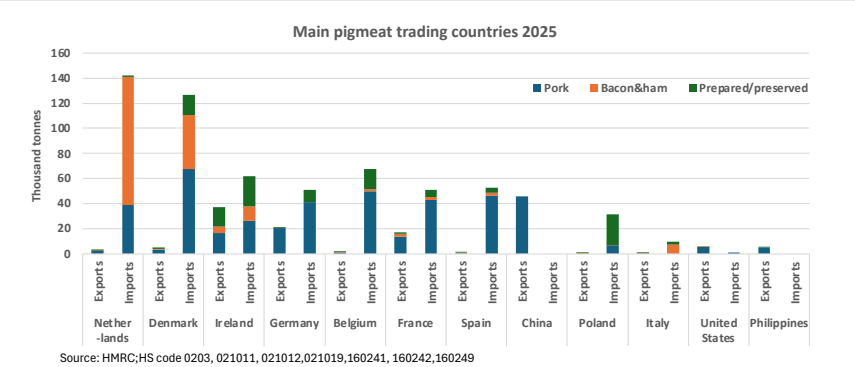


34 Pigmeat imports are defined here as including fresh and frozen pork (HS 0203), bacon and ham (HS 0210), and prepared or preserved pigmeat (HS 1602). In HS 0203, bone-in cuts converted from product weight to carcase weight using a factor of 1.11 and boneless cuts converted at 1.30. In HS 0210, bone-in hams and shoulders are converted at 1.30 and other products at 1.16. In HS 1602, conversion rates are 1.30. (Source: USDA – Livestock and Poultry World Markets and Trade).

Major trading countries 2025

In 2025, 99.8% of pigmeat imports to the UK came from the EU. The Netherlands, as the top supplier, accounted for 24.3% of the UK's pigmeat imports, with 72% being bacon and ham.

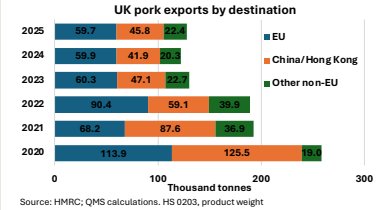
As for exports, 55.7% of UK pigmeat went to the EU, while 44.3% was shipped to other regions. China remained the top destination for UK pigmeat exports, accounting for 29.3% of the total export volume, predominantly pork. Ireland was the second-largest destination for UK pigmeat, representing 23.9% of total exports, with nearly 44% being pork.



Source: HMRC;HS code 0203, 021011, 021012,021019,160241, 160242,160249

%	Netherlands	Denmark	Ireland	Germany	France	Belgium	China	Spain	Poland	Italy	United States	Philippines
Exports share	1.9	2.7	23.9	13.3	10.8	0.9	29.3	0.7	0.4	0.3	3.7	3.3
Imports share	24.3	20.7	10.5	8.7	8.7	9.9	0.0	9.0	5.4	1.6	0.2	0.0

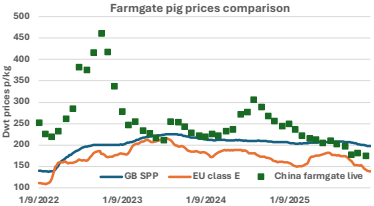
Pork exports to the EU declined slightly, while exports to China/Hong Kong and other non-EU regions rebounded in 2025. China/Hong Kong's share rebounded from the previous year as well, rising to 36%. Nearly 91% of China's imports from the UK were frozen pork boneless[35] cuts, with volumes increasing significantly from the previous year.



Source: HMRC; QMS calculations. HS 0203, product weight

35 HS 020329 Frozen meat of swine (excl. carcases and half-carcases, and hams, shoulders and cuts thereof, with bone in).

In 2025, farmgate pig prices in China continued the downward trend seen since mid-2024, trading below the GB SPP in the fourth quarter and thereby squeezing export opportunities for UK producers. EU grade E pig prices have generally been lower than the GB SPP, as well as farmgate pig prices in China, giving EU producers a comparative advantage in supplying pork to the Chinese market; though this has been partially offset by extra tariffs placed on EU pork in the second half of 2025.

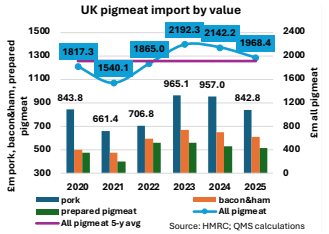


Source: AHDB - GB SPP prices; European Commission - EU pork prices coverted by EUR/GBP monthly exchange rate; Ministry of Agriculture and Rural Affairs of the People's Republic of China - farmgate live monthly average (deadweight prices were converted from farmgate live pig prices with 0.73 kill out rate)

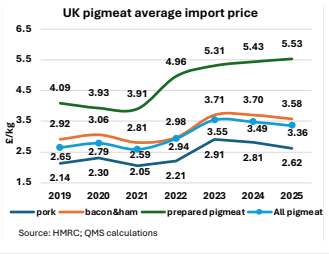
Imports

The UK's pigmeat imports continued to fall in 2025, despite highly competitive EU pig and pork prices, decreasing by 8.1% in value and 4.8% in volume, with all three categories contributing to the fall. Pork imports drove the overall reduction in volume, down by 19,000t. Average import prices for pork and for bacon and ham declined, whereas those for prepared pigmeat increased.

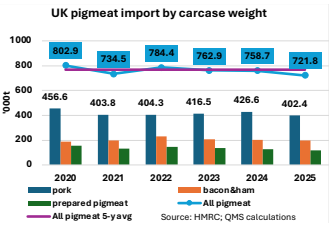
In 2025, pork, the leading trade category, accounted for 55.8% of the UK's pigmeat imports in carcase weight. Bacon and ham edged up to 27.5%, while prepared or preserved pigmeat remained at 16.8%. Fresh boneless[36] remained the top imported category, though its share dipped slightly to 34.4% while holding above its five-year average level.



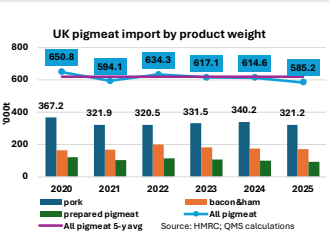
Source: HMRC; QMS calculations



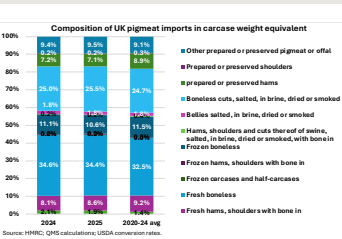
Source: HMRC; QMS calculations



Source: HMRC; QMS calculations



Source: HMRC; QMS calculations



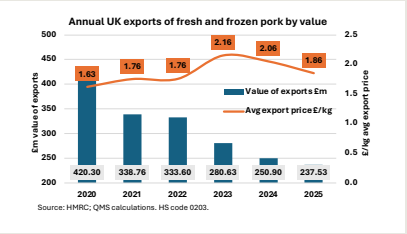
Source: HMRC; QMS calculations; USDA conversion rates.

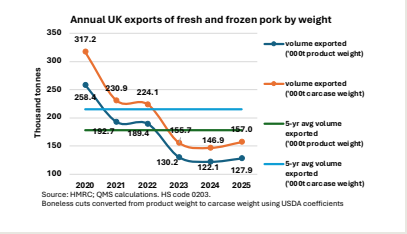
36 HS 020319 Fresh or chilled meat of swine (excluding carcases and half-carcases, and hams, shoulders and cuts thereof, with bone in).

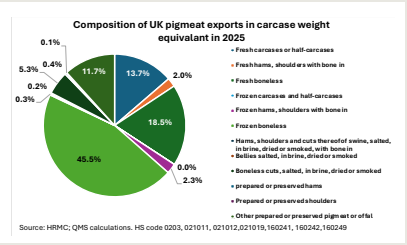
Exports

Pork's share of the UK's exports rebounded to 82.3% in product weight, with prepared or preserved pigmeat declining slightly to 11.6% and bacon and ham making up just 6.1%.

The UK's pork exports continued to decline in value for the fifth consecutive year in 2025, with a drop of 5.3%, and moving 43.5% below 2020 levels. However, pork exports in product weight rebounded from the five-year low recorded in 2024, increasing by 4.8%, though still 50.5% below 2020 levels. Reflecting domestic and overseas market conditions, the average export price fell as well, down by 9.6% to £1.86/kg.







UK pigmeat exports 2025

155,400 TONNES

(+3.5% y/y)

Pork
(127,947t; +4.7% y/y)

Bacon and Ham
(9,475t; -7.8% y/y)

Prepared/preserved pork
(17,979t; +1.1% y/y)

Exchange rate movements

Shifts in exchange rates affect the competitiveness of Scotland's red meat at home and abroad. A stronger sterling tends to hinder exports because it reduces the sterling revenue from an unchanged euro price. At the same time, it reduces the relative price of imports, potentially reducing demand for domestic product in price sensitive market segments – most likely in foodservice and food manufacturing.

Sterling started 2025 in a stronger position against the euro but gradually weakened throughout the year. This depreciation was mainly due to the UK's weak growth outlook and expectations of earlier interest rate cuts reducing investor demand for the pound relative to the euro.

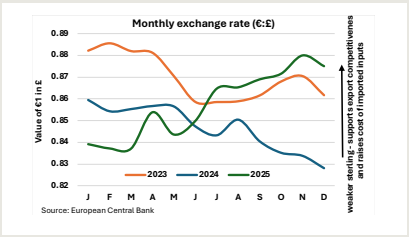
Impact of exchange rate movements on import and export competitiveness

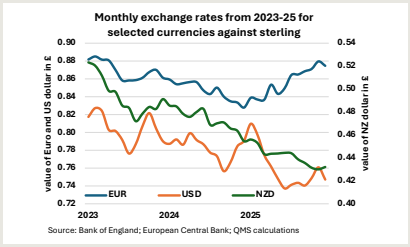
	Annual average exchange rate (value of €1 in £)		Return in £/kg to a UK exporter from an export price of €5/kg	EU export price needed to hold UK import price at £5/kg
2016	^	81.9	4.1	6.1
2017	^	87.7	4.4	5.7
2018	^	88.5	4.4	5.7
2019	v	87.8	4.4	5.7
2020	^	89.0	4.5	5.6
2021	v	86.0	4.3	5.8
2022	v	85.3	4.3	5.9
2023	^	87.0	4.3	5.8
2024	v	84.7	4.2	5.9
2025	^	85.7	4.3	5.8

Source: ECB; QMS calculations

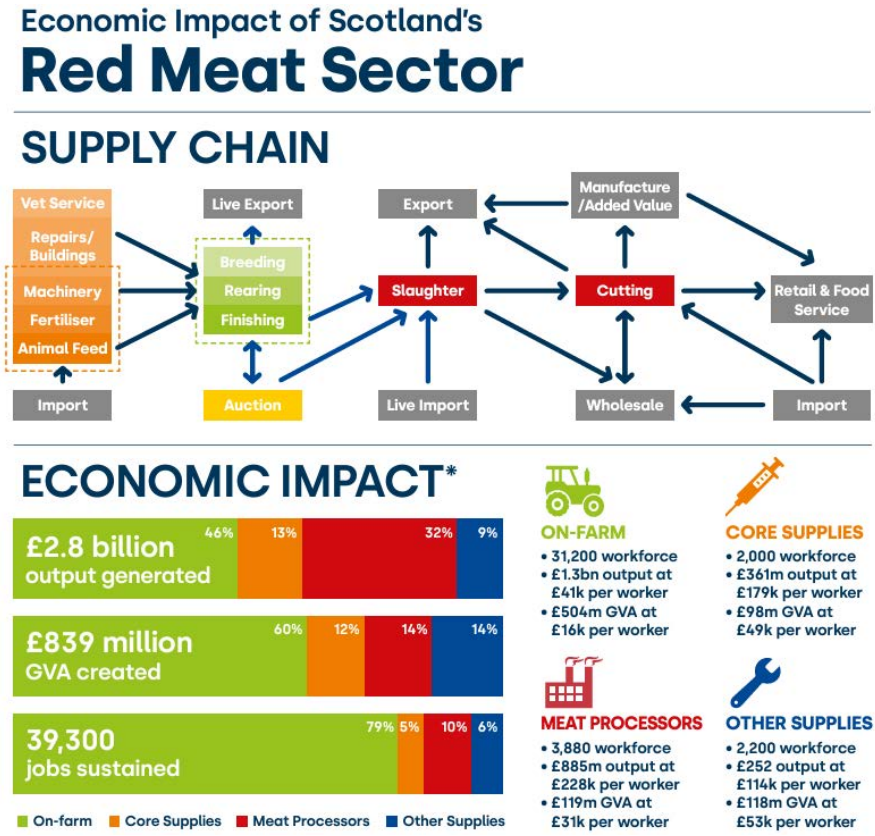
With the US dollar commonly used in international trade, its position against sterling can have significant influence on the competitiveness of UK red meat exports to markets outside the EU. A weaker US dollar in 2025 compared to a year earlier had mixed effects on the Scottish red meat sector, placing downward pressure on commodity prices and input costs, but also reducing the sterling value of dollar-denominated export revenues.

Sterling became stronger against the New Zealand dollar in 2025, supporting the competitiveness of beef and lamb imports from the country.





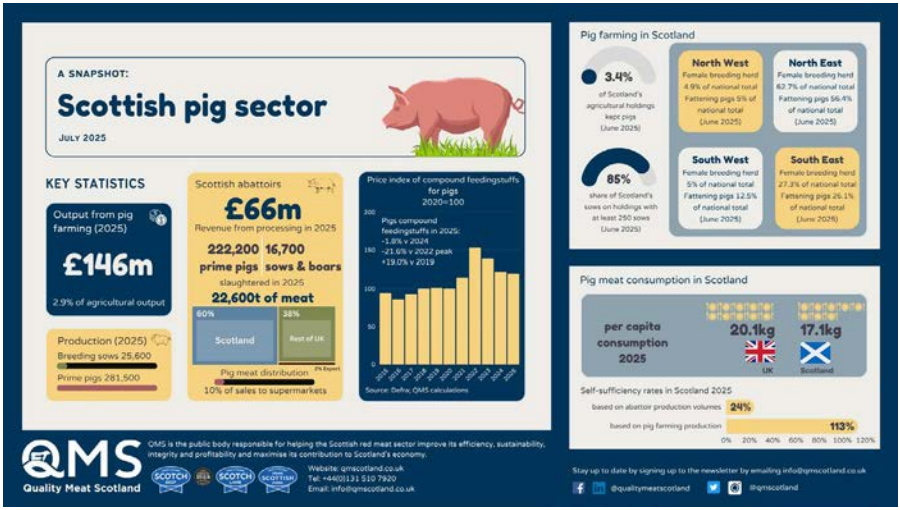
Useful Resources

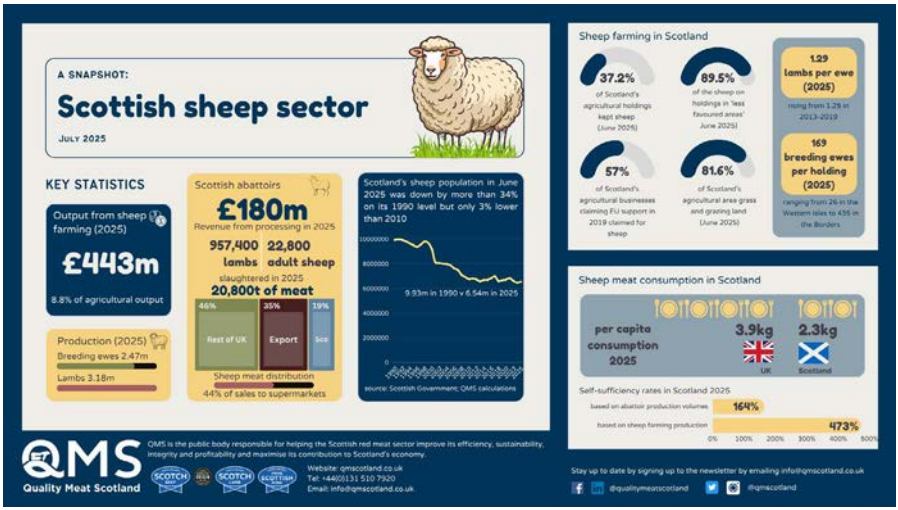


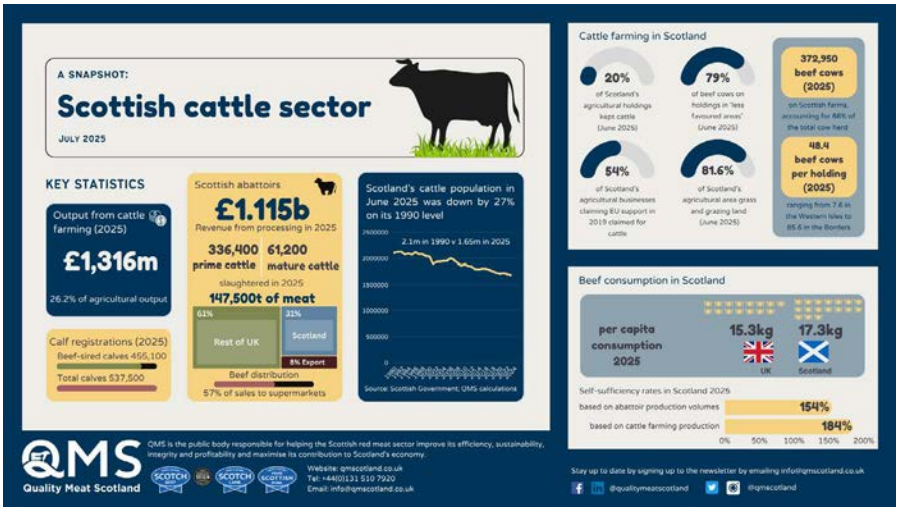
Source: Quality Meat Scotland; the Scottish Red Meat Sector Economic Impact Report 2023[37]

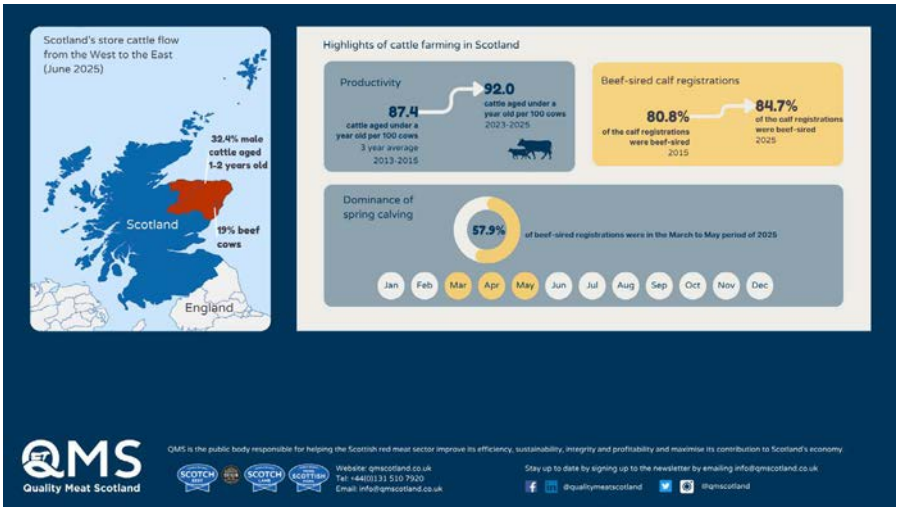
37 Please note since 2023, the total value of the Scottish red meat supply chain has increased, reaching £4.2bn of output and £1.3bn of GVA in 2025.

Sector snapshots in Scotland






A SNAPSHOT:
Scottish cattle sector
JULY 2025
KEY STATISTICS
Output from cattle farming (2025)
£1,316m
26.2% of agricultural output
Calf registrations (2025)
Beef-sired calves 456,100
Total calves 537,500
Scottish abattoirs
£1.115b
Revenue from processing in 2025
336,400 prime cattle
61,200 mature cattle
slaughtered in 2025
147,500t of meat
61%
Rest of UK
31%
Scotland
8% Export
Beef distribution
57% of sales to supermarkets
Scotland's cattle population in June 2025 was down by 27% on its 1990 level
2.1m in 1990 v 1.65m in 2025
2500000
2000000
1500000
1000000
500000
0
Source: Scottish Government; QMS calculations
Cattle farming in Scotland
20%
of Scotland's agricultural holdings kept cattle (June 2025)
79%
of beef cows on holdings in 'less favoured areas' (June 2025)
372,950 beef cows (2025)
on Scottish farms, accounting for 84% of the total cow herd
54%
of Scotland's agricultural businesses claiming EU support in 2019 claimed for cattle
81.6%
of Scotland's agricultural area grass and grazing land (June 2025)
48.4 beef cows per holding (2025)
ranging from 7.6 in the Western Isles to 85.6 in the Borders
Beef consumption in Scotland
per capita consumption 2025
15.3kg
UK
17.3kg
Scotland
Self-sufficiency rates in Scotland 2026
based on abattoir production volumes
154%
based on cattle farming production
184%
0%
50%
100%
150%
200%
QMS
Quality Meat Scotland
QMS is the public body responsible for helping the Scottish red meat sector improve its efficiency, sustainability, integrity and profitability and maximise its contribution to Scotland's economy.
Website: qmscotland.co.uk
Tel: +44(0)131 510 7920
Email: info@qmscotland.co.uk
Stay up to date by signing up to the newsletter by emailing info@qmscotland.co.uk
@qualitymeatscotland
@qmscotland


Scotland's store cattle flow from the West to the East (June 2025)
32.4% male cattle aged 1-2 years old
Scotland
19% beef cows
England
Highlights of cattle farming in Scotland
Productivity
87.4
cattle aged under a year old per 100 cows
3 year average
2013-2015
92.0
cattle aged under a year old per 100 cows
2023-2025
Beef-sired calf registrations
80.8%
of the calf registrations were beef-sired
2015
84.7%
of the calf registrations were beef-sired
2025
Dominance of spring calving
57.9%
of beef-sired registrations were in the March to May period of 2025
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
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QMS current programmes

Monitor Farm Programme 2022-2026
The aim of the programme is to help to build resilient, dynamic farms focused on reaching full economic, social, and environmental sustainability, by optimising production.

The programme is led by QMS and AHDB, for more information contact monitorfarm@qmscotland.co.uk

The Scotch Butchers Club
The Scotch Butchers Club positions butchers as the 'champions of Scotch' by promoting their skill, craftmanship and knowledge to consumers via marketing campaigns, across multiple media channels, and in-store point of sale. It also offers members a host of enhanced benefits and proudly advocates butcher careers.

For more information, contact sbc@qmscotland.co.uk

The Scotch Beef Club
QMS champion and are actively recruiting for Scotch Beef Club members - a network of restaurants committed to serving quality-assured Scotch Beef, Scotch Lamb and/or Prime Scottish Pork from trusted Scottish farms. If you own, manage, or know of a restaurant that would be a great fit for the Scotch Beef Club, please get in touch at info@qmscotland.co.uk

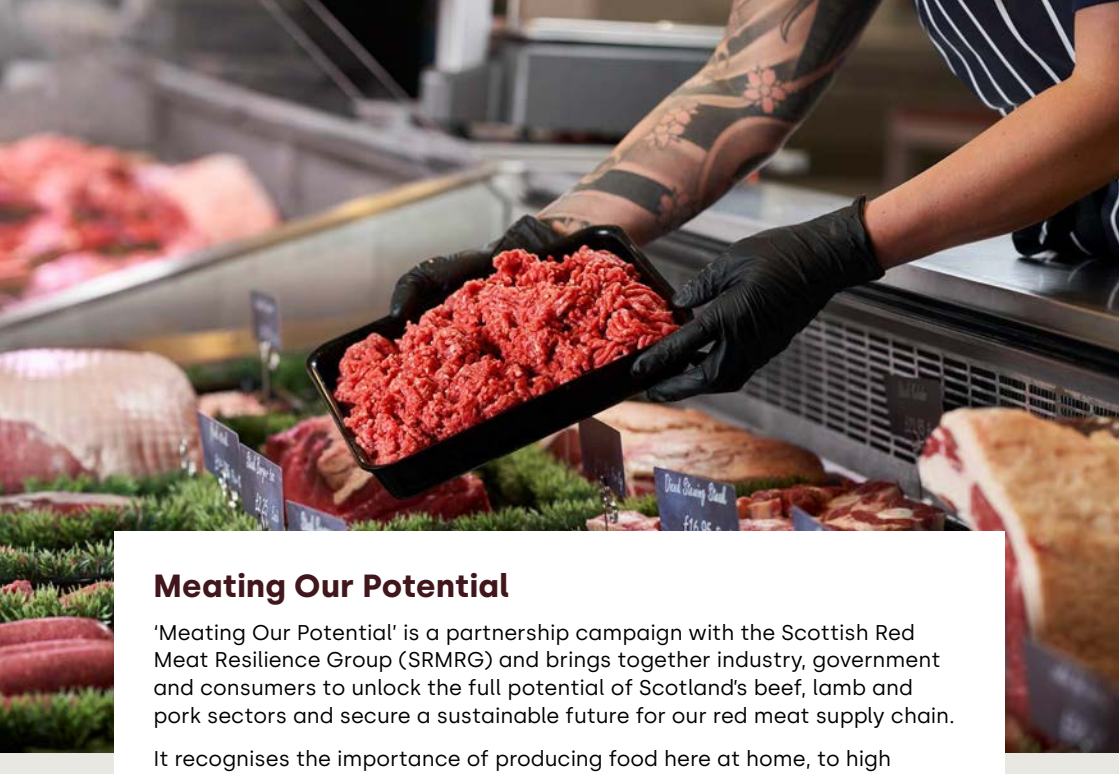
Make It Scotch
Make it Scotch is the umbrella brand that is the home of the flagship brands of the Scottish red meat industry, Scotch Beef, Scotch Lamb and Prime Scottish Pork. From TV adverts to social media, press features to billboards, we encourage consumers to get in the know at makeitscotch.com to truly understand the Scotch Difference and what lies behind the renowned blue labels.

Make it Scotch is also proud of offer a variety of resources and initiatives to help support educators bring the journey of red meat, from farm to fork, to life for pupils in an engaging and informative way.

Our online hub hosts lesson plans, worksheets and details on how you can book a visit from a Make it Scotch Ambassador to deliver a cookery demonstration or talk.

Baselining Project
QMS are working with AHDB and HCC to conduct a UK-wide baselining project that will gather accurate information on the levels of sequestration on farm. The project will measure soil carbon, soil nutrients, and will use innovative technology to gather information on the GHG emissions that are captured by vegetation, trees, hedges, and crops.

For more information on the project contact Bruce McConachie bmcconachie@qmscotland.co.uk



Meating Our Potential

'Meating Our Potential' is a partnership campaign with the Scottish Red Meat Resilience Group (SRMRG) and brings together industry, government and consumers to unlock the full potential of Scotland's beef, lamb and pork sectors and secure a sustainable future for our red meat supply chain.

It recognises the importance of producing food here at home, to high standards of quality, traceability and animal welfare, while making the most of Scotland's natural strengths and grass-based systems.

'Meating Our Potential' sets out how we can work together to support producers, strengthen rural communities and ensure Scotland continues to deliver the red meat that consumers trust and value – now and for the future.

Find out more -
Meating Our Potential - Quality Meat Scotland

Quality Meat Scotland's Weekly Newsletter

By subscribing to the mailing list for our newsletter, readers have access to exclusive content straight to their inbox, keeping them informed about everything related to the sector.

From the latest QMS news to issues affecting the wider industry, readers can expect plenty of expert analysis, development updates as well as the latest job vacancies.

Stay up to date by signing up to the newsletter by emailing info@qmscotland.co.uk

The latest market prices can be viewed on the QMS website at: https://qmscotland.co.uk/market-intelligence/market-prices

Keep up to date with the latest views on the red meat industry by listening to our podcast: https://qmscotland.co.uk/news-resources/podcast

QMS
Quality Meat Scotland

For more information on QMS visit
www.qmscotland.co.uk and follow
@qmscotland on social media

@qualitymeatscotland

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