

Scotland at a glance

Total red meat	Beef	Lamb	Pork
			
Latest 12 weeks Spending +8.4% Volume +1.8% Avg price £/kg +6.5%	Latest 12 weeks Spending +9.6% Volume -1.0% Avg Price £/kg +10.7%	Latest 12 weeks Spending -5.8% Volume -18.2% Avg Price £/kg +15.3%	Latest 12 weeks Spending +4.2% Volume +7.9% Avg Price £/kg -3.5%

Scotland: Pork Leads Red Meat Volume Recovery Amid Easing Inflation

Total spending on red meat in Scotland remained elevated compared with last year, and the rate of growth rose slightly to 8.4%. It is notable that overall volumes increased by 1.9% year-on-year, driven primarily by pork. Scotland continued to outperform GB, as GB saw a volume decline of 1.5%.

Beef remained at the heart of Scottish households' red meat purchasing behaviour, accounting for 63.1% of total red meat volume. Supported by warmer weather and major sporting events, beef steak sales continued to perform strongly, with volumes increasing by 19.4% year-on-year, reaching their highest level since June 2022. The growth was largely driven by an increase in BBQ occasions. In addition, beef steak prices continued to ease, with the average price falling by £1.5/kg compared with April, when average prices peaked at £23.71/kg, which likely provided a further boost to sales.



Lamb volumes declined compared with last year, primarily due to a sharp fall in roasting joint sales. Some of this volume decline could be a switching effect, as beef roasting prices increased rapidly in the second half of 2025, driving growth in lamb roasting volumes during that period. In addition, lower lamb supplies were potentially impacting volumes as well. However, grilling occasions continued to support demand for lamb steaks, with volume growth of 30.2%.

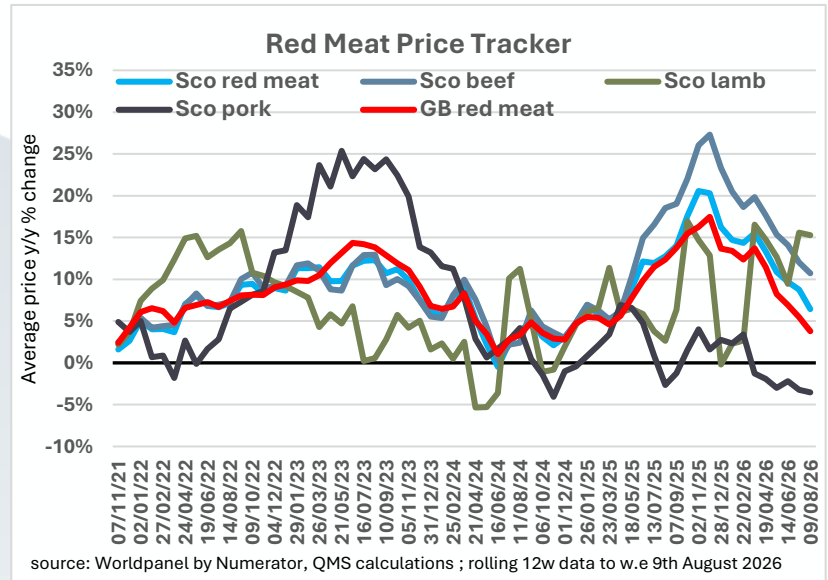
Primary pork volume saw a strong growth in Scotland, up by 7.9%, primarily driven by pork mince. As one of the category's most versatile cuts, pork mince maintained strong momentum, with volumes growing by 40%. Some of this increase could be due to consumers trading down from beef mince. Pork chops, as another popular grilling option, also performed well during the summer period, recording a year-on-year volume increase of 14.2%. Pork volume was well above the five-year average and ahead of the same period in 2021, when lockdown drove take-home grocery sales to an unusually high level.

Despite ongoing cost pressures, demand for red meat remained resilient, supported by favourable weather and summer sporting events. The recovery in volume sales is an encouraging sign for the industry. Looking ahead, softening food inflation is expected to continue boosting consumer confidence, supporting sales of quality red meat for both everyday meals and special occasions. In addition, Love Lamb Week in September is expected to provide a further boost to lamb sales.

Price Inflation

Red meat price inflation in Scotland continued to dip in August, following a softening trend since peaking in November 2025 and remains above the GB average. Despite a softening inflation level, Scottish red meat prices marked a new historical high of £11.31/kg.

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



	 Spending Million £	Spending yoy	 Volume kg	Volume yoy	 £/kg	Avg price yoy	
	Primary beef	£59.6	9.6%	4.45m	-1.0%	13.40	10.7%
	Beef diced	£3.8	17.3%	0.32m	19.4%	12.02	-1.8%
	Beef mince	£25.1	-3.3%	2.59m	-10.4%	9.69	7.9%
	Beef roasting	£4.3	40.1%	0.33m	27.8%	13.25	9.6%
	Beef steak	£25.5	23.2%	1.15m	19.4%	22.21	3.1%
	Primary lamb	£6.0	-5.8%	396.5k	-18.2%	15.02	15.3%
	Lamb chop*	£1.4	-3.7%	88.2k	-6.6%	15.70	3.2%
	Lamb steak	£2.1	46.6%	113.3k	30.2%	18.85	12.6%
	Lamb roasting*	£0.7	-61.3%	48.7k	-65.7%	14.73	12.8%
	Lamb mince*	£0.9	0.5%	70.6k	-11.9%	12.31	14.0%
	Primary pig meat	£12.7	4.3%	1.99m	8.1%	6.38	-3.5%
	Pork chop	£1.6	9.7%	0.22m	14.2%	7.19	-3.9%
	Pork medallion	£0.7	-35.4%	0.07m	-40.4%	9.78	8.4%
	Pork mince	£1.8	35.0%	0.35m	40.1%	5.06	-3.6%
	Pork roasting	£1.8	-3.8%	0.38m	7.0%	4.85	-10.1%
	Pork steak	£3.8	8.3%	0.56m	8.0%	6.80	0.3%

*Low sample size, use with caution