

Scotland at a glance

Total red meat	Beef	Lamb	Pork
			
Latest 12 weeks Spending +4.1% Volume +0.3% Avg price £/kg +3.8%	Latest 12 weeks Spending +4.8% Volume -2.7% Avg Price £/kg +7.7%	Latest 12 weeks Spending -10.4% Volume -20.6% Avg Price £/kg +12.7%	Latest 12 weeks Spending +3.1% Volume +6.8% Avg Price £/kg -3.5%

Easing Inflation Supports Scotland's Resilient Red Meat Market

Total spending on red meat in Scotland remained elevated compared with last year, although the rate of growth slowed to 4.1%. Notably, overall volumes edged up by 0.3% year on year, driven primarily by pork. Scotland continued to outperform GB, where volumes declined by 1.7%.

Beef remained at the heart of Scottish households' red meat purchasing behaviour; however, its share slid by nearly 2 percentage points to 62.4% of total red meat volume, while pork gained volume share. Despite this, beef steak sales continued to perform strongly, with volumes increasing by 8.5% year on year and exceeding those recorded during the same period in 2024, 2023 and 2022. Growth was largely driven by an increase in BBQ occasions. Diced beef was another winning cut, with volumes rising by 19% year on year as the move into autumn increased demand for more comforting dishes.



Lamb volume declined compared with last year, primarily due to a sharp fall in roasting joint sales. Some of this decline may reflect consumers switching to more affordable pork roasting joints, which gained volume. Lower lamb supplies may also have affected volumes. However, grilling occasions continued to support demand for lamb steaks, with volumes growing by 36.4%, possibly because they remained a cheaper alternative to beef steak.

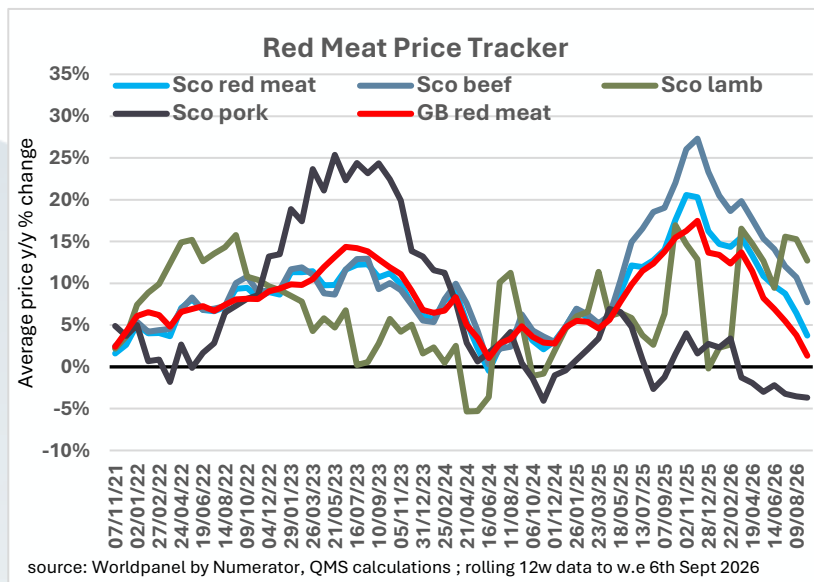
Primary pork volumes continued to grow strongly in Scotland, rising by 6.8%, primarily driven by pork mince, pork belly and pork steak. As one of the category's most versatile cuts, pork mince maintained strong momentum, with volumes growing by 23%. Some of this increase may have resulted from consumers trading down from beef mince. Pork steak, another popular grilling option, also performed well during the summer, recording a year-on-year volume increase of 13.1%. Growth in pork belly volumes may have been influenced by the ongoing trend for Asian flavours and cuisines.

Despite ongoing cost pressures, demand for red meat remained resilient. While some consumers traded down within the category, the continued recovery in overall red meat volumes highlights its role as a key component of household meals. Looking ahead, easing meat price inflation is expected to boost consumer confidence further, supporting demand for quality red meat across both everyday and special occasions. With cooler temperatures approaching, autumn is also expected to increase demand for slow-cooking cuts and hearty, comforting dishes.

Price inflation

Red meat price inflation in Scotland continued to ease in September, maintaining the downward trend seen since its peak in November 2025, although it remained above the GB average. As inflation softened, Scottish red meat prices declined slightly to £11.15/kg after reaching a historic high.

Scottish beef inflation fell below its previous 2023 peak and continued to ease. Meanwhile, higher farmgate lamb prices continued to support relatively high lamb price inflation, making lamb the sector with the highest inflation. By contrast, pork deflation remained relatively stable, reflecting softer conditions at the farmgate.



Spending
Million £

Spending yoy



Volume kg

Volume yoy



£/kg

Avg price yoy



Primary beef	£57.4	4.8%	4.35m	-2.7%	13.20	7.7%
Beef diced	£3.6	19.2%	0.31m	19.1%	11.86	0.1%
Beef mince	£25.3	-2.2%	2.61m	-6.2%	9.70	4.2%
Beef roasting	£3.8	6.5%	0.30m	-4.0%	12.97	11.0%
Beef steak	£23.7	14.6%	1.06m	8.5%	22.32	5.7%



Primary lamb	£6.3	-10.4%	418.7k	-20.6%	14.96	12.7%
Lamb chop*	£1.5	-8.9%	92.3k	-10.3%	15.85	1.5%
Lamb steak	£2.1	54.6%	114.0k	36.4%	18.74	13.4%
Lamb roasting*	£0.7	-63.5%	50.5k	-65.5%	14.67	5.6%
Lamb mince*	£0.9	-9.2%	78.2k	-14.7%	11.91	6.4%



Primary pork	£12.5	3.1%	1.97m	6.8%	6.33	-3.5%
Pork chop	£1.2	-15.2%	0.19m	-4.8%	6.70	-10.9%
Pork belly*	£1.4	64.6%	0.17m	73.4%	8.16	-5.1%
Pork mince	£1.8	17.3%	0.36m	23.0%	5.00	-4.7%
Pork roasting	£1.8	-11.3%	0.37m	0.6%	4.73	-11.8%
Pork steak	£3.8	12.1%	0.56m	13.1%	6.78	-0.9%

*Low sample size, use with caution