

Scottish Red Meat Industry Profile 2026

The Scottish Red Meat Industry Profile highlights the importance of the sector to Scotland's rural economy. It provides stakeholders with up-to-date statistics on farming, processing, consumption and trade to improve transparency across the supply chain.

In 2025, Scotland's red meat supply chain contributed a record £4.2bn of output and almost £1.3bn of Gross Value Added (GVA) to the Scottish economy, up nearly 19% year on year. This includes output from the farming and processing of cattle, sheep and pigs plus the economic activity generated by the sector's important supply chain network. Growth was driven largely by higher cattle and sheep prices.

While the sector continues to make significant economic and social contributions to Scotland, the Profile still reflects long-term challenges facing the red meat sector. Among the challenges are declining livestock numbers, pressure on processing capacity, labour costs, competition from cheaper imports and building pressure on the pig sector. Nevertheless, consumer demand remains strong for red meat and opportunities to add more value to Scotland's economy provide grounds for optimism.



Key Findings

- £3.3bn in combined output for farming and processing, rising to £4.2bn with wider economic activity included, up nearly 19% year on year - a record contribution to Scotland's economy
- Significant market volatility returned in 2025 after a more settled 2024 with sharply increased cattle prices and higher sheep prices driving record sector output
- Livestock numbers continue to decline. Despite the pace of reduction slowing, the beef herd is down 10.4% from 2021 and 16.2% from 2015. The pig herd contracted sharply, while the ewe flock showed signs of recovery after three years of decline, but was still down 4.6% from 2015
- In the pig sector, breeding sow slaughter rose by 34% in the first half of the year, signalling a further loss of around 10% of the sow herd, with implications for future prime pig supplies and pork production
- Underlying demand for red meat remains resilient, supported by consumer interest in high protein and avoidance of ultra processed foods

Strong Sheep Sector

The sheep sector has had another strong year following record producer prices, export growth and signs of flock recovery. Average Scottish prime sheep prices have reached a new historical high of £3.28 per kg liveweight, rising 52.1% over the past five years.

An improved lambing rate, rebound in abattoir production in Scotland and stronger market signals have rebuilt confidence in the sector after three years of decline in the ewe flock.

Import Competition Highlights Food Security Challenge

A growing UK population, underlying demand for red meat and declining domestic livestock production mean UK consumers will be more reliant on imports should domestic production not strengthen. In the hospitality sector, there was a significant level of switching toward highly competitively priced beef from non-EU imports in 2025. Increased imports of specific higher value cuts can have an even more destabilising effect on the domestic market than suggested by the volume of meat alone, affecting carcass balance. For example, the imported volume of striploins from 22 cattle is equivalent to the weight of just a single domestic carcass. The trend underlines the importance of strengthening domestic production in a geopolitically volatile environment where food security and supply chain resilience are increasingly critical.

Underlying Consumer Demand

Despite challenges, underlying demand for red meat remained resilient in 2025, supported by consumer preferences toward high protein and less processed foods. While strong wage growth supported consumer spending, a growing preference toward natural sources of protein drove primary meat consumption, supporting red meat sales.

Declining Livestock Numbers and Processing Pressures

Livestock numbers remain a long-term concern for the red meat sector as Scotland's beef herd continues to decline despite the pace of reduction slowing. Beef cow numbers are down 10.4% from 2025 and since 2015, down 16.2%. The pig herd contracted sharply in 2025 with a 12% loss of breeding sows reported in the June 2025 census results, while the ewe flock showed signs of recovery after three years of decline.

Such declines have created challenges for the processing sector which has recently seen the closure of one of Scotland's largest abattoirs, reducing competition for cattle in the second half of 2025. The Meating Our Potential campaign, led by QMS in partnership with the Scottish Red Meat Resilience Group, is working to reverse declining livestock numbers and realise an estimated growth opportunity of around £350 million of output and £100 million of GVA by 2032 across Scotland's red meat sector.

Pig Sector Weakness

Pressure continued to build on the pig sector in the second half of 2025 due to falling farmgate prices and external shock from falling EU pig and pork prices due to increased production, higher tariffs on EU pork in China and an African Swine Fever (ASF) outbreak in Spain. Into 2026, unsustainable market conditions have prevailed with Scottish prices falling below the cost of production. In turn, breeding sow slaughter rose by 34% in the first half of the year, signalling a further loss of around 10% of the sow herd, with implications for future prime pig supplies and pork production.

In response, the Scottish Government has provided £2 million of direct support to independent Scottish pig producers. QMS and pig industry partners continue to work closely with government to tackle critical issues and longer-term challenges impacting profitability.

Summary

Scotland's red meat industry is facing a perfect storm of rising costs and falling livestock numbers. Despite that, the sector continues to prove its resilience by delivering record economic value to Scotland. Strong consumer demand, higher cattle and sheep prices and growth in processing turnover demonstrate the sector's resilience and importance to Scotland's rural economy.

Ongoing challenges within the Profile reinforce the need for continued industry and government collaboration to support long-term sustainability and ensure the sector can continue to contribute to Scotland's economy, rural communities and food security.



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