Retail Market Update

Data source: Worldpanel by Numerator UK, primary red meat only,
For 12 weeks ending 4th Oct 2026; **Please note enhanced panel implemented from this period**

Scotland at a glance

Total red meat	Beef	Lamb	Pork
			
Latest 12 weeks Spending +7.4% Volume +7.0% Avg price £/kg +0.4%	**Latest 12 weeks** Spending +8.6% Volume +4.9% Avg Price £/kg +3.6%	**Latest 12 weeks** Spending -11.2% Volume -18.9% Avg Price £/kg +9.5%	**Latest 12 weeks** Spending +7.4% Volume +14.7% Avg Price £/kg -6.3%

Steaks shine and pork surges in Scotland



Total spending on red meat in Scotland remained elevated compared with last year, primarily driven by a notable increase in volume. While the volume increase was partly attributable to last year's drop in volume due to high inflation, volumes have surpassed 2024 levels. Scotland continued to outperform GB, where both spending and volume saw a slight decline.

Beef remained at the heart of Scottish households' red meat purchasing behaviour; however, its share slid by nearly 1.3 percentage points year on year to 63.8% of total red meat volume, while pork gained volume share. Despite this, beef steak sales continued to perform strongly, with volumes increasing by 14.6% year on year and reaching their highest level since records began in 2022. Growth was largely driven by more shoppers returning to the category and increased volume per trip. Diced beef was another winning cut, with volumes rising by 8.4% 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 saw significant volume gains. Lower lamb supplies may also have affected volumes. Lamb steaks continued their upward trend since 2025, with volumes growing by 2.9% year on year, possibly because they remained a cheaper alternative to beef steak.

Primary pork volumes surged in Scotland, rising by 14.7%, primarily driven by pork steaks and pork roasting joints. Pork steak volumes have risen rapidly recently and reached their highest level since April in 2022, with a year-on-year increase of nearly 17%, as more new shoppers were attracted to the cut. As one of the category's most versatile cuts, pork mince maintained strong momentum, with volumes growing by 12.5%. Some of this increase may have resulted from consumers trading down from beef mince. The trading-down effect may also have contributed to growth in pork roasting joint volumes, up by 29%.

Red meat retail demand in Scotland was strong heading into autumn, reflecting a recovery from last year's demand, which was suppressed by high price inflation. Steak formats appeared to be a favourite on consumers' plates, while cuts for comforting dishes are picking up. In the run-up to Christmas, more gatherings featuring red meat will take place as shoppers try to plan ahead, while premium formats, a popular choice for special occasions, will also gain momentum.

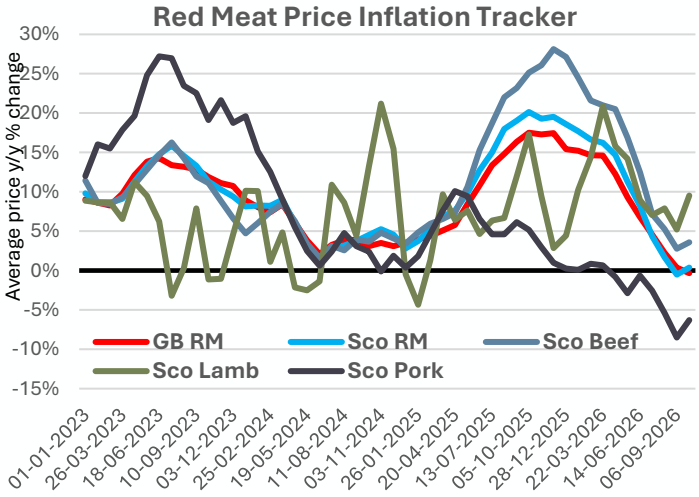
Retail Market Update

Data source: Worldpanel by Numerator UK, primary red meat only,
For 12 weeks ending 4th Oct 2026; **Please note enhanced panel implemented from this period**

Price inflation

Red meat price inflation in Scotland rebounded after a year-long downward trend, with prices just 0.4%, or 4p/kg, above year-earlier levels. Scottish red meat prices rose to £11.37/kg after marking a historic high of £11.53/kg in March.

Scottish beef price inflation rebounded slightly as farmgate prices gradually caught up with last year's levels. Meanwhile, higher farmgate lamb prices continued to support relatively high lamb price inflation, making lamb the sector with the highest inflation. By contrast, pork price deflation hit a low of -8.5% before rebounding slightly, reflecting softer conditions at the farmgate.



Source: Worldpanel by Numerator, QMS calculations ; rolling 12w data to w.e 4th October 2026

	Spending Million £	Spending yoy	Volume kg	Volume yoy	£/kg	Avg price yoy
Primary beef	**£64.9**	**8.6%**	**4.87m**	**4.9%**	**13.33**	**3.6%**
Beef diced	£3.8	8.3%	0.32m	8.4%	11.88	-0.1%
Beef mince	£27.5	3.8%	2.82m	2.5%	9.75	1.3%
Beef roasting	£4.5	10.6%	0.29m	-3.5%	15.48	14.6%
Beef steak	£27.6	16.3%	1.33m	14.6%	20.82	1.4%
Beef stewing	£0.7	-34.4%	0.06m	-33.3%	12.08	-1.6%
Primary lamb	**£6.4**	**-11.2%**	**407.9k**	**-18.9%**	**15.68**	**9.5%**
Lamb chop	£1.6	-19.8%	93.9k	-26.7%	17.33	9.4%
Lamb steak	£1.8	16.4%	92.8k	2.9%	19.10	13.0%
Lamb roasting*	£0.5	-70.5%	37.6k	-65.5%	14.08	-14.5%
Lamb mince	£1.2	27.6%	82.1k	0.9%	14.67	26.5%
Primary pork	**£13.7**	**7.4%**	**2.11m**	**14.7%**	**6.51**	**-6.3%**
Pork chop	£1.6	18.7%	0.20m	27.6%	7.81	-7.0%
Pork mince	£2.1	10.0%	0.40m	12.5%	5.26	-2.2%
Pork roasting	£2.2	26.2%	0.35m	28.8%	6.42	-2.0%
Pork steak	£3.7	13.4%	0.56m	16.9%	6.56	-3.0%
Pork fillet	£0.7	-35.5%	0.11m	-23.6%	6.13	-15.5%
Pork belly	£1.3	10.3%	0.18m	26.2%	7.27	-12.6%

*Low sample size, use with caution

From 14 October, Worldpanel by Numerator expanded its panel from 30,000 to 55,000 households, providing a broader and more representative view of shopper behaviour. As a result of this enhancement, some reported figures may differ from previous publications. Any changes in the data are attributable to the expanded panel and its improved representation of shoppers. Please contact the team if you have any questions.