

# Strong Christmas Performance for Red Meat as shoppers Protect Festive Celebrations



## Shoppers Prioritise Festive Celebrations Despite Food Price Inflation

Food price inflation was a defining theme of 2025, and shoppers' cautious spending behaviour had a notable impact on red meat volume sales throughout the year. We expected this trend probably to continue over the Christmas period; however, shoppers told a different story.

According to IGD, 65% of shoppers spent what they wanted on their Christmas celebrations, compared with 58% in 2024. Focus group interviews revealed a strong determination among consumers to protect their festive occasions, with high quality meat remaining at the heart of celebrations.

This sentiment is also reflected in sales of primary red meat, according to data from Worldpanel by Numerator. For the four weeks ending 28th December 2025, shoppers' spending on primary red meat increased by 8.3% in Great Britain and surged by 14.2% in Scotland. Volumes also grew, rising by 0.9% in Great Britain and a stronger 3.0% in Scotland.

## Strong Performance Across Beef, Lamb and Pork

Beef, lamb and pork all recorded sales growth over Christmas. In Great Britain, value sales increased by 7.8% for beef, 10.5% for lamb and 6.8% for pork, while Scotland saw even stronger growth at 11.3%, 23.4% and 19.9% respectively.

Lamb and pork also delivered notable volume growth. In Great Britain, lamb volumes rose by 14.1% and pork by 7.7%, while beef volumes declined by 7.1%. In Scotland, lamb volumes surged by 27.6% and pork by 9.9%, with beef down by a smaller 3.6%.

Despite beef's weaker volume performance, it remained the dominant protein during the festive period, accounting for 51% of primary red meat volume in Great Britain and an even larger 63% in Scotland. This highlights the continued popularity of beef among Scottish consumers.

	UK	SCOTLAND
	Volume -7.1%	Volume -3.6%
	Spend +7.8%	Spend +11.3%
	Volume +14.1%	Volume +27.6%
	Spend +10.5%	Spend +23.4%
	Volume +7.7%	Volume +9.9%
	Spend +6.8%	Spend +19.9%

Source: Worldpanel by Numerator, primary red meat, 4 weeks ending 28<sup>th</sup> Dec 2025



## Roasting Cuts Lead Festive Demand

Roasting joints continued to dominate festive purchases, accounting for nearly half of primary red meat volume sold in Great Britain. Beef roasting led within this category, with volumes increasing by 4.4% compared with last Christmas. Lamb roasting volumes rose by 16.9%, while pork roasting grew by 13.0%.

Across all primary red meat cuts, pork mince delivered the strongest volume growth, surging by 61% year on year. This reflects its position as the most affordable cut and highlights shoppers' savvy approach to balancing value with quality.

## Wider Meat, Fish and Poultry Trends

Looking more broadly at primary meat, fish and poultry (MFP), total volumes increased by 3.7% over the festive period. Chicken, as an affordable protein, continued to perform strongly, with spending up 10.3% and volumes rising by 7.1%.

Turkey, however, experienced a steep decline. Spending fell by 16.2% in the fresh category and by 12.6% in frozen, suggesting a shift away from traditional turkey purchases at Christmas.

## Context for beef, sheep and pig producers

Beef sales may have exceeded initial expectations over Christmas, helping to stabilise farmgate prices around the turn of the year after a fortnight of significant declines in mid-December. Meanwhile, strong lamb sales continued to ensure that lamb prices remained close to record highs for the time of year at the start of 2026. Meanwhile, at a challenging time for pig producers, positive sales over the Christmas period highlights that domestic demand remains strong.

## Summary

Overall, shoppers demonstrated a stronger determination this Christmas to protect their festive celebrations, with high-quality meat playing a central role, and positive demand continued to underpin livestock producers' returns at the start of 2026. Traditional roasting cuts won shoppers' hearts, while affordable options also proved popular. Scotland outperformed Great Britain overall, underlining the resilience of Scottish red-meat consumption despite ongoing price inflation.