

Retail Market Update

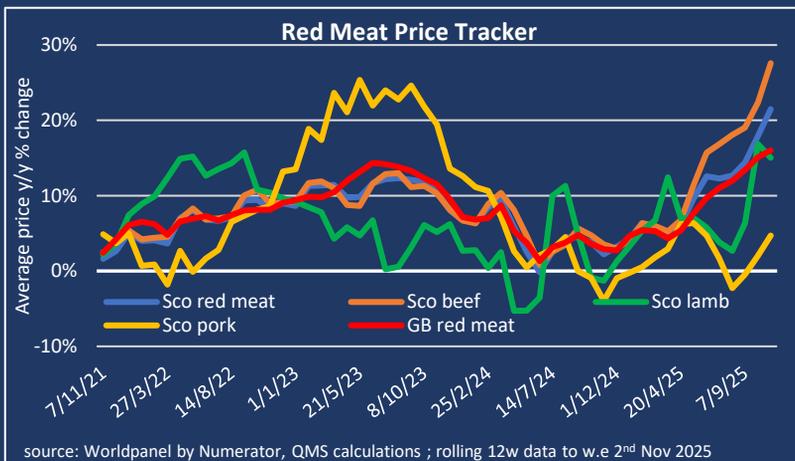
For the 12 weeks ending 2nd November 2025
Data source: Worldpanel by Numerator UK, primary red meat only

Scotland At A Glance

Total red meat	Beef	Lamb	Pork
			
Latest 12 weeks Spending +19.5% Volume -1.6% Avg price £/kg +21.5%	Latest 12 weeks Spending +20.1% Volume -5.9% Avg Price £/kg +27.6%	Latest 12 weeks Spending +31.6% Volume +14.4% Avg Price £/kg +15.0%	Latest 12 weeks Spending +9.5% Volume +4.9% Avg Price £/kg +4.4%

Scotland: Red Meat Market Shows Exceptional Resilience In The Run-up To Christmas

Total spending on red meat in Scotland continued to rise at a faster rate of 19.5% compared to last year, driven mainly by a rising price inflation. Growth was recorded across beef, lamb and pork, with lamb and pork continuing to see volume uplifts. Beef continues to hold its place at the heart of Scottish households, accounting for 64.5% of total red meat volume. Beef stew, favoured during colder months, saw volume increase of 5.4%. Lamb continued to be a standout performer, with lamb steak volumes surging by nearly 63.4%, underlining consumers' appetite for premium cuts. Pork also benefitted from its strong value position, with chops, roastings and steaks all delivering volume gains. Some of this growth reflects shoppers switching from beef into pork as beef prices continue to surge, making pork a more affordable alternative. Overall, demand for quality red meat is building as usual in the run-up to Christmas. Scottish consumers appear less affected by price inflation than those across GB, highlighting the resilience of Scotland's red meat market.



Price inflation

- Red meat price inflation in Scotland has accelerated in 2025, reaching a new high of 21.5% in November - above GB level of 16% for the 12 weeks ending 2/11/25.
- Overall red meat price inflation is being driven by all three proteins. Scottish beef inflation has surged sharply since early 2025, now at around 28%, as the surge in farmgate prices in 2025 has passed through to consumer prices.

Red meat cuts in Scotland

	Spending Million £	Spending yoy	Volume kg	Volume yoy	£/kg	Average price yoy
 Primary beef	£63.7	20.1%	4.95m	-5.9%	12.85	27.6%
Beef diced	£4.4	-5.1%	0.37m	-15.1%	11.80	11.7%
Beef mince	£30.5	40.8%	3.05m	-1.3%	10.00	42.7%
Beef roasting	£4.6	-6.4%	0.35m	-24.8%	13.06	24.4%
Beef steak	£21.8	9.8%	0.98m	-10.3%	22.32	22.4%
Beef stewing	£1.9	15.2%	0.16m	5.4%	11.94	9.2%
 Primary lamb	£7.8	31.6%	586.3k	14.4%	13.24	15.0%
Lamb chop	£1.7	5.2%	115.5k	-4.9%	14.65	10.7%
Lamb steak	£1.8	67.5%	108.4k	63.4%	16.82	2.5%
 Primary pig meat	£12.9	9.5%	1.97m	4.9%	6.56	4.4%
Pork chop	£1.4	17.8%	0.19m	6.2%	7.60	11.0%
Pork medallion	£0.8	-13.0%	0.08m	-20.5%	9.78	9.5%
Pork mince	£1.9	-2.7%	0.36m	-1.6%	5.17	-1.1%
Pork roasting	£2.2	14.7%	0.43m	14.8%	5.24	-0.1%
Pork steak	£3.8	13.9%	0.50m	0.7%	7.49	13.1%

*Low sample size, use with caution