

# Retail Market Update

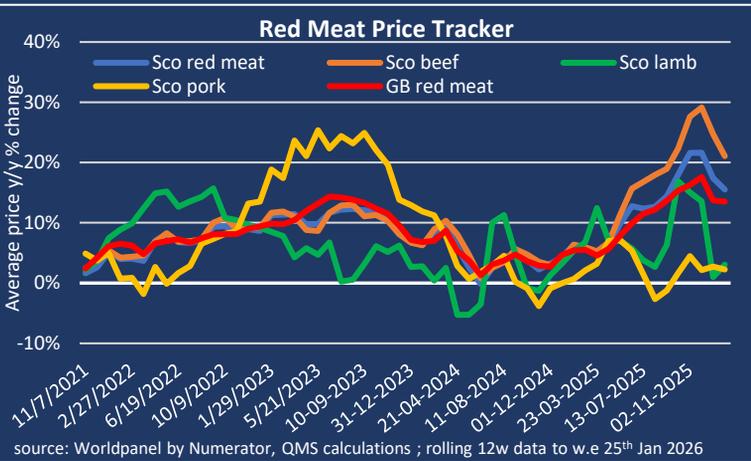
For the 12 weeks ending 25<sup>th</sup> Jan 2026  
Data source: Worldpanel by Numerator UK, primary red meat only

## Scotland At A Glance

Total red meat	Beef	Lamb	Pork
			
<b>Latest 12 weeks</b> Spending +14% Volume -1.3% Avg price £/kg +15.5%	<b>Latest 12 weeks</b> Spending +15% Volume -5% Avg Price £/kg +21.1%	<b>Latest 12 weeks</b> Spending +14.8% Volume +11.4% Avg Price £/kg +3.1%	<b>Latest 12 weeks</b> Spending +7.5% Volume +5.2% Avg Price £/kg +2.2%

## Scotland: Stronger demand for red meat than expected

Total spending on red meat in Scotland continued rising, up by 14% year-on-year, driven mainly by price inflation. Spending growth was recorded across beef, lamb and pork, with lamb and pork continuing to see volume uplifts. Beef remained at the heart of Scottish households' buying habits, accounting for 65.4% of the total red meat volume. Lamb continued to be a standout performer, with lamb steak volumes surging by 74%, underlining consumers' appetite for premium cuts. Pork benefitted from its strong value proposition, with mince volumes increasing by nearly 20%. It reflects shoppers switching from beef into pork following a surge in beef prices, making pork a more affordable alternative. Supported by festive demand, roasting cuts across the three species all saw volume growth, with pork particularly prominent, up 32%, while discounts on beef and lamb roasts helped support sales. Overall, demand for quality red meat remains strong, with seasonal celebrations boosting festive cuts. Scottish consumers appear to be 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 was high throughout 2025, peaking in November at 21.6%. However, it did show signs of softening in the new year, slipping to 15.5% in the 12 weeks ending 25/1/26, though this was still above the GB level of 13.5%.
- Overall red meat price inflation is being driven mainly by beef. Scottish beef inflation peaked around 29% in November, softening to around 21% in January.

## Red meat cuts in Scotland

	 Spending Million £	Spending yoy	 Volume kg	Volume yoy	 £/kg	Average price yoy
 <b>Primary beef</b>	<b>£67.3</b>	<b>15.0%</b>	<b>5.36m</b>	<b>-5.0%</b>	<b>12.57</b>	<b>21.1%</b>
Beef diced	£6.7	15.9%	0.55m	-1.8%	12.26	18.0%
Beef mince	£28.5	27.8%	2.88m	-5.3%	9.89	34.9%
Beef roasting	£10.7	1.2%	0.95m	2.6%	11.28	-1.4%
Beef steak	£19.5	14.1%	0.82m	-6.5%	23.75	22.1%
Beef stewing	£1.6	-18.1%	0.14m	-28.4%	12.09	14.3%
 <b>Primary lamb</b>	<b>£10.3</b>	<b>14.8%</b>	<b>808.8k</b>	<b>11.4%</b>	<b>12.71</b>	<b>3.1%</b>
Lamb chop	£1.4	0.1%	87.8k	-14.2%	16.34	16.7%
Lamb steak	£1.9	82.4%	109.3k	74.3%	17.72	4.6%
Lamb roasting	£4.5	0.3%	412.6k	8.8%	10.97	-7.8%
 <b>Primary pig meat</b>	<b>£12.4</b>	<b>7.5%</b>	<b>1.87m</b>	<b>5.2%</b>	<b>6.62</b>	<b>2.2%</b>
Pork chop	£1.3	16.9%	0.18m	6.6%	7.44	9.6%
Pork medallion	£0.8	-10.3%	0.08m	-11.9%	9.94	1.8%
Pork mince	£1.7	18.8%	0.34m	19.7%	5.08	-0.7%
Pork roasting	£3.3	37.7%	0.55m	31.9%	6.02	4.4%
Pork steak	£2.7	-24.8%	0.38m	-27.9%	7.16	4.3%