
The Scottish Red Meat Industry

Profile



The Scottish Red Meat Industry Profile



Purpose: To highlight the importance of the red meat sector to Scotland's rural economy while providing the full range of industry stakeholders with key statistics for use in their work. It also aims to improve transparency in the supply chain, showing where activity takes place from farm to final market outlet, and where changes in cross-border trade policy would place current activity at risk.

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Data disclaimer:

All deadweight price data used in this report is supplied to QMS by AHDB, who collect the data from reporting abattoirs each week and publish a consolidated set of data, regionally within GB for cattle, and GB-wide for sheep and pigs.

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Please note that figures and rates of change in tables may not sum due to rounding and estimates made for previous editions of this report may have been revised for this publication.

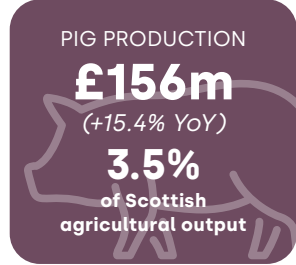
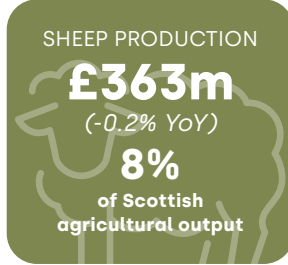
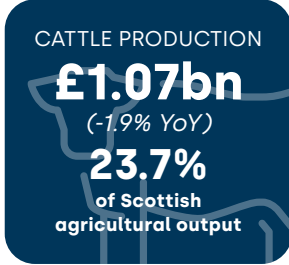
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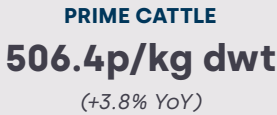
The Scottish Red Meat Industry:

A Snapshot

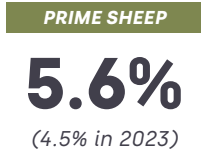
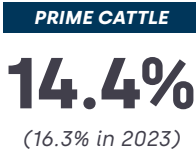
FARMING OUTPUT BY MAIN FARM TYPE IN 2024



FARMGATE AVERAGE PRICES IN 2024



FARM ASSURED PREMIUM AT SCOTTISH AUCTIONS IN 2024

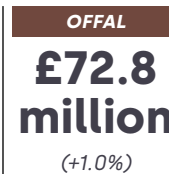
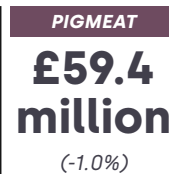
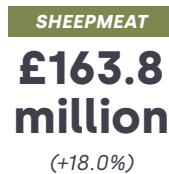
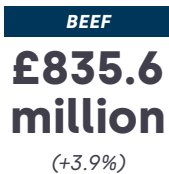


LIVESTOCK POPULATION



ABATTOIR OUTPUT:

£1.14 million (+5.2%)



RED MEAT PROCESSING SALES

SCOTLAND

32%

REST OF UK

54%

INTERNATIONAL EXPORTS

14%

ABATTOIR SECTOR EMPLOYMENT

2,500
employees

PER CAPITA CONSUMPTION
(CARCASE WEIGHT EQUIVALENT)

BEEF

17.7kg

(UK 16.1KG)



50%

are non-UK
nationals

£77

million
of wages

SHEEPMEAT

1.8kg

(UK 4.0KG)



SELF-SUFFICIENCY

BEEF

154.1%
(abattoir)

188.8%
(farm)

SHEEPMEAT

197.3%
(abattoir)

592.2%
(farm)

PIGMEAT

21.9%
(abattoir)

97.3%
(farm)

PIGMEAT

18.3kg

(UK 20.9KG)



EXPORT OF MEAT AND MEAT PREPARATIONS

38,949

tonnes

£138.1m

4th

largest category in
Scottish food & live
animal exports

LIVESTOCK FARMING GREENHOUSE GAS EMISSIONS

Suckler beef

(-1.4% 2023 v 2022)

Sheep

(-1.5% 2023 v 2022)

Introduction

Highlights

In 2024, Scotland's red meat supply chain was, on the surface, more settled after the turbulence of previous years. Increases in beef and lamb prices, along with limited expansion of pig and pork production, led to a record high economic contribution while many input costs stabilised or even dipped back. Combined output from the farming and processing of cattle, sheep and pigs is estimated to have risen by 2% from 2023 and exceeded £2.7bn in 2024. After considering the economic multipliers which ripple out through the Scottish economy due to the sector's interactions with its supplier base, the total impact was as high as £3.5bn of output and £1.05bn of Gross Value Added (GVA) in 2024.

Nevertheless, significant underlying challenges remained and this report highlights the longer-term risk to the economic and social contribution made by Scotland's red meat sector from declining livestock numbers. In 2024, Scotland's beef herd continued to contract at an above-average rate for the third consecutive year, with beef cow numbers down 3.6% on a year earlier and by 14.7% from a decade previously in December, while the ewe flock fell for a third year in a row, down 2.3% in June. A decreasing farming sector has a knock-on effect on the economic prospects of the abattoir sector and vice versa, and decreased farming and processing sectors have an impact on businesses in the wider supply chain as they rely on farming and processing as customers, while risking the loss of skills which have

been crafted and honed over generations. As well as the economic impact of a reduced red meat sector, there can also be a social impact at a local level. Meanwhile, a contraction of domestic production would lead to the need for increased imports to keep up with demand from a growing human population in the UK, putting food security at risk in a geopolitically volatile environment.

One of the main drivers of the downwards trend in breeding cattle and sheep has been a lack of profitability. Despite a further increase in farmgate prices in 2024, input costs remained elevated in a historical context, around one-third above pre-Covid levels, and a tight UK labour market meant that labour cost pressures remained considerable and made it hard to recruit new staff and replace leavers. Meanwhile, elevated interest rates made it costly to service existing loans and overdrafts, and to undertake new investment projects. These variables also affected margins in the processing sector, along with the higher cost of purchasing livestock.

In the beef farming sector, a strong second half of the year saw finished cattle prices reach a new record high in 2024, while store cattle prices rose in line with the finished cattle trade. As highlighted above, seemingly favourable changes in cattle prices failed to prevent a further contraction of the beef herd, but productivity gains and an expansion of the dairy sector did limit the further decline in calf registrations to -0.8% in 2024.

More positively, the outflow of store cattle to finishers in England and Wales slowed further from the peak in 2022 and less cattle moved directly from Scottish farms to abattoirs in England and Wales.

It was a mixed year for the sheep farming sector in 2024 as, on one hand, farmgate prices surged to a new record high while, a very wet spring pushed up mortality rates, weighing on breeding sheep numbers and productivity levels. While lower domestic production contributed to record high producer prices, strong consumer demand was the main driver. Indeed, despite lower lamb production, a surge in imports combined with lower exports pushed up the volume of sheepmeat on the UK market by 8.8% in 2024, without dampening farmgate returns. A smaller lamb crop meant that Scottish sheep farmers failed to fully benefit from this market opportunity.

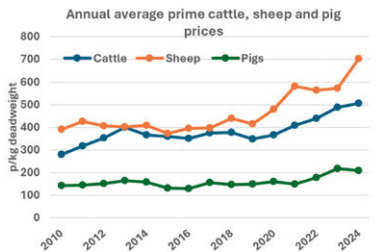
In 2024, the pig sector continued to recover slowly from the financial crisis of 2021/22. Although farmgate prices dipped slightly from the highs of 2023, increased numbers of pigs going to slaughter coupled with positive margins will have supported finances and confidence. Despite a considerable competitive advantage opening for EU pork during the year, imports showed little growth, and a significant rebound in domestic production had a more limited impact on farmgate prices than anticipated. This point about farmgate prices is especially true when considering that overall, UK pigmeat supply increased by around 4% after factoring the changes in import and export volumes, signalling relatively firm demand.

Turnover from primary red meat processing in Scotland is estimated to have risen for a fifth consecutive year in 2024, lifting 5% to £1.14bn. Higher revenue generated from beef and lamb sales, due to modelled increases in wholesale prices, is estimated to have offset a marginal decline in revenue from pork and a fall in hide value. However, higher livestock prices coupled with elevated production costs will have restricted any improvement in margins.

Employment in the primary processing sector is estimated to have fallen further in 2024, partly reflecting restructuring, but also productivity gains. Cattle and sheep throughput fell further, but pig processing expanded, highlighting positive pork market conditions. Meanwhile, the ongoing challenge of retaining and attracting staff saw the proportion of non-UK or European Economic Area (EEA) origin workers increase further, overtaking the EU/EEA share, and a tight labour market ensured that wages rose significantly.

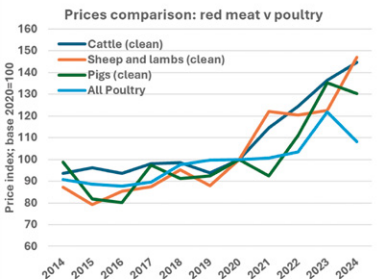


Producer Prices



Source: AHDB; IAAS; QMS calculations
 Deadweight prime cattle prices at Scottish abattoirs; Lamb auction prices at Scottish auction marts; Pig prices are based on GB pig prices*

*Lamb auction price converted to deadweight using an assumed carcass weight that is 45% of the live weight. Pig prices are based on the GB DAPP from 2010 to autumn 2014 and the GB SPP from autumn 2014 onwards.



Source: Defra Agricultural Price Index of agricultural outputs in the UK

Farmgate prices for Scottish prime cattle and prime sheep remained relatively stable for a decade from 2010, before beginning an upward trend from 2020 onwards. Pig prices at Great Britain (GB) reporting abattoirs have shown a similar pattern, with a disruption in 2021 when a backlog of pigs on farms placed significant downward pressure on pig prices.

Compared to 2019, average prices in 2024 rose by 45.6% for Scottish prime cattle, 69.4% for Scottish prime sheep, and 41.3% for GB standard pigs.

Similarly, the Defra output price index also indicated fast price increases for cattle, sheep and pigs from 2019 to 2024. In comparison, poultry prices rose by a more modest 9% during the same period, reaching a peak in 2023 after a surge in input costs, before falling sharply in 2024.



Cattle

Following a previous surge, prime cattle prices in Scotland continued to rise by 3.8% in 2024, averaging above the £5 threshold at 506.4p/kg. The real-term after inflation adjustments¹ edged up, marking the second-highest level in the past 15 years, surpassed only by the figures seen in 2013.

In England and Wales, average prime cattle prices saw a slightly stronger increase of 4.7%, leading to a smaller Scottish premium of 11.7p/kg, or +2.4% in 2024. While this price gap exceeded the low of 2022, it remained below the five-year average.

Farm Assurance Premium in 2024

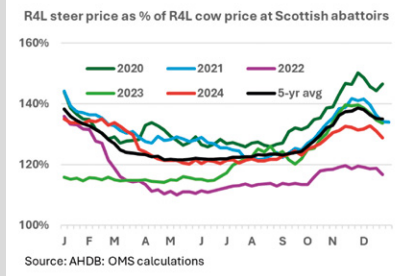
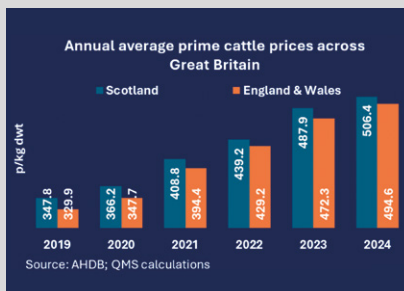
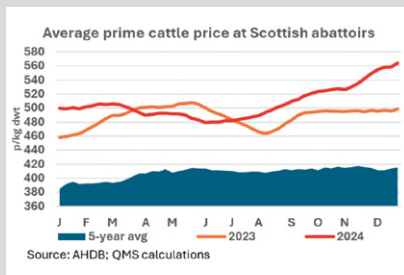
14.4% (16.3% in 2023)
35.8p/kg lwt (39.2p/kg in 2023)

Source: IAAS; QMS calculations

Note: pricing premium for sales assured prime cattle over non-assured prime cattle at Scottish auctions.

Meanwhile, cull cow prices averaged at 381.1p/kg in 2024, indicating a 1% rise compared to 2023. When compared to steer prices, cow prices generally followed the long-term seasonal trend throughout 2025. Cow prices proved relatively strong in the first quarter but soft in the final quarter of 2024.

Prices for finished prime cattle



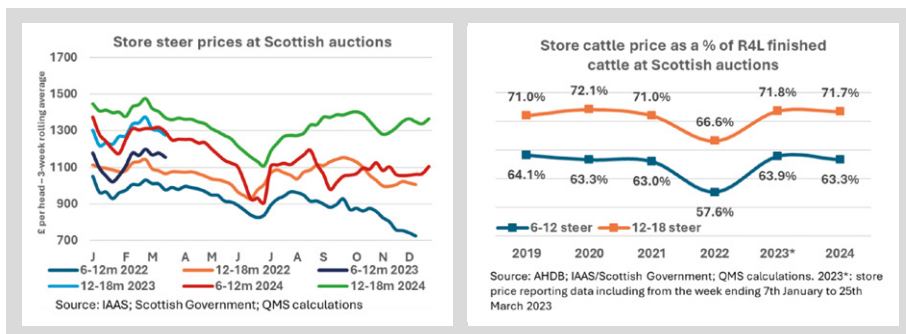
1. Real prices: Where inflation is greater than zero, the price that the producer receives is lower in real terms than the market (nominal) price. This is because the sales proceeds have less purchasing power in the wider economy due to the rise in the general level of prices. For example, a sales price of 500p/kg in period 2 would be equivalent to a price of 490.2p/kg in period 1 if the rate of inflation between the two periods was 2%, and 480.8p/kg with inflation at 4%. The inflation rate used is the CPIH – a measure of retail price inflation published and favoured by the ONS.

Price comparison for most common grades at Scottish abattoirs in 2024

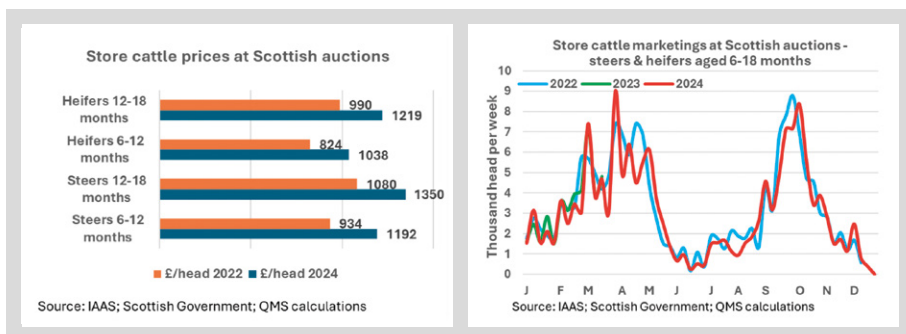
Grade	% of carcasses in category	p/kg	£ per carcasse	Change on year	
				p/kg	£ per carcasse
R4L Steer	27.1%	511.3	1,883	+3.9%	+4.9%
R4L Heifers	33.5%	513.0	1,709	+4.4%	+5.0%
R3 Young Bull	23.8%	489.1	1,749	+2.8%	+4.6%
R4L Cow	12.7%	404.8	1,603	-0.5%	-0.4%

Source: AHDB; QMS calculations

Store cattle



A strong demand from finishers pushed store cattle prices higher in 2024, with the average steer prices for 6-12 months rising by 27.5% and 12-18 months increasing by 25% compared to 2022². While volumes lagged 4.9% behind 2022 levels, prices followed seasonal trends.



2. Store price reporting data for 2023 only covers the period from January to March and is therefore insufficient for a comparison with 2024. As a result, data from 2022 has been used for comparative purposes.

Sheep

Prime sheep prices³ surged by 22.5% at Scottish auctions in 2024, recording a historical high with an average of 316.06p/kg liveweight. Prices peaked above £4/kg in May and remained well above the five-year average throughout the year. After adjusting for inflation, the real-term value rebounded, reversing the previous two-year decline. It surpassed the peak level observed in 2021, reaching a new high in the past fifteen years⁴.

At price-reporting abattoirs in GB, lamb prices also averaged 19.9% higher than in 2023, at 690p/kg deadweight.

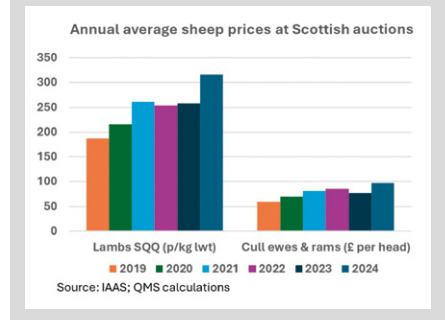
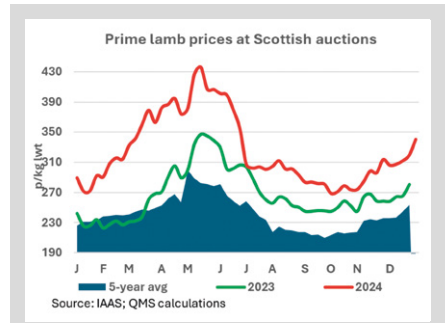
In the meantime, the average selling price for cull ewes and rams rebounded sharply by 25.3% at Scottish auctions, averaging £96.73 per head.

Farm Assurance Premium in 2024

5.6% (4.5% in 2023)
16.7p/kg lwt (11.1p/kg in 2023)

Source: IAAS; QMS calculations

Note: pricing premium for sales assured prime sheep at Scottish auctions.



Notes: Farm Assurance Premium at Scottish Auctions

Prices paid at Scottish auctions for finished farm assured cattle and sheep are based on realised selling prices. The true premium cannot be observed because it is the difference between the price paid for an animal and the price which would have been paid for the animal had its assurance status been the opposite.

Only 3% of the prime cattle and 8% of the prime sheep sold at Scottish auctions in 2024 were non-assured, resulting in small sample sizes – particularly for cattle, with overall auction volumes equating to only 4% of annual prime cattle slaughter.

3. Annual average prime sheep prices are based on the old season price from January to April and then the new season lamb price from the beginning of May and are based on the Standard Quality Quotation which is lambs weighing 25.5-45.5kg liveweight at auction sales and 12-21.5kg deadweight at GB abattoirs.

4. No store lamb prices were available in 2023.

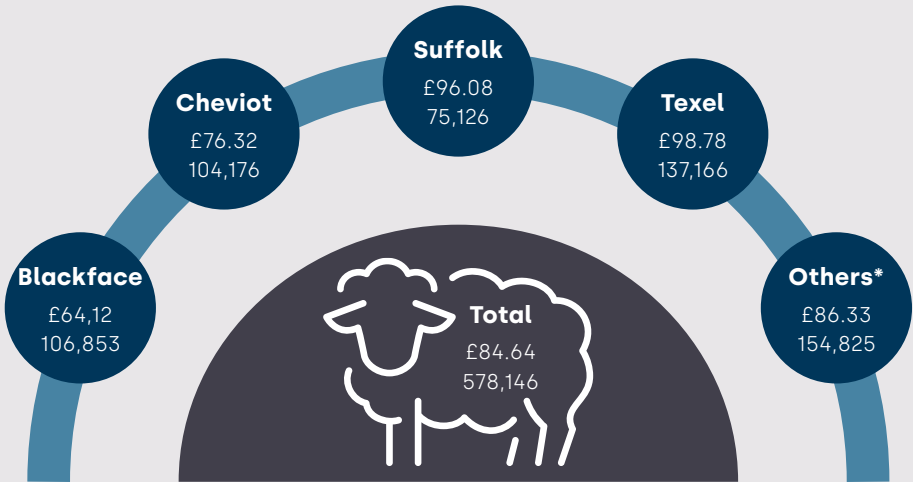
In 2024, store lamb prices at Scottish auctions rose by 23% compared to 2022⁵ and were 16.3% above 2021, which was seen as a strong year for the store market, despite a slight rise in the number of store lambs sold in 2024.

Prices of Blackface store lambs increased by 19.3% compared to the

2020-22 average level at Scottish auctions, possibly due to a supply shortage.

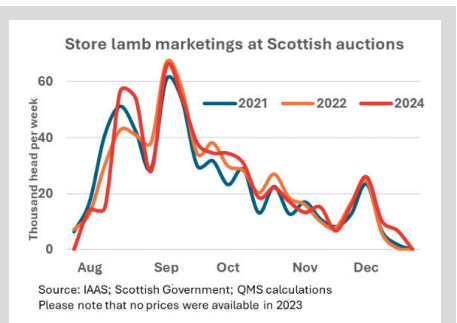
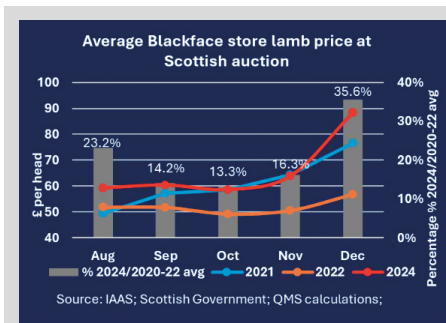
In 2024, Texel store lambs remained the most commonly sold breed at Scottish auctions, representing nearly 24% of the overall supply. In comparison, the Blackface store lambs consisted of 18.5% of the total supply.

Store sheep



Source: IAAS/Scottish Government; QMS calculations

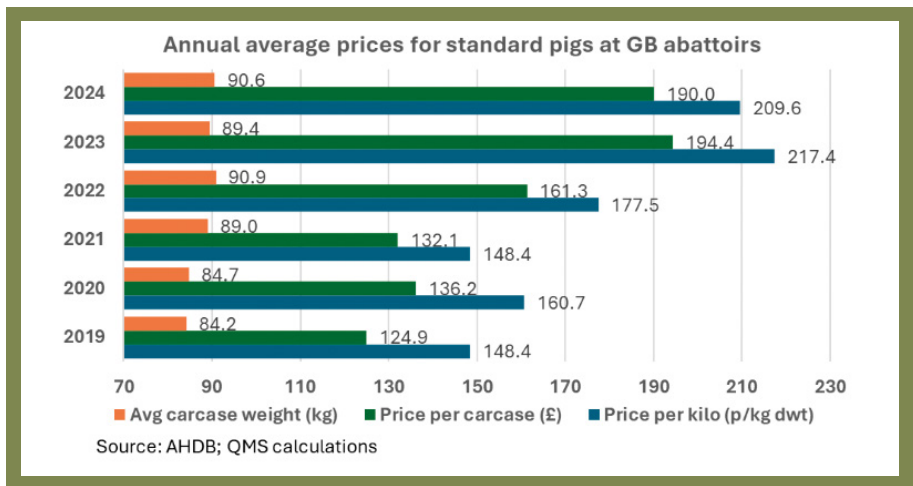
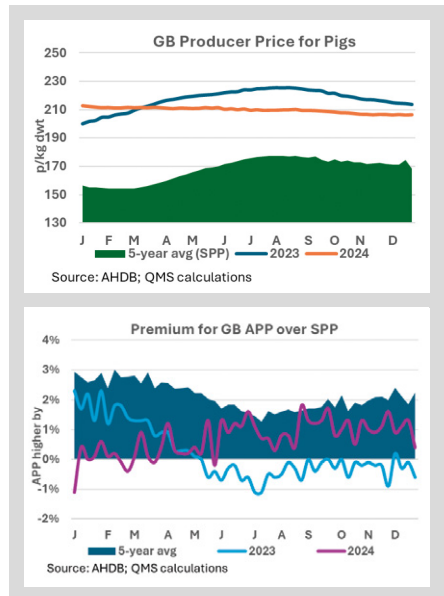
*Includes Greyface/mule, Suffolk X, Texel X, Beltex, Charollais, other continental, other pure breeds, other crosses and unspecified breed.



5. No store lamb prices were available in 2023.

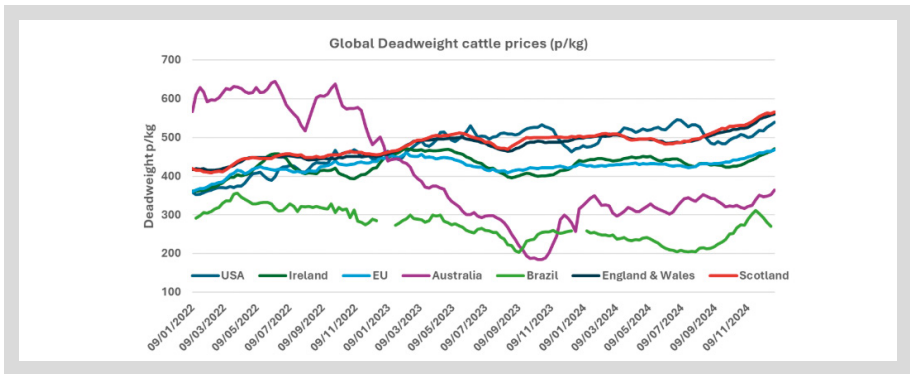
Pigs

Pig prices at GB reporting abattoirs (SPP)⁶ gradually declined throughout 2024, although they remained significantly above the five-year average. Prices fell by 3.6% to 209.6p/kg in 2024. In real terms, after adjusting for inflation, they decreased from the decade-high, although remained considerably higher than in the years 2015-22. The All Pig Price (APP) declined as well, though by a slightly smaller 3.1% to 211.1p/kg. Therefore, the premium for APP over the SPP saw an increase to an average of 0.7% in 2024. This indicates that pigs with specific production characteristics were receiving slightly higher premiums than in the previous year. This trend was evident throughout the year, especially in the second half, although it should be noted that the price reporting samples are different from each other.



6. The 'Standard Pig Price' (SPP) is the price paid by a sample of abattoirs across Great Britain for a 'standard pig'. A standard pig is one that does not receive a premium based on a specific characteristic, such as its breed or being farmed organically. Bonus payments for meeting specific contract targets are also excluded. The only premia included are, therefore, those based on weight and carcass grade.

Global Deadweight Cattle Prices in 2024



Farmgate cattle prices vary across the world, influenced by differences in supply and demand. The prices selected for comparison are representative of each country's market conditions.

Scottish deadweight cattle prices have consistently held a premium position in global markets, reflecting Scotland's reputation for high-quality beef. This premium position enhances Scotland's appeal in high-value export markets, though it may present challenges in competing on price in more cost-sensitive regions.

Sources:

- USA cattle prices, dressed WtdAvgSteer, 5 Area Del – USDA <https://www.ers.usda.gov/data-products/livestock-and-meat-domestic-data/>
- Brazilian cattle prices, Steers SP <https://www.pecuaria.com.br/cotacoes.php#quadro>
- EU cattle prices, Adult Male Indicative Price – European Commission <https://www.agridata.ec.europa.eu/>
- Australian cattle prices, Eastern States Young Cattle Indicator – MLA <https://www.mla.com.au>
- Irish cattle prices, Steers R3 – LMC <https://www.lmci.com/>
- R4L steers cattle prices in Scotland and England & Wales – AHDB <https://ahdb.org.uk/markets-and-prices>
- QMS calculations
- Exchange rates – Bank of England, European Central Bank and Federal Reserve

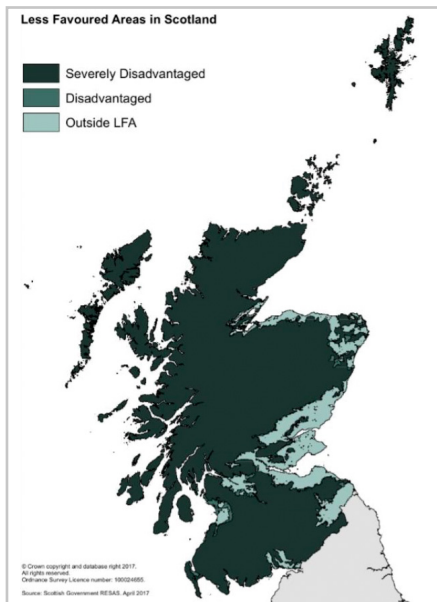
Livestock Production

The June Agricultural Census results continue to highlight the importance of livestock farming in Scottish agriculture. In June 2024, 79.6% of the country's agricultural area was grass and grazing land, while 94% of holdings had an area of grass or grazing land.

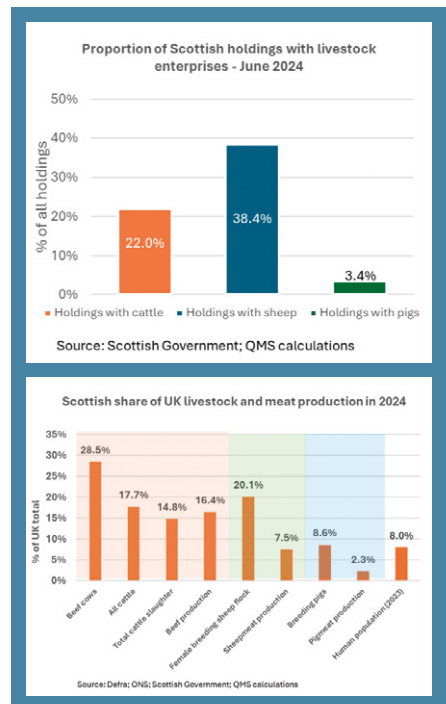
Of the 45,453 holdings⁷ reported in 2024, 42% allocated a main farm type classed as either Less Favoured Areas (LFA) or non-LFA cattle and sheep⁸, 8% were mixed, and another 34% were 'general cropping; forage'. The main farm type on 0.8% of holdings was

'specialist pigs'. Sheep were found on 38% of Scottish holdings in June 2024, just over one fifth had cattle and 3.4% had pigs. Meanwhile, 17% of holdings had beef cows, 32% had ewes and 1.2% had sows.

Cattle and sheep production is heavily concentrated in disadvantaged areas of Scotland, with June Agricultural Census data from 2024 showing that 78.8% of Scotland's beef cows and 89.5% of the ewe flock were in LFA. While dairy production and cattle finishing are less likely to take place in disadvantaged areas of the country, a significant majority of the dairy cows (68.9%) and male cattle over a year old (57.7%) were found in these areas in June 2024. By contrast, only 21.8% of female breeding pigs and 17.6% of non-breeding pigs were in disadvantaged areas.



Scotland tends to specialise more in livestock production than in abattoir production, resulting in a significant net outflow of cattle, sheep and pigs for processing in England and Wales. This may reflect large population centres in England, providing meat consumers and an abattoir workforce. Compared to the rest of the UK where dairy production dominates and beef tends to be a by-product of dairy, Scotland specialises in beef production, with around two-thirds of the cow herd being beef breeds.



- The number of holdings was revised down from above 50,000 due to a methodological change in 2023 which is now excluding any holding which has failed to report census results or submitted a Single Application Form to claim agricultural support payments in the past ten years.
- LFA refers to 'Less Favoured Areas', which are areas of land deemed to be disadvantaged due to low levels of productive potential and/or a low human population in the area which is largely reliant on agriculture.

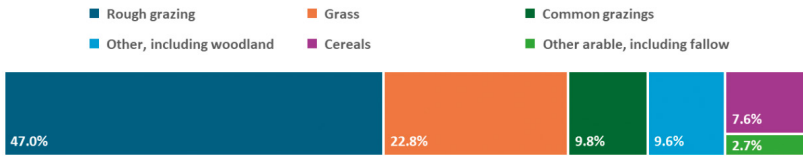
As a result, Scotland accounts for nearly 30% of the UK's beef cow population, well above its share of the total cow breeding herd. Set against an 8% share of the UK human population, Scotland over-indexes in breeding cattle, sheep and pigs, and abattoir production of beef, but under-indexes on lamb and pork production.

The cattle population in Scotland has seen a steady decline since the late 1990s. Although the Foot and Mouth Disease (FMD) outbreak of 2001 did result in some volatility, the trend resumed after the Common Agricultural Policy (CAP) reform in the mid-2000s which resulted in a shift away from a support system based on animal numbers towards one based on the

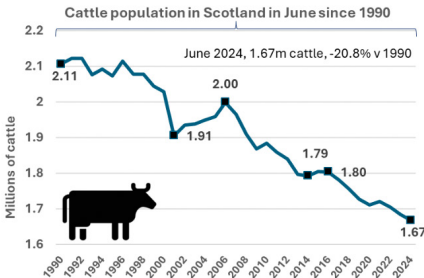
area farmed. The pace of decline accelerated in 2023, driven by higher input costs and the attractive cow cull prices available in 2022, and remained at a high rate in 2024 despite more favourable market conditions.

As of June 2024, Scotland's sheep population remained below the 1990 level by over one-third (-34.9%). However, unlike the steady decline in cattle, nearly all the decline in sheep took place between 1999 and 2010, driven firstly by FMD outbreak and then by the CAP reform. Although the population proved more stable in the 2010s and early-2020s, supported by firm market conditions and rising productivity, difficult lambing seasons in 2023 and 2024 led to further declines.

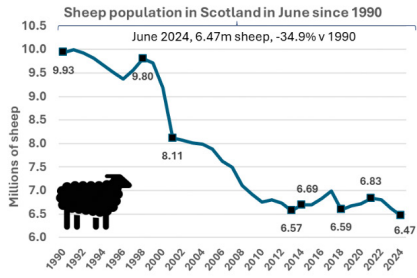
Scottish land use by type - June 2024



Source: Scottish Government; QMS calculations



Source: Scottish Government; QMS calculations



Source: Scottish Government; QMS calculations

Scottish Livestock Greenhouse Gas Emissions

In Scotland, Greenhouse Gas emissions totalled at 39.6MtCO₂e in 2023, 51% below the 1990 baseline⁹. Transport was the main source of emissions, with nearly 29% of the total, followed by agriculture, business and residential. Although the Scottish agriculture sector has reduced emissions by 13% compared to 1990, equivalent to 1.12MtCO₂e, its share of emissions has risen from under 11% of the total in 1990 to 19% in 2023 due to significant reductions in other parts of

the economy, particularly energy supply, driven by the shift away from coal towards renewables.

Land use, land use change and forestry has also seen a substantial decline in emissions since 1990. Within this category, forestry and grassland act as carbon sinks, subtracting emissions from the category total and offsetting emissions from cropland and peatland.



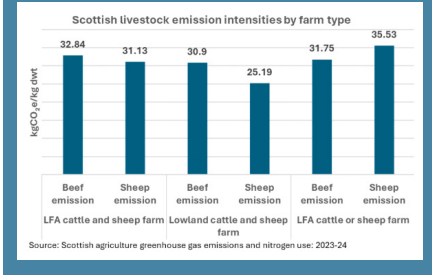
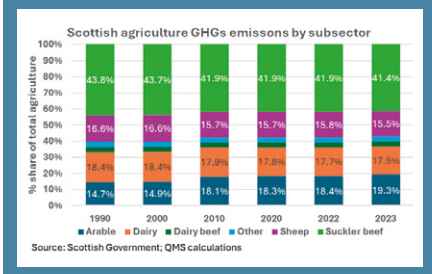
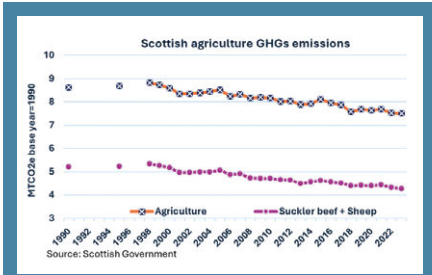
The Scottish red meat industry has already made progress in reducing its environmental impact, with many farmers adopting sustainable practices and investing in new technologies.

Suckler beef and sheep farming reduced its GHG emissions by 18% between 1990 and 2023¹⁰, heavily influenced by a reduction in stock numbers. Suckler beef farming has

historically been the largest contributor to GHG emissions within the agricultural sector, at 41.4% in 2023, although its share has been decreasing since 1990. Similarly, the sheep sector, which is the fourth largest contributor to agricultural emissions, has also seen a decline in its share. In contrast, the arable sector has experienced significant growth in its share of emissions.

9. Scottish Greenhouse Gas Statistics 2023; QMS calculations.

10. Scottish agriculture greenhouse gas emissions and nitrogen use 2023-24; QMS calculations



Across the Scottish livestock farm types included in the Farm Business Survey, average beef emission intensity¹¹ ranged from 30.9 to 32.8kgCO₂e/kg dwt in 2023-24, depending on farm type. Lowland cattle and sheep farms recorded the lowest levels, likely reflecting higher productivity linked to climate and land capability.

The 2022 Cattle and Sheep Enterprise Profitability in Scotland report found that higher levels of animal efficiency and productivity generally resulted in lower emissions intensity, a trend that was consistent over time¹².

However, environmental sustainability is about more than carbon emissions. Well-managed, sustainable livestock systems can have a positive impact on biodiversity, flora and fauna, and exert a significant and positive influence over the appearance of landscapes and their suitability as habitats for key species. Healthy soils developed by mixed farming systems are abundant in nutrients, organic matter and invertebrate life which promote thousands of vital farmland species.



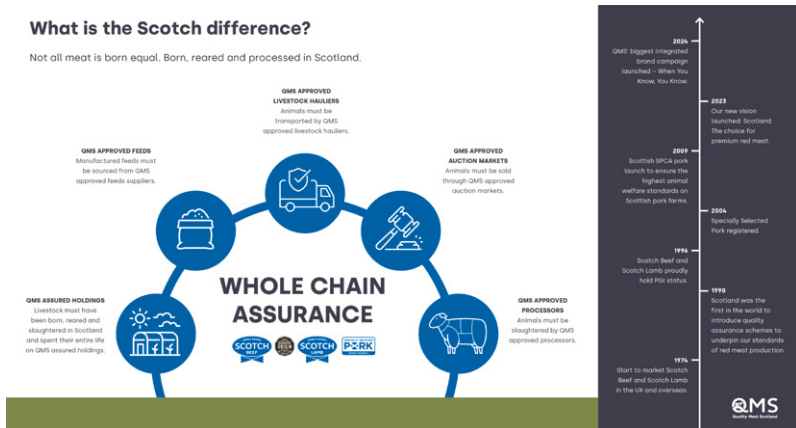
11. Scottish agriculture greenhouse gas emissions and nitrogen use: 2023-24. Average emission intensity measures the carbon footprint of a specific product from an activity or enterprise on a farm. For example, the average amount of GHG emitted in the process of producing a tonne of wheat, or a kilogram of beef.

12. Cattle and Sheep Enterprise Profitability in Scotland, commissioned by Quality Meat Scotland (QMS); Estimates were made of the greenhouse gas emissions associated with the surveyed enterprises, based on net liveweight produced or added during the calf and lamb crop year.

Scotch Difference

To carry the Scottish red meat industry's three premium brands – Scotch Beef PGI, Scotch Lamb PGI and Specially Selected Pork – livestock must have been born, reared and slaughtered in Scotland and spent their entire lives on QMS Assured holdings.

This whole chain assurance underpins the integrity of these premium brands and provides reassurance to consumers of provenance, highest standards of production, animal welfare and wellbeing, to deliver a quality eating experience.



Sales data from finished livestock at Scottish auctions showcases the high level of coverage of the assurance schemes in Scotland.

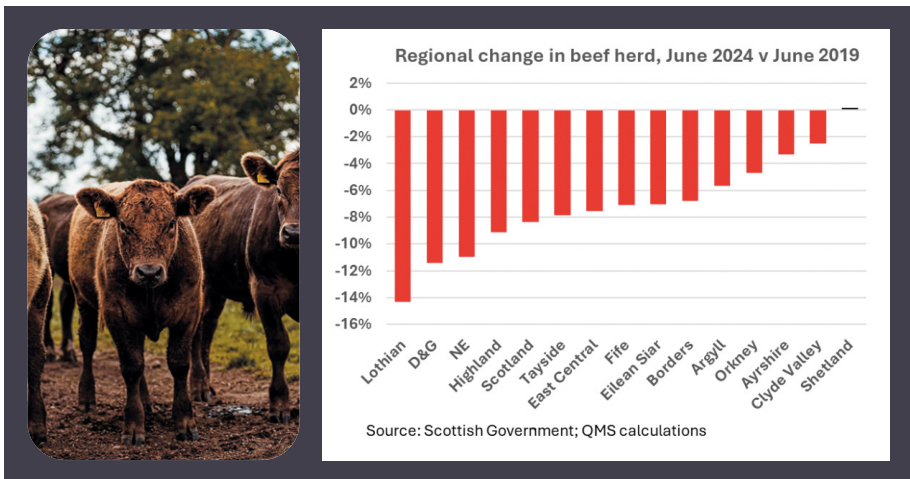
Sales of assured and non-assured stock at finished auction sales in Scotland, 2024				
Category	Total Sales	Assured	Non-assured	% assured
Prime cattle	14,776	14,305	471	96.8%
Cows	33,773	31,927	1,846	94.5%
Adult bulls	2,696	2,459	237	91.2%
All cattle	51,245	48,691	2,554	95.0%
Prime lambs and hogs	907,339	835,434	71,905	92.1%
Cull ewes	298,012	254,862	43,150	85.5%
All sheep	1,205,351	1,090,296	115,055	90.5%

Source: IAAS; QMS calculations

Note – based on sales data from 51 of 52 weeks with data for w/e 04/05/24 unavailable

Cattle Production – National and Regional

While Scotland's beef herd has been contracting for two decades, 2024 was the third consecutive year of significant reduction in beef cows. Following declines of 3.3% in December 2022 and 2.5% in December 2023, there was a 3.6% reduction in the year to December 2024. In June 2024, beef cow numbers were 22.7% lower than in June 2006, when the Cattle Tracing Scheme began. Research conducted by QMS in summer and autumn 2024 found that concerns over a lack of profitability, challenges with the cost and availability of labour and issues linked to an ageing population of farmers, such as health concerns, work-life balance and lack of succession planning, are likely to have been factors in the decline.



By contrast, Scotland's dairy cow population expanded for a second successive year and reached a 17-year high in 2024, ending the year 1.9% higher than December 2023.

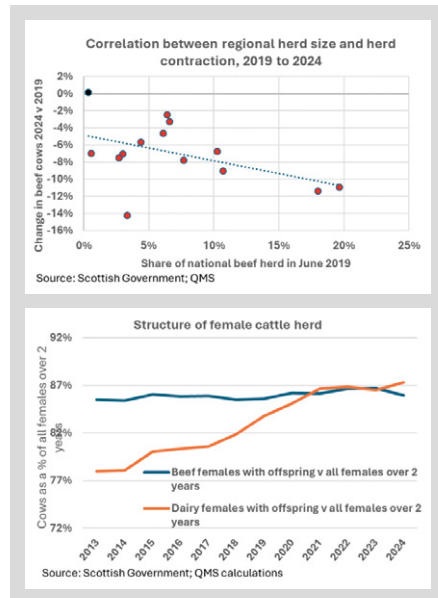
The fast rate of decline in the suckler herd meant that the total share of cows that were beef cows fell further in 2024. In December, the beef share of the total breeding herd fell by another 1.2 percentage points to 66.8%. This share was three percentage points lower than in 2019 and four points lower than in 2014.

Based on data from June 2024, three of the four largest regional herd contractions in proportionate terms have taken place in areas with the largest beef herds. Compared with the national reduction of 8.3% in beef cows between 2019 and 2024, the Highlands (-9.1%), the North East (-11.0%) and Dumfries and Galloway (-11.4%) all saw larger reductions, along with Lothian. Shetland recorded a marginal increase, while the smallest declines of around 3% were in Clyde Valley and Ayrshire.

Structural change within the dairy sector may account for some of the significant upturn in the calves to cows ratio in recent years. Dips in 2013 and 2018 reflected challenging spring weather conditions, which raised mortality rates. The ratio has proved more stable since 2021, suggesting that the period of structural change in the dairy herd has come to an end. Interestingly, the number of females over two years old with offspring relative to the total female population over two years old, rose significantly in the dairy herd in the late 2010's and early 2020's while being relatively stable in the beef herd.

With livestock production heavily influenced by land type, the cattle population is skewed towards producing beef calves in Scotland's island and upland areas. Meanwhile, dairy production is common in the South West, with Fife, Lothian and the North East geared towards cattle finishing.

Highlighting the flow of store cattle into Aberdeenshire for finishing, the North East had 31.3% of Scotland's male cattle between one and two years of age in June 2024 but only 19% of the beef cows and 13.8% of all cows.



SCOTTISH COW NUMBERS IN DECEMBER 2024

All cows 540,255 head



Beef cows

360,873 head

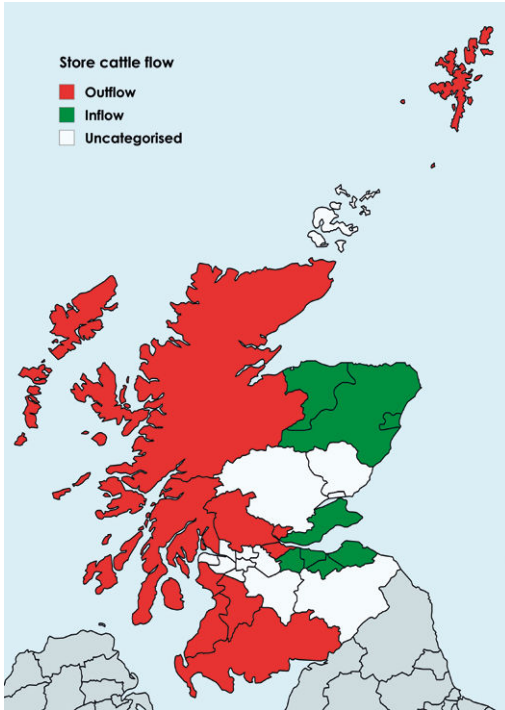
66.8% of all cows



Dairy cows

179,382 head

33.2% of all cows



Store Cattle Inflow and Outflow in Scotland

Note: this map was created to demonstrate store cattle movements in Scotland. When the percentage out of the national total for all cows in a region is greater than that of male cattle aged 1-2 years, it indicates a store cattle outflow. Otherwise, it indicates a store cattle inflow. As to the Borders, Tayside, Orkney and Clyde Valley, the percentage differences are too small to be categorised (the percentage share of males is less than 1.1 times the percentage share of cows). In the South West, the figures will be affected by the dairy sector.

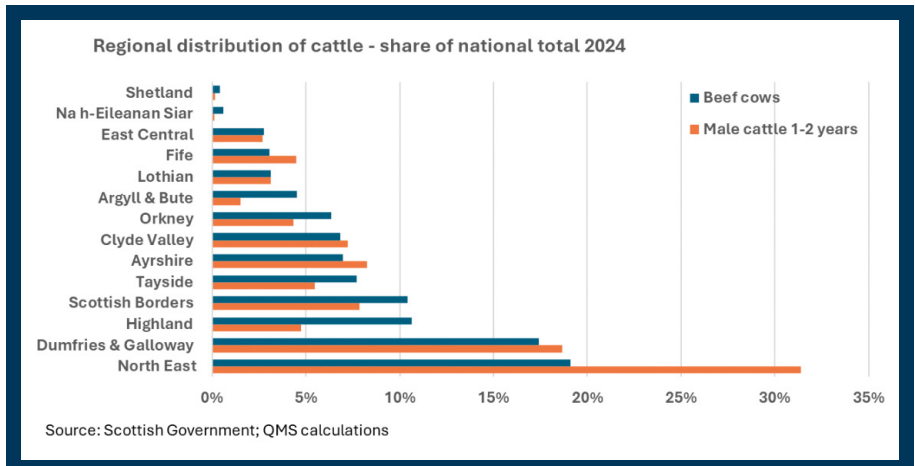
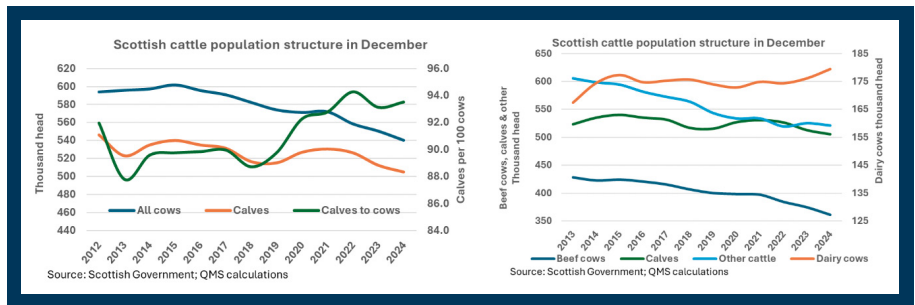
Source: Scottish Agricultural Census, June 2024
 QMS calculations, created with mapchart.net

Scottish cattle population structure in December 2024 – thousand head							
	2022	2023	2024	y/y change	Change since Dec 2019	Seasonal change since June 2024	Avg June to Dec seasonal change 2019-23
Female beef cattle over 2 years with offspring	384.2	374.4	360.9	-3.6%	-9.8%	-5.7%	-4.6%
Female dairy cattle over 2 years with offspring	174.3	176.1	179.4	+1.9%	+3.2%	-0.1%	-0.2%

Scottish cattle population structure in December 2024 – thousand head

	2022	2023	2024	y/y change	Change since Dec 2019	Seasonal change since June 2024	Avg June to Dec seasonal change 2019-23
Males over 12 months plus females over 24 months without offspring	279.4	282.2	279.7	-0.9%	-9.3%	-17.7%	-15.8%
Calves	526.4	512.6	505.1	-1.5%	-2.0%	-1.1%	-1.1%

Source: Scottish Government; QMS calculations

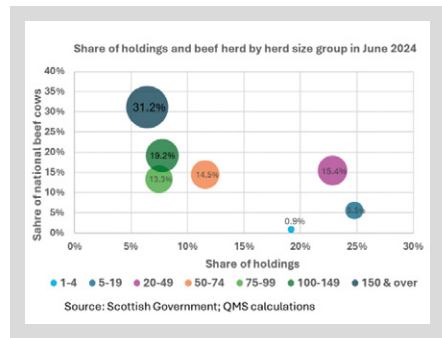
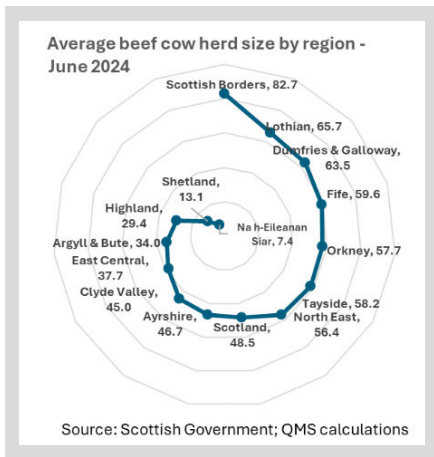


Herd Size

The average number of beef cows on Scottish holdings was 48.5 in the regional census data from June 2024.

Average herd sizes vary considerably across the country, with the Borders averaging 82.7 more than 11 times higher than the average in Na h-Eileanan Siar (7.4).

Although the national average beef herd size was 48.5 in June 2024, the distribution is skewed towards larger herds. 78% of the national beef herd were on holdings with at least 50 cows and just over half of the herd were on holdings with at least 100 beef cows. Therefore, the median herd size is more than double the mean.



Calf Registrations

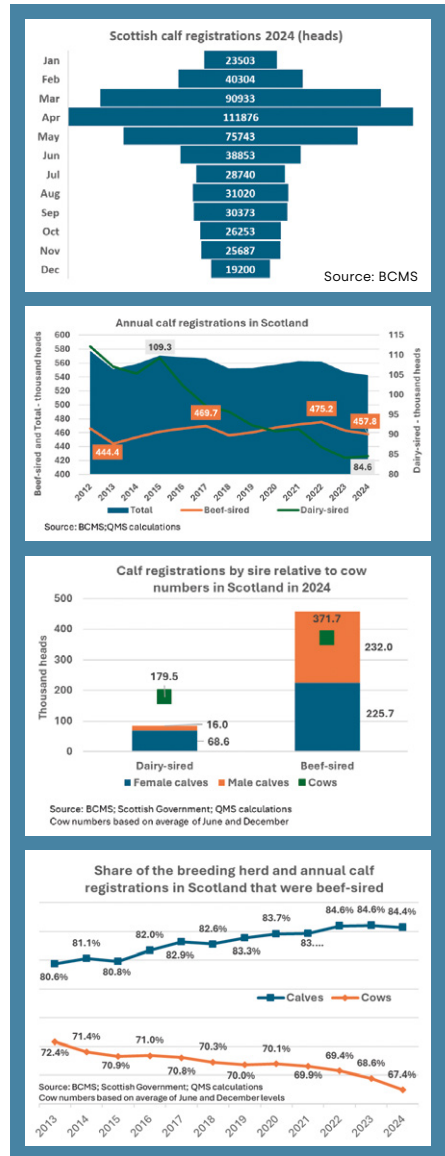
After calf registrations fell by 2.7% in Scotland in 2023, a smaller cow herd meant that the decline continued in 2024, down by 0.8% to 542,500.

Seasonality in calvings reflects the predominance of spring calving in the beef herd, with an increased 56.6% of beef registrations taking place between March and May in 2024 compared with 23.1% of dairy registrations. Overall, 51.3% of calves were registered during the spring.

After steady increases between 2014-2022, beef-sired registrations decreased for a second year in 2024, slipping by an above-average 1.1% and slumping to a six-year low of 457,900 head¹³. However, this decline was much smaller than the reduction in beef cows.

Meanwhile, dairy-sired registrations increased by 0.5% to 84,600. This was the first rise since 2021 and only the second since 2013, although this undershot the rate of increase in dairy cows.

These figures highlight the structural shift in cattle production in Scotland in recent years, with dairy producers making greater use of sexed semen for female replacements and beef genetics to produce higher quality male calves.



13. Beef-sired registrations are all non-dairy registrations and include a small number of dual, exotic and rare breeds

Scottish Suckler Beef Support Scheme – Annual Claims 2015-24 relative to calf registrations

Scheme year	No of animals claimed	No of businesses submitting an application	Avg calves claimed per business	Beef-sired registrations	% of beef-sired calf registrations	Total calf registrations	% of total calf registrations
2015	394,449	7335	53.8	460,053	85.7%	568,950	69.3%
2016	394,247	7074	55.7	465,678	84.7%	569,139	69.3%
2017	386,707	6817	56.7	469,438	82.4%	566,458	68.3%
2018	388,302	6937	56.0	475,079	85.0%	553,511	70.2%
2019	378,617	6806	55.6	459,945	82.3%	552,301	68.6%
2020	382,764	6748	56.7	466,562	82.0%	557,710	68.6%
2021	372,508	6503	57.3	470,950	79.1%	562,252	66.3%
2022	379,999	6519	58.3	475,641	79.9%	563,008	67.5%
2023	366,371	6442	56.9	463,213	79.1%	547,499	66.9%
2024	347,546	6129	56.7	457,178	76.0%	541,686	64.2%

Source: Scottish Government; BCMS; QMS calculations

Data from the Scottish Suckler Beef Support Scheme shows that the downwards trend in the number of beef calves a support payment was claimed on since 2015. This is likely to reflect a reduction in eligibility, due to the increase in beef-sired calves being born to dairy cows. However, at the margins, a small portion could reflect business decisions to not claim support payments and it is possible that economic pressures may have contributed to some of the rebound in claims in 2022, which rose by 2% compared to a 0.8% increase in beef-sired calf registrations for the period (December 2021 to November 2022). The downwards trend then returned in 2023 (-3.6%) and accelerated in 2024 (-5.1%) despite a more modest fall in calf registrations (-1%).

In 2026, businesses claiming for 10 or fewer calves are set to be given a derogation from the newly introduced maximum calving interval requirement of 410 days. According to Professor Steven Thomson of SRUC, this is set to cover around 20% of the businesses and 2% of the calves, based on 2023 scheme data.

The recent shift in registrations from North East to South West continued in 2024. While total registrations continued to reduce in both areas, the reduction was only marginal in the South West.

In addition to the change in structure of calf registrations away from dairy sires towards beefsires, there has also been a shift away from continental sires.

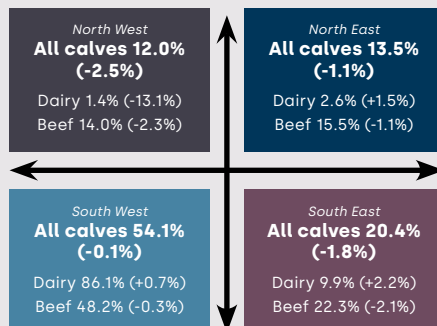
Due to change in the dairy sector, Angus calvings surged in the late 2010's and early 2020's, overtaking Limousin as the most popular breed in 2020 and building further since. Angus registrations edged up in both 2023 and 2024, in contrast to overall declines.

Calf registrations in 2024 for selected native Scottish and British beef breeds

Shorthorn		22,400 4.1% of total
Hereford 14,100 2.6% of total	Luig 7,100 1.3% of total	
Galloway 4,500 0.8% of total	Highland 3,000 0.6% of total	

Source: BCMS; QMS calculations Births rounded to nearest 100

Calf registrations: share of national total & year-on-year change in births in Scotland by region and type in 2024



Source: BCMS; QMS calculations | Note: Year-on-year changes in brackets reflect the change in share

Calf registrations in Scotland by main breed groups

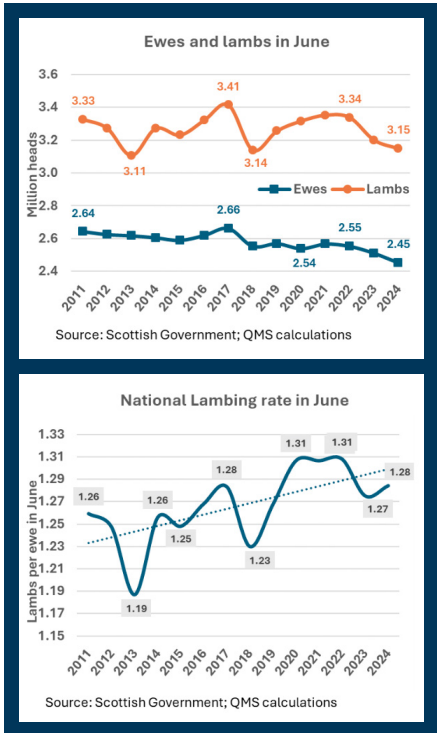
Breed	2022 (% of total)	2023 (% of total)	2024 (% of total)	% change in number of births 2024 v 2023	% change in number of births 2024 v 2015
Angus	24.9%	25.6%	26.0%	+0.8%	+57.1%
Limousin	17.4%	16.6%	15.7%	-6.0%	-32.8%
Black and White with dairy breeds (88% of dairy registrations in 2024)	13.4%	13.4%	13.7%	+1.5%	-25.8%
Charolais	12.1%	11.8%	11.8%	-1.1%	-27.3%
Simmental	10.6%	10.3%	10.0%	-3.1%	-26.9%
Other	21.6%	22.3%	22.7%	+0.8%	+35.2%
Total registrations (head)	562,000	547,100	542,500	-2.7%	-4.1%

Source: BCMS; QMS calculations

Sheep Production

In the June 2024 Agricultural Census, the Scottish ewe flock size was estimated at just over 2.45m head, a decline of 2.3% from just under 2.51m in 2023. After a relatively stable period between 2018 and 2022, two consecutive declines are of concern, although the 2024 reduction may have been linked to elevated mortality due to the challenging weather conditions in the spring of 2024 rather than a reflection of producer confidence.

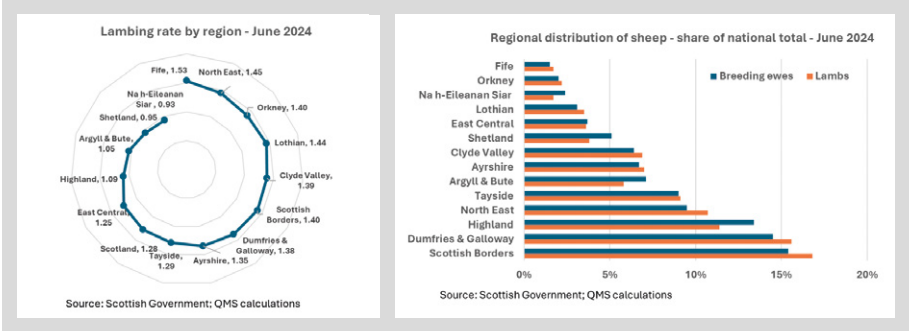
While ewe numbers in June have fallen over the past decade, lamb numbers have shown a more stable underlying trend, driven by increased productivity. However, two consecutive years of difficult lambings in 2023 and 2024 saw productivity fall back from the highs of 2020-22, leaving lamb numbers at their lowest since 2018. Nevertheless, the lambing ratio remained substantially higher than in the previous challenging springs of 2013 and 2018, ensuring that the lamb crop remained above its previous lows. At just under 3.15m head in 2024, the lamb crop was 1.6% smaller than in 2023 and down 5.6% on the 2020-22 average. At 1.28 lambs per ewe, the lambing rate in 2024 held above the 1.25 average level from the 2010s, with only the 2017 rate proving higher.



Regional Variation in Sheep Production

Sheep production continued to be spread slightly more evenly across Scotland than cattle in June 2024. Above-average lambing percentages meant that the Borders, Dumfries and Galloway and the North East took higher shares of the national lamb crop than the ewe flock, whereas the opposite was true for the Highlands.

Regional variation in lambing performance is generally reflective of land and climate, but also farming structure, with performance tending to be weaker in areas of the country with a higher proportion of remote upland grazing.

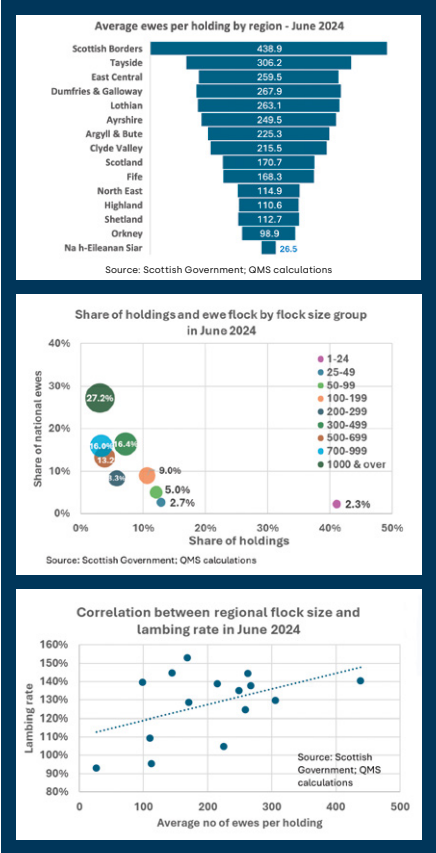


Flock Size

There was an average of 170.7 ewes on each holding with breeding ewes in Scotland in June 2024, marking a significant reduction from 176 in June 2023. While this primarily reflected a contraction of the ewe flock, there was a marginal increase in holdings with ewes, most notably in the Highlands, where flock sizes are well below average.

Lambing performance and flock size do not correlate perfectly in Scotland, with Fife, the North East and Orkney all below average for flock size in 2024, having been ranked in the top three for lambing rate. This may reflect that sheep enterprises may tend to be a smaller part of a mixed farming business in areas like Fife and the North East, while tending to be specialist large hill or upland flocks in areas such as the Borders and Perthshire (within the Tayside region).

Holdings with above-average flock sizes accounted for more than 80% of the national ewe flock in 2024, with 81% of the ewes on holdings with at least 200 ewes and 43% of the flock on holdings with at least 700 ewes (just 6.4% of holdings).



Pig Production

Scotland's female pig breeding herd numbers tend to be volatile from year-to-year both in the June and (the now discontinued) December census, with annual changes averaging around 11% in December and more than 6% in June reports in the decade preceding their last publication in 2020 and 2024, respectively.

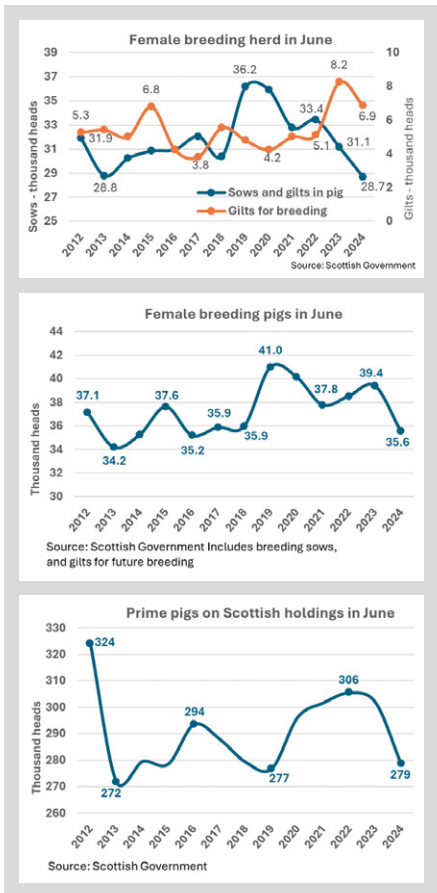
In June 2024, at 28,688 head, the female breeding herd had contracted by almost 8% from 2023, slipping below the previous low recorded in 2013.

Meanwhile, the number of gilts retained for future breeding fell from the high reached in 2023, down nearly 17%. However, this was still well above the average for the previous decade, signalling producer confidence. Nevertheless, after combining the sow herd and gilts for future breeding, the total number of female breeding pigs fell sharply in 2024, slipping back 10% to an eight-year low.

For comparison, England's June census pointed to a small decline in the sow herd but, by the December census, this had turned into a significant expansion, with the sow herd up 8% on December 2023 and gilts by 22%.

For prime pig numbers, the June 2024 census results showed an almost 8% decline from the year before, with numbers slumping to a five-year low and falling further from the peak reached in 2023 (-9%).

ScotEID deaths data points to a different picture in recent years, with the number of pigs moving from Scottish farms to abattoirs in Scotland and England increasing strongly in 2021 before dipping in 2022 and



falling back more strongly in 2023. After rebounding in 2024, slaughter was back similar to 2020 levels. This pattern fits well with market conditions in the pig sector.

In a signal of rising productivity over time, the number of prime pigs on farm remained at 9.7 times the sow herd level in June 2024, working out at the highest ratio since 2012 and up from around 9.2 in 2021 and 2022.



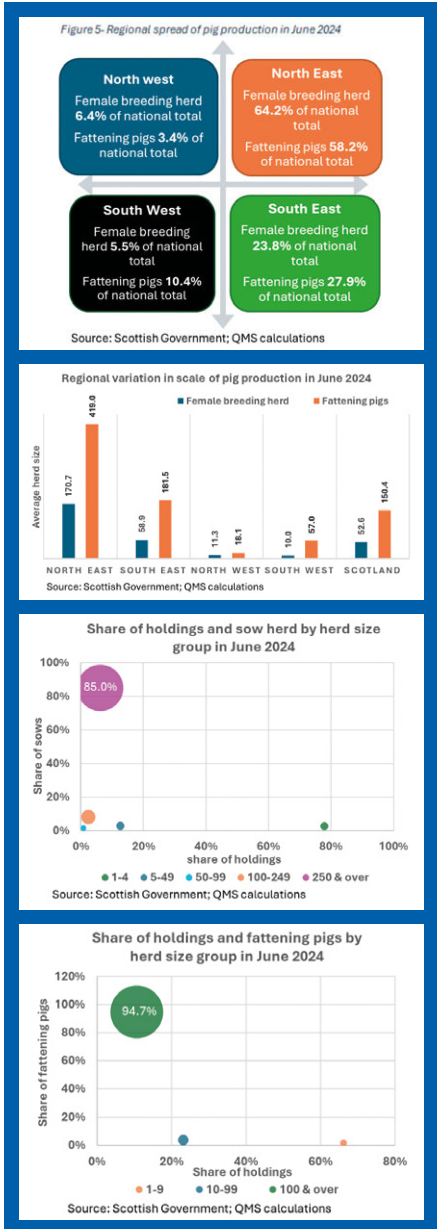
Regional Spread of Pig Production in Scotland

The regional breakdown of the June 2024 census results continued to highlight the heavy concentration of pig production in eastern Scotland, with around 89% of pigs living there. Combining the North East and Tayside would have accounted for 71% of the sow herd and 66% of all other pigs in 2024.

The 2024 regional data pointed to some movement of weaner pigs for fattening from North East to South East, with Fife, Lothian (marginally) and the Borders all having higher shares of non-breeding pigs than of the national sow herd, contrasting with a lower share than for sows in the North East. Clyde Valley also appeared to see an inflow of fattening pigs, though at a low base level, accounting for only around 2% of the national total.

Pig production is heavily concentrated into a relatively small number of herds, with 34 of the 545 holdings with sows in June 2024 having at least 250 of them and being home to 85% of the national herd. These large holdings kept an average of 717 sows, compared with a national average of only 53.

In June 2024, there were 106 Scottish holdings with at least 100 fattening pigs and they accounted for 95% of the national total, averaging 1,331 each. In total, 990 holdings kept fattening pigs.



Farming Output

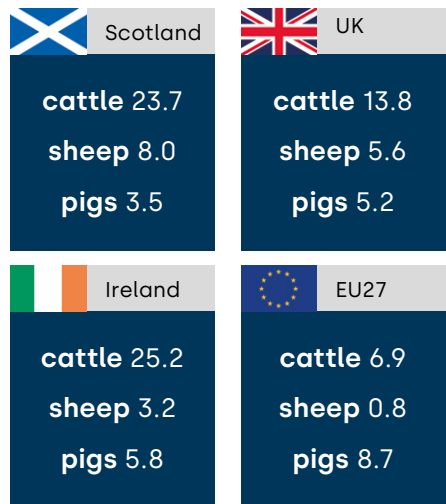
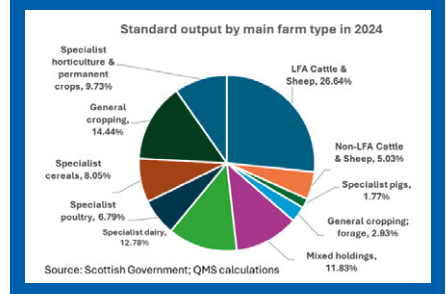
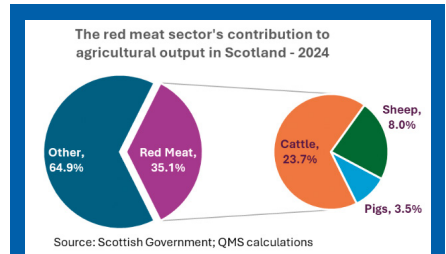
In 2024, the Scottish Government estimates that total agricultural output excluding coupled subsidies dipped marginally to £4.53bn.

Highlighting the importance of the red meat sector to Scottish agriculture, a combined 35% of agricultural output came from cattle, sheep and pig production in 2024. Combined output totalled £1.59bn, led by beef at £1.07bn, with contributions of £363m from sheep and £156m from pigs.

Cattle and sheep continued to be of greater significance to Scottish agriculture than on average across the UK and EU14.

Scottish Government standard outputs for different farm types based on their principal enterprise in 2024 highlight revenues from livestock and arable farming before accounting for input costs¹⁵. These show that cattle and sheep farms generated £820m of revenue and accounted for 31.6% of the total, with another £45.9m and 1.8% of the total from specialist pigs.

On top of this, £306m and 11.8% of revenue came from mixed farms, of which a significant proportion of revenue will have been generated from livestock sales, while the 2.9% of standard output from forage production was generated for use in livestock production.



Source: Eurostat; Scottish Government; QMS calculations

14. EU and Ireland sourced from Eurostat – production value at producer price as a share of output of the agricultural industry. UK sourced from Defra and includes output and capital formation as a share of total output at market prices.

15. The threshold for a farm type allocation is generally two-thirds of output, with mixed farms those where no enterprise type accounts for at least two-thirds of output.

Producer Input Costs

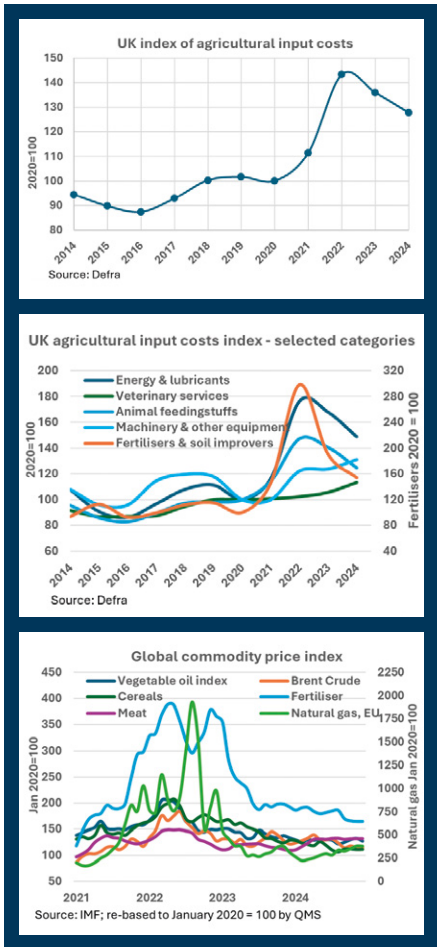
After a surge in 2022, UK agricultural input costs reported by Defra softened in 2023 and fell further in 2024 as many of the commodity price shocks caused by the Covid-19 pandemic and the conflict in Ukraine unwound. In addition, a stronger sterling against the US dollar helped soften the cost of imported inputs which are often priced in dollars. Nevertheless, despite averaging 6% lower than in 2023 and 12% lower than the 2022 peak, the inputs index remained historically high, nearly 30% above pre-Covid levels.

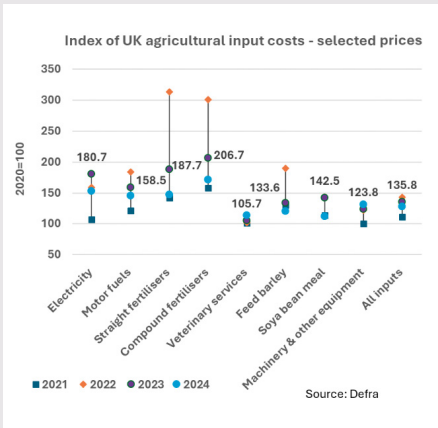
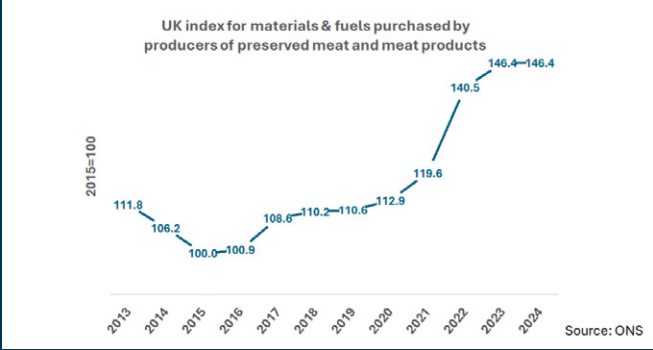
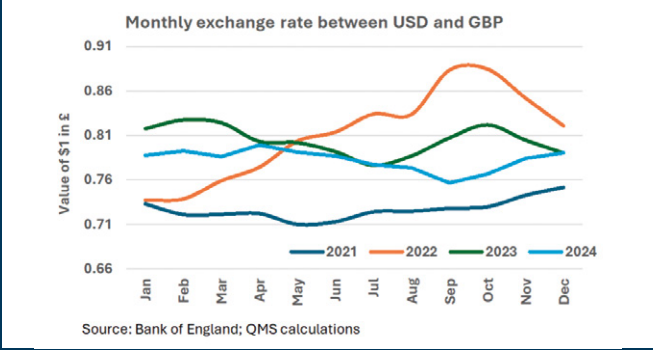
After fertiliser costs doubled in 2022, the sharp reversal seen in 2023 continued in 2024, sliding by a further 19%. Despite this significant drop, fertiliser prices ended the year 30% above the 2019 average and well above the previous peak experienced during the 2008 oil and gas market boom. Additionally, in 2024, energy and fuel costs declined sharper than the previous year, by 11.4%. Similarly, feed costs decreased strongly by 11.3%. This still left them up by 29% and 23% respectively on their 2019 levels at the end of the year.

In contrast to the cost of commodities, costs for machinery, buildings and investments continued to rise in 2024, increasing by 6%, while veterinary services rose by another 7.3%.

The red meat processing sector continued to face elevated production costs in 2024, as although many commodities may have fallen back in price, livestock and labour became more expensive. The Office for National Statistics (ONS) producer price index for

materials and fuels used in the preserved meat and meat products sector stabilised in 2024, but was still 32% higher than in 2019. It should be noted that the ONS is reviewing its producer prices index and there is the potential for input costs to be revised higher following this review.





Supply of Livestock to the Processing Sector

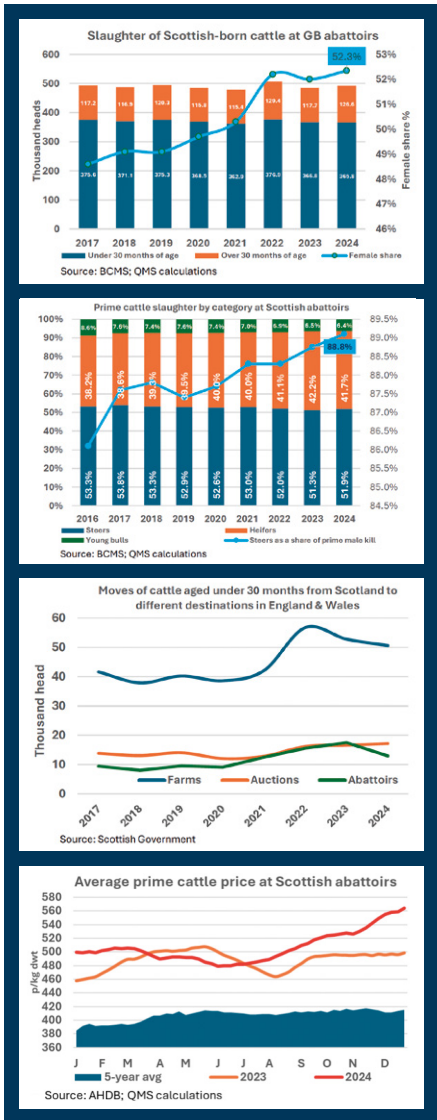
Cattle

After five years of decline, prime cattle slaughter at Scottish abattoirs is estimated to have rebounded marginally in 2024, increasing by 0.3% to 350,400 head.¹⁶

After supply chain rebalancing in 2023, things settled down in 2024, supporting a more stable kill. Slaughter was underpinned by an increased availability of older prime cattle from the higher 2021 and 2022 calf crops, while the significantly smaller calf crop of 2023 had a limited impact given that its decline was strongest in the summer and autumn. For a second year, slaughter was surprisingly weak in November – the traditional peak procurement period for the festive season – with slaughter peaking in October.

Having seen an increased share of the kill for seven consecutive years, the heifer share dipped slightly, remaining elevated. Meanwhile, there was a further rebalancing of the male kill towards steers as the young bull share fell for the ninth time in ten years.

Mature cattle slaughter is estimated to have fallen back further in 2024 from its 2022 peak at Scottish abattoirs slipping to a four-year low.¹⁷ The total fell by an estimated 5.2% to 65,400 head. This included fewer than 900 adult bulls.



16. Annual slaughter based on a 52-week year, ending 29th December 2024. Slaughter has been adjusted by QMS to reflect levy data, with cattle allocated to prime and adult categories in 2023 and 2024 based on the Scottish Government's slaughter survey.
 17. The 2022 record is based on the period since slaughter of over 30 month cattle for the food chain resumed in the mid-2000s, with adult cattle slaughter estimates for 2023 and 2024 adjusted to reflect levy data.

The total number of cattle born in Scotland and slaughtered at below 30 months of age at GB abattoirs fell further from its 2022 high point in 2024. However, the decline was only marginal, at 0.3%. Within this total, the female kill fell 1%, while the number of males processed edged 0.2% higher. Although the female share dipped by 0.3 percentage points to 39.6%, it remained well above 2017-22 levels.

While the number of cattle aged under 30 months leaving Scotland for England and Wales fell in 2024, the number moving remained elevated well above 2017-2021 levels and moves to auctions edged higher again.

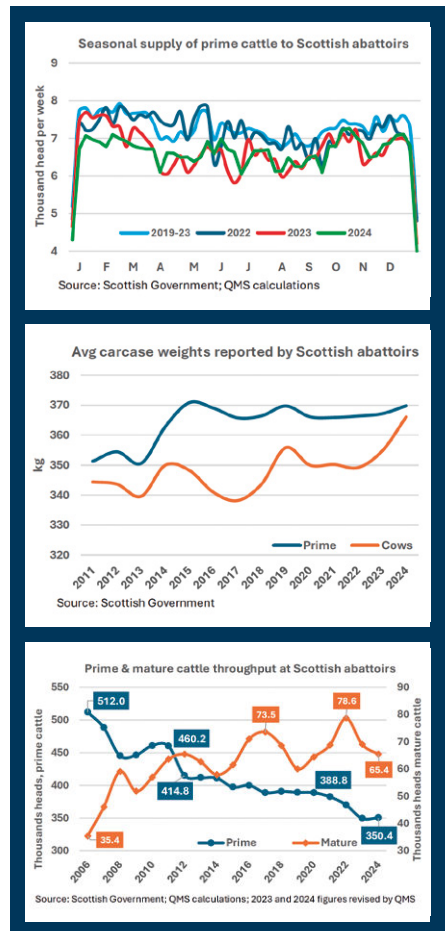
Although slaughter of Scottish-born cattle at over 30 months of age in GB rebounded significantly in 2024, a 7.6% uplift meant that it stayed below the 2022 peak. There was a stronger increase for males (+13.5%) than females (+6.9%), reflecting an increased kill of older steers in 2024. The number of cattle aged over 30 months moving from Scottish farms to English abattoirs jumped by 20% in 2024.

The average prime cattle carcass weight in the Scottish Government's slaughter survey reached a five-year high at Scottish abattoirs in 2024, up by 2.6kg (0.7%) at 369.8kg. This average weight was around 4% higher than if it had been based on the weights reported in the deadweight price reporting sample (356.5kg). Weight increases are likely to reflect the older pool of cattle on farm, which pushed up slaughter ages.

While category carcass weights are well above the UK average in Scotland (4-6% for prime cattle and 16% for cows in 2024) due to the predominance of beef breeds, weights for specific grades are not always higher than at price reporting abattoirs in England and Wales.

In 2024, R3 and R4L grades were only marginally heavier in Scotland.

Carcasses which exceed the target weight range to meet product specifications for prime cuts of beef sold by UK supermarkets often face pricing penalties, particularly at times of the year when supply is stronger relative to demand. This continued to pressure steer carcass weights which, despite rising 3.4kg (0.9%) to a six-year high of 384.8kg in 2024, remained 1.7% below the 2015 peak.



Increased weights in 2024 added to the marginal uplift in throughput, pushing up prime beef output by 1% to an estimated 129,600t. Meanwhile, a surge in weights for mature cattle (+2.9%) limited the decline in cow beef output to -2.4%, with an estimated 24,100t produced.

The net result was a small 0.5% increase in estimated beef production at Scottish abattoirs to 153,700t. However, this was still 17% below the 21st century peak of 185,000t in 2006 and 2007 and 9.5% lower than in 2014.

Average carcass weights					
	Scotland				UK
	2019-23	2022	2023	2024	2024
	kg per head				
Steers	381	380	381	385	368
Heifers	348	349	349	350	331
Young bulls	370	370	375	378	368
All prime cattle	367	366	367	370	353
Cull cows	352	349	355	366	313

Source: Defra; Scottish Government; QMS calculations

Note: UK carcass weights, adjusted to same specification as Scottish weights based on conversion rates when Defra changed reporting method in September 2019 to exclude kidney knob and channel fat (+2.9%).

Carcass weights for selected grades at price reporting abattoirs

Scotland

- Carcass weights
- R4L steers
368.3 (+3.4kg v 2023)
- R4L heifers
333.1 (+2.2kg v 2023)
- R3 young bulls
357.7 (+6.1kg v 2023)
- R4L cows
396.0 (+0.4kg v 2023)

England & Wales

- Carcass weights
- R4L steers
367.9 (+0.5kg v 2023)
- R4L heifers
332.1 (+1.0kg v 2023)
- R3 young bulls
353.4 (-4.3kg v 2023)
- R4L cows
389.0 (+0.8kg v 2023)

Source: AHDB

Note: Weights reported in UK spec for the most common grade in each category at Scottish reporting abattoirs in 2024; an estimated 85% of the prime cattle kill at Scottish abattoirs was deadweight price reported in 2023 and 74% at E&W abattoirs.

Seasonality of Cattle Production

Steers and heifers accounted for 79% of the cattle processed at Scottish abattoirs in 2024, with an annual turn of 83% in March and the lowest in July at 73%. Young bulls accounted for just under 5.5% of the annual kill but exceeded this between May and August, peaking at 13% in July. Cows accounted for 15.5% of the kill, peaking at 18% in November, falling to an annual low of 13% in May.

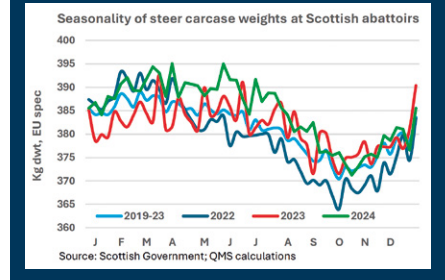
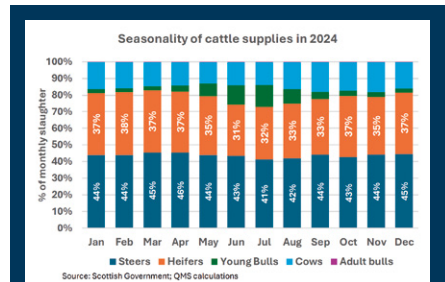
The seasonal pattern in carcass weights at Scottish abattoirs reflects the dominance of spring calving in Scotland's beef herd. In the spring, prime cattle are being slaughtered at around two years turn age compared with around 18 months in the autumn.

Cattle Carcass Quality

To be labelled as Scotch Beef, eligible animals must also meet product specifications. Carcasses must be classified as either 2, 3, 4L, 4H or 5L for fat cover and E, U, R or O+ for conformation.

Based on the proportion grading E, U or R for conformation and 3 or 4L for fat cover, following further increases in 2023, carcass quality for steers and heifers fell slightly at Scottish abattoirs.

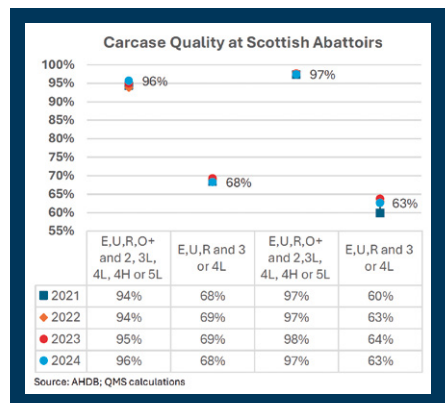
R4L continued to be the most common grade for steers and heifers at Scottish abattoirs in 2024, while R3 remained the most common for young bulls having overtaken the -U3 grade in 2021. Cows continued to have a much more even distribution. Reflecting the dominance of specialist beef production in Scotland, carcasses tend to have higher conformation and fat cover than in England and Wales.



Steer carcasses by grade at Scottish abattoirs in 2024

	3	4L	4H	
-U	9.0%	11.2%	1.6%	
R	17.6%	27.1%	6.3%	
O+	5.6%	7.5%	1.1%	
-O	1.6%	1.5%	0.1%	
Others:	9.7%			

Source: AHDB; QMS calculations



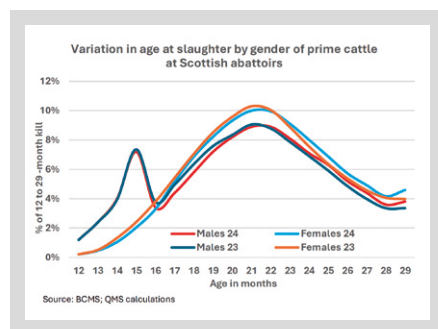
Most common grades at price reporting abattoirs in 2024

Category	Position	Scotland		England & Wales	
		Grade	Share of total	Grade	Share of total
Steers	1st	R4L	27.1%	R3	25.1%
	2nd	R3	17.6%	O+3	16.0%
	3rd	-U4L	11.2%	R4L	11.9%
Heifers	1st	R4L	33.5%	R3	22.3%
	2nd	R4H	13.4%	R4L	16.3%
	3rd	R3	11.2%	O+4L	12.1%
Young bulls	1st	R3	23.8%	R3	19.2%
	2nd	-U3	17.3%	R2	19.0%
	3rd	R4L	9.5%	-U3	9.5%
Cows	1st	R4L	12.7%	-P1	16.6%
	2nd	R3	9.4%	P+2	12.0%
	3rd	O+3	8.2%	P+1	10.0%

Source: AHDB; QMS calculations

Age of Cattle at Slaughter

At Scottish abattoirs, prime cattle age at death increased in 2024. For males, the share slaughtered at 12-17 months dropped by 1.0 percentage point (pp) to 22.6%, while the share processed at 18-23 months was 0.9 pp lower at 47.1%, meaning a 2.0 pp uplift for the share at 24-29 months, reaching 30.4%. For females, the share slaughtered at 12-17 months fell by 1.5pp to 12.2% along with the share at 18-23 months, which dipped to 53.5% (-0.9pp).

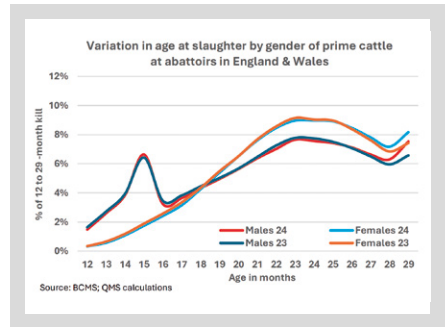


Like males the female share at 24-29 months increased significantly, to 31.9% (+2.4 pp).

In England and Wales, age at death also rose. For males, the share slaughtered at 12-17 months dipped 0.5 pp to 21.5% and the share at 24-29 months lifted by another 1.2 pp, reaching 42.6%. For females, the share slaughtered at 12-17 months dipped by 0.7pp to 9.3%, while there was a 1.2 pp increase in the share slaughtered at 24-29 months, reaching 48.3%.

Increased age at death reflected an increase in the population of older prime cattle on farm throughout much of 2024. It is possible that this reflects structural change in the dairy sector, with a higher proportion of slower finishing beef-sired dairy steers and heifers reaching abattoirs than in the past.

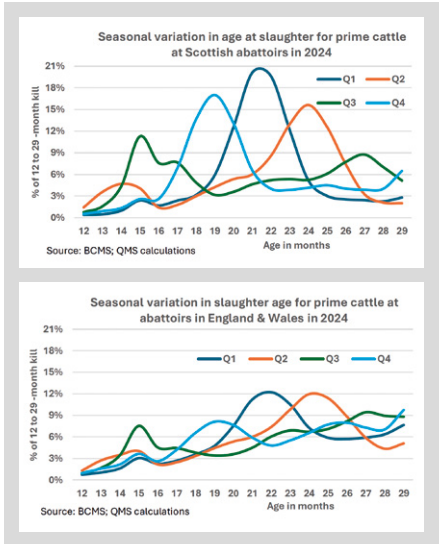
The median age at death in Scotland for cattle aged 12-29 months remained unchanged in 2024. However, the age distribution did become slightly older, with the proportion slaughtered at 12-21 months slipping to a five-year low. In England and Wales, the median age was 23 months for both males and females.



Change in average age at death for cattle aged 12-29 months at Scottish abattoirs, 2019-24						
	Median age at death in months			% slaughtered at under 22 months		
	All	Males	Females	All	Males	Females
2019	22	22	22	48.0%	49.8%	45.3%
2020	21	21	22	50.4%	52.8%	46.7%
2021	21	21	22	53.4%	55.7%	49.8%
2022	21	21	22	52.3%	54.8%	48.6%
2023	21	21	22	52.6%	55.0%	49.2%
2024	21	21	22	50.2%	52.7%	46.6%

Source: BCMS; QMS calculations

Quarterly age at slaughter shows a similar seasonal pattern through the year at abattoirs in Scotland and in England and Wales, linked to the age of spring-born cattle. However, the greater dominance of spring calving in Scotland means that this link is stronger north of the border, resulting in more intense seasonal variation.



Sheep

Prime sheep slaughter fell for a fifth consecutive year at Scottish abattoirs in 2024 and was at its lowest level of the 21st century. The low level of slaughter reflected the smaller lamb crop and slow arrival of these lambs onto the market during the summer and autumn, while record high farmgate lamb prices and the prioritisation of cattle by the processing sector may have also been a factor. At 902,600 head, throughput was down 7.4% from the previous year, by 18.8% on the five-year average, and almost 40% lower than at its 21st century peak in 2011. It is estimated that nearly 90% of these lambs moved directly from Scottish farms, highlighting that lambs sold at Scottish auctions tend to be processed in England and Wales.

Scottish abattoirs are estimated to have handled a net figure of around 36% of the Scottish-born lambs sent for slaughter in 2024. This has been based on an estimated 78% of the GB lamb crop being sent for slaughter in GB and takes into account the marketing pattern of the 2023 and 2024 lamb crops at Scottish auctions, with a higher share of the 2024 lamb crop being processed in 2025.

In 2024, the number of ewes and rams processed by Scottish abattoirs surged by 44% to a 13-year high, approaching 30,000 head, having averaged fewer than

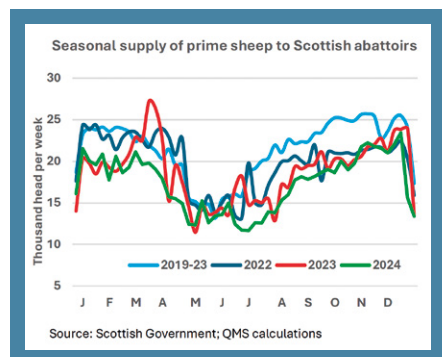
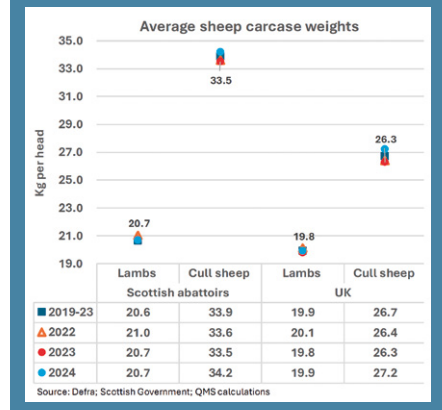
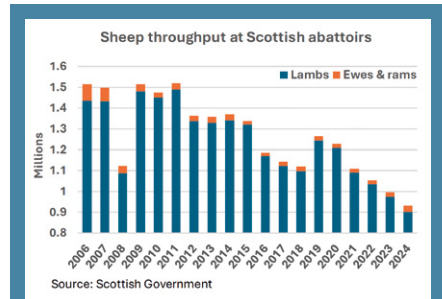
19,000 head in the previous nine years. However, numbers fell back towards previous levels in the final quarter and Scottish abattoirs are estimated to have still handled only around 9% of the ewes and rams sent to slaughter from Scottish farms.

Prime sheep carcase weights were effectively unchanged in 2024 at Scottish abattoirs, averaging 20.7kg, with a fractional decline from 2023, though they remained below their 2022 high. Average weights remained significantly heavier than the average at UK abattoirs, although the gap slipped back to a three-year low of 3.9%, having reached 4.7% in 2023.

Due to fractionally lighter weights, lamb production volumes fell more significantly than abattoir throughput, down by 7.5% at 18,700t. Meanwhile, a 2% lift in ewe carcase weights saw mutton production surge even faster than throughput, with output 47% higher at just over 1,000t. The net result was that overall sheepmeat production declined by 5.7% to 19,700t, falling 16.2% below the five-year average and by nearly 30% compared with 2014.

Seasonality of Sheep Production

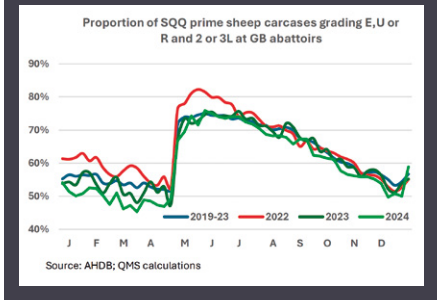
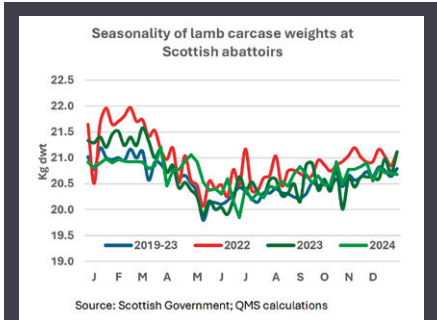
Lamb production shows much more significant seasonal fluctuations than cattle or pig production. On the supply side, lambs are born at a similar time of year while, on the demand side, consumption tends to peak around key Christian and Islamic festivals. Compared with England and Wales, Scotland's climate and topography results in a much slower arrival of new season lambs and a higher share are processed in the following calendar year.



For much of 2024, lamb throughput trailed 2023 levels. Compared with previous years, there was a limited spike in output in the run up to Ramadan, while slaughterer showed little upturn for Easter. This picture of sluggish demand was mirrored for the Eid al-Fitr festival at the end of the Ramadan on 10th April 2024.

The Eid al-Adha festival traditionally sees an uplift in kill, but the weekly total before the festival in mid-June failed to match that of 2023 (-18%), when the festival had been around a fortnight further into the new season.

After weakness for most the year, throughput did rise more strongly ahead of Christmas, reaching its annual peak in the first half of December. Nevertheless, it continued to fall slightly below 2023 levels.



Lamb carcass quality

During 2024, carcass quality continued to fall back further from the highs reached in 2021 at GB price reporting abattoirs, with 58.7% of SQQ18 carcasses grading at E, U or R for conformation and 2 or 3L for fat cover. This was a reduction of 2.4 pp on the year and well below 2021's 66.8%. In general, carcasses showed increased fat cover, with a shift from 2 and 3L towards 3H, while conformation rebalanced significantly towards O grades and R grades from U grades.



18. SQQ stands for Standard Quality Quotation. In deadweight price reporting, this encompasses carcasses weighing between 12 and 21.5kg, while in auction market price reporting, it encompasses live lambs sold at weights of 25.5-45.5kg.

R3L remained the most common grade in 2024, accounting for a marginally higher 32.9% of the total. Meanwhile, the share for R2 grades dipped and R3H grades became more common. There was also a shift from U3L to O3L grades, with the share for O2 unchanged.

SQQ Lamb carcasses by grade at GB price reporting abattoirs in 2024

	2	3L	3H
U	2.3%	7.9%	2.6%
R	14.4%	32.9%	11.8%
O	9.7%	9.9%	2.7%
Others	5.7%		

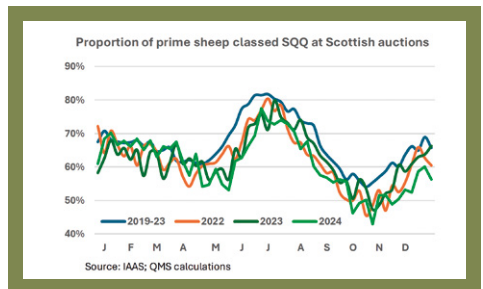
Source: AHDB; QMS calculations

SQQ Lamb carcase distribution at GB price reporting abattoirs

	Proportion grading E, U or R and 3 or 4L	Most common		2nd Most common		3rd Most common	
		Grade	Share of total	Grade	Share of total	Grade	Share of total
2022	63.4%	R3L	34.0%	R2	16.4%	R3H	11.3%
2023	61.1%	R3L	32.8%	R2	15.0%	R3H	10.7%
2024	58.7%	R3L	32.9%	R2	14.4%	R3H	11.8%

Source: AHDB; QMS calculations

A further proxy of lamb quality is the proportion of prime sheep sold at auction markets that qualify as SQQ due to their live weight at sale (25.5-45.5kg liveweight). After a considerable decline of 9.0 pp in 2022, and a further reduction of 1.2 pp in 2023, the proportion stabilised at 59.8% in 2024.



Pigs

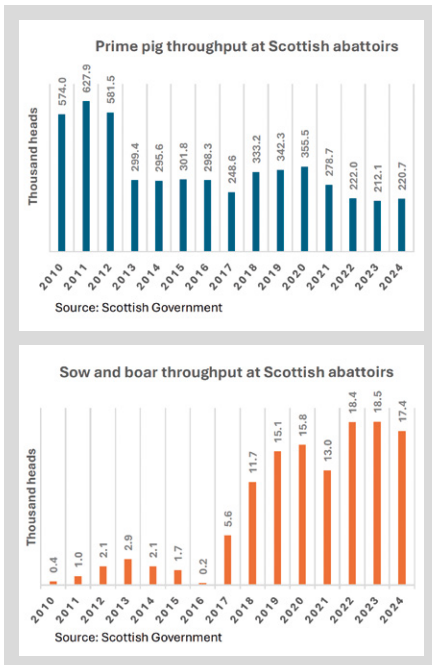
Following three years of declines, prime pig slaughter at Scottish abattoirs rebounded in 2024, rising 4.1% to 220,700 head. Nevertheless, numbers were still well below the 2020 level, which is the high point since the closure of Broxburn abattoir in 2012 (-38%). On a weekly basis, slaughter increased to an average of just over 4,240 head.

However, sow and boar throughput dipped back from the highs of 2022 and 2023, down by almost 6% to 17,400 head, averaging around 335 head per week.

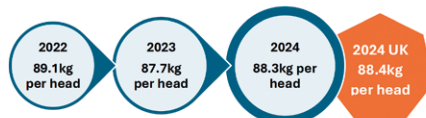
A total pig kill at Scottish abattoirs of 238,100 head indicates that approximately 58% of the Scottish-born pigs being sent directly for slaughter from Scottish farms went to abattoirs in England.

Prime pig carcass weights are estimated to have rebounded after a dip in 2023, up 0.6kg (0.7%) at 88.3kg in 2024. While remaining below the 2022 peak of 89.1kg, which had been driven by a significant backlog on farm at the start of that year, it was still the second highest on record, up 2.2% on the 2019-23 average, and 9.1% higher than 10 years before. This highlights considerable productivity gains in pig production.

The combination of increased throughput and weights led to a 4.8% uplift in prime pigmeat production in 2024, reaching 19,500t. Meanwhile, despite lower throughput, significantly heavier weights meant that sow meat production was almost unchanged, at just under 2,600t. Total pigmeat production is estimated to have edged back above 22,000t (+4.0%) but to not quite have rebounded to 2022 levels.



Average carcass weights (EU spec) of clean pigs in Scotland

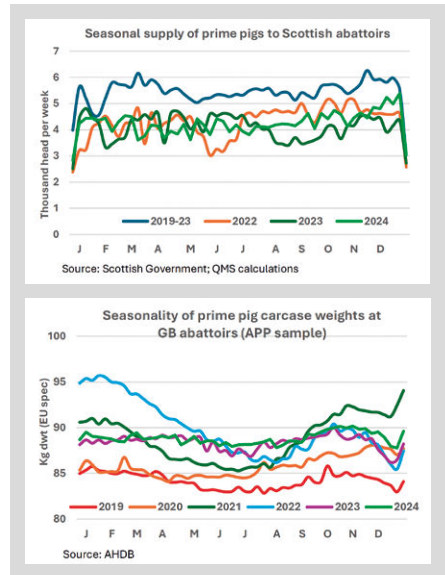


Source: Scottish weights are estimated by QMS using the Scottish Government's slaughter survey and AHDB's APP price reports; UK weight converted into EU spec by QMS from Defra slaughter statistics and AHDB deadweight price reports

Seasonality of Pig Production

Prime pig slaughter has less of a seasonal trend at Scottish abattoirs than in the UK, where production tends to fall to its lowest levels in the summer months. Given the high share of pigs crossing the border to be slaughtered in England, throughput in Scotland is more likely to reflect variables such as customer demand and labour supply than availability of pigs for slaughter.

Prime pig carcasse weights have a seasonal profile, tending to be at their lightest through the summer months and heaviest in winter. Weights fall in the run up to Christmas and rebound sharply as slaughter age adjusts to fit the shorter working weeks.



Scottish Abattoir Output and Employment

Nineteen red meat abattoirs operated in Scotland in 2024 and submitted levy returns to QMS, unchanged from 2023, although one of these sites has since closed in 2025. Cattle slaughter took place on 17 sites and sheep slaughter on 15, while only nine handled pigs, down one from 2023.

Based on weighting abattoir throughput by the different levels of carcasse weights in the sector, cattle are estimated to have accounted for approximately 79% of abattoir production in 2024, with sheep at 10% and pigs accounting for 11%. This is quite different from a UK abattoir production split of 43%, 12% and 44%, respectively. The volume of abattoir production is estimated to have edged higher in 2024, with heavier carcasse weights more than offsetting lower throughput. Turnover from primary red meat processing in Scotland is estimated to have risen for a fifth consecutive year in 2024, lifting 5% to £1.14bn.

Estimates for previous years have also been revised slightly higher. Revenue generated from beef, lamb and offal is estimated to have risen, partially offset by lower turnover from hides and skins plus a marginal reduction from pork.

Scottish abattoir output

	Number of animals			Volume of meat (t)			Estimated sales value (£m)		
	2023	2024	y/y change	2023	2024	y/y change	2023	2024	y/y change
Cattle	418,400	415,800	-0.6%	153,000	153,700	+0.5%	804	836	+3.9%
Sheep	975,700	944,300	-3.2%	20,500	19,900	-2.6%	129	155	+19.8%
Pigs	230,200	237,000	+2.9%	21,200	21,900	+3.7%	56	56	-0.3%
Combined	1,624,300	1,597,100	-1.7%	194,600	195,600	+0.5%	990	1,046	+5.7%
Offal	n/a	n/a	n/a	n/a	n/a	n/a	72	73	+1.0%
Skins & hides	n/a	n/a	n/a	n/a	n/a	n/a	20	18	-5.5%

Source: QMS Processor Survey; QMS levy returns, QMS calculations and estimates; Scottish Government 2023 based on 52 weeks to 31st December 2023; 2024 based on 52 weeks to 29th December 2024; Slaughter numbers and tonnage rounded to nearest 100; sales value rounded to nearest million

In cattle processing, higher turnover reflects a modelled increase in wholesale prices for beef and offal plus heavier carcasse weights more than offsetting a slight reduction in throughput and reduced hide values. For sheep processing, a surge in wholesale sheepmeat prices and rebound in sheepskin value more than offset lower throughput and sheep offal value. By contrast, turnover from pig processing is estimated to have dipped slightly despite higher throughput due to lower wholesale prices for pork and fifth quarter products.

Reflecting the continuing tightness of labour supply, productivity gains and structural change within the sector between 2023 and 2024, employment in the primary processing sector is estimated have fallen to around 2,500 in 2024 compared with a revised estimate of 2,600 in 2023. However, a third year of sharply rising wages (+11%) is estimated to have offset the decline, resulting in a total amount paid out in primary processing wages rising 8% to an estimated £77.2m¹⁹. Structural change in the sector is estimated to have influenced the rise in overall average wage.

Meanwhile, it is estimated that the share of UK and common travel area nationals in the labour force slipped back to 50% in 2024 compared with an upwardly revised 56% in 2023, reflecting a further jump higher in the use of non-UK or EEA origin staff to fill gaps in the labour force, at a significant cost to processing businesses. Non-UK or EEA origin staff are estimated to have reached 26% of the total, up from around 17% in 2023 and just 2% in 2022.

The cattle processing sector continues to be more evenly spread in terms of capacity than the sheep or pig sectors, which are dominated by a small number of very large sites.

19. The estimated wage bill is based on average wages and salaries reported by processing companies in accounts filed with Companies House for 2023, plus ONS figures for manufacturing earnings growth in 2024 (series K551). Wages are weighted by production levels.



Cattle

- 17 abattoirs
- 7 abattoirs over the deadweight price reporting threshold of 20,000 head
- 90.6% of kill in 7 largest abattoirs
- 0.7% of kill in 5 smallest abattoirs



Sheep

- 15 abattoirs
- 95.7% of kill in 5 largest abattoirs
- 0.7% of kill in 5 smallest abattoirs



Pigs

- 9 abattoirs
- 99.3% of kill in 5 largest abattoirs
- 0.7% of kill in 4 smallest abattoirs

Sales Distribution of Primary Red Meat Processors by Destination in 2024

	Scotland		Rest of UK		Exports	
	Value (£m)	% by value	Value (£m)	% by value	Value (£m)	% by value
Beef	271	32	423	58	78	9
Sheepmeat	29	19	79	51	47	30
Pigmeat	36	65	20	35	<1	<1
Total red meat	336	32	522	56	124	12
Fifth quarter	14	19	41	57	18	24
Skins & hides	14	74	3	14	2	12
Total output	363	32	631	55	144	13

Source: QMS Processor Survey; QMS calculations and estimates

Note: Distribution based on first point of delivery

While England and Wales is estimated to have remained the most common first point of sale for Scottish processors in 2024, at 55% of revenue, there was a rebalancing away from the main destination in favour of export activity in both the beef and lamb sectors. This move away from England and Wales was partially offset by a shift in fifth quarter sales from Scotland to south of the border.

It should be noted that, in some instances, beef, lamb and pork is delivered to processing and packing sites in England, Wales and Northern Ireland before returning to Scotland in shelf-ready retail packs or will be exported from there.

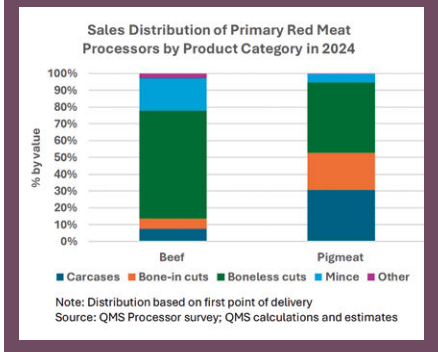
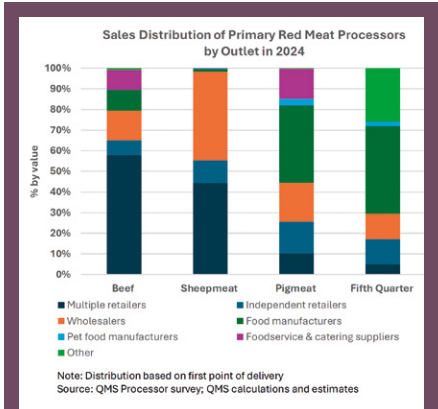
Although the Scottish processing sector is estimated to have continued to direct less of its produce overseas than the UK as a whole, there was a narrowing of the gap in 2024, as beef and lamb exports jumped higher, reflecting a change in business models within the sector.

In the pork sector, direct exports from Scotland are believed to have remained negligible, although some products may be shipped overseas following secondary processing. However, there is some prospect of export activity in 2025 following the reauthorisation of Brechin abattoir for the Chinese market.

Fifth quarter products continued to play an important role in helping cattle and sheep processors achieve carcass balance, with prices often looking much more attractive overseas. Fifth quarter products are much more likely to be shipped to non-EU markets than beef or lamb.

Multiple retailers remained the dominant market outlet for Scotland's beef and lamb processors in 2024, but export growth meant that sales rebalanced towards wholesalers. In the pork sector, sales are estimated to have been spread more evenly across the different types of outlets but with food manufacturing being the most significant.

Product sales mixes continued to vary considerably by species, with boneless cuts the main product for beef processors. Trade in carcasses no longer dominates the primary pork sector, with greater processing into retail cuts and pork products now taking place in Scotland. In the sheepmeat sector, the dominance of carcasses in UK lamb exports coupled with the growth in Scotland's lamb exports combined to make carcasses the main product, closely followed by bone-in cuts such as leg joints.

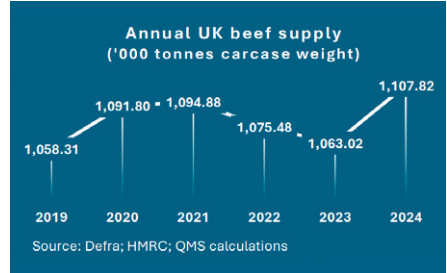


Red Meat Supply and Consumption

Product Available for Consumption²⁰

Beef

Following a decline in 2022 and 2023, the total volume of beef added to the UK market is estimated to have increased by an additional 4.2% in 2024. With a 3.75% rise in domestic production and an almost 8% increase in imports, the 9% uplift in exports was more than offset. Market supply rebounded close to the previous peak reached in 2018, signalling demand-side strength.



Annual UK beef supply balance sheet in 2024 ('000 tonnes carcase weight)



Production
934.3
+3.57% y/y

+

Imports
318.4
+7.9% y/y

-

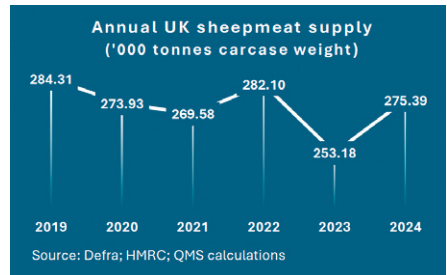
Export
144.9
+9.2% y/y

=

Total Supply
1,107.8
+4.2% y/y

Sheepmeat

After a sharp drop in 2023, the new supply of sheepmeat added to the UK market jumped by 8.8% in 2024, driven by increased demand. This increase was the result of imports surging by close to 50% along with a significant decline in exports (-13.5%), which combined to more than offset a sharp fall in domestic production (-7%).



Annual UK sheepmeat supply balance sheet in 2024 ('000 tonnes carcase weight)



Production
266.5
-6.9% y/y

+

Imports
90.3
+47.6% y/y

-

Export
81.6
-13.5% y/y

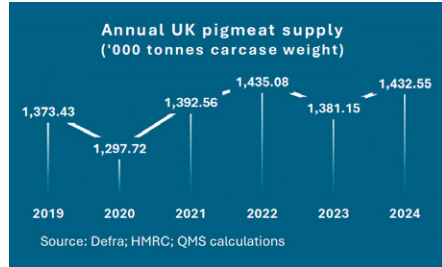
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Total Supply
275.4
+8.8% y/y

²⁰ New supplies made available during the calendar year. This excludes any change in inventories during the year, which would be needed to make a better estimate of annual consumption. Import and export volumes are converted from product weight into carcase weight equivalent.

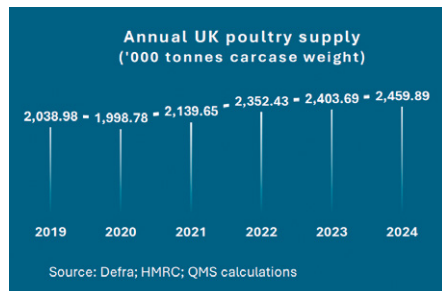
Pigmeat

After a significant decline in 2023, pigmeat supply rebounded strongly in 2024, almost returning to the 2022 peak. Volumes increased by 3.7%, driven by a 3.7% rise in domestic production and a sharp dip (-7.3%) in exports, while imports edged higher. The muted lift in import supply was perhaps surprising given a substantial increase in the price competitiveness of EU pork in 2024, but it is likely to reflect limited import requirements due to higher domestic output and reduced export demand.



Poultry

New supply of poultry continued its long-term upwards trend in 2024. Despite the rise in exports by 8.9%, production levels and imports rose by 3% each, increasing domestic supply by more than 2%. This saw poultry maintain its position as the most commonly available meat category for use in retail, catering and further processing in the UK, likely reflecting its attractive price point, although its share of total meat supply did soften slightly. Poultry supply first overtook beef in 1987 and pigmeat in 1991.



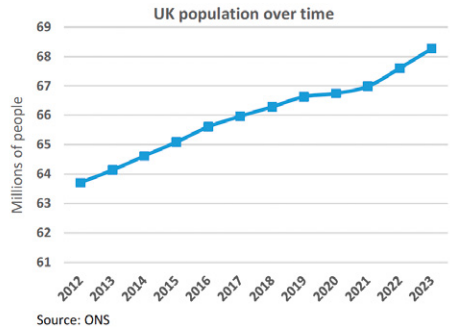
Annual UK poultry supply balance sheet in 2024 ('000 tonnes carcass weight)

Structural change in UK meat supplies over the past decade (tonnes)

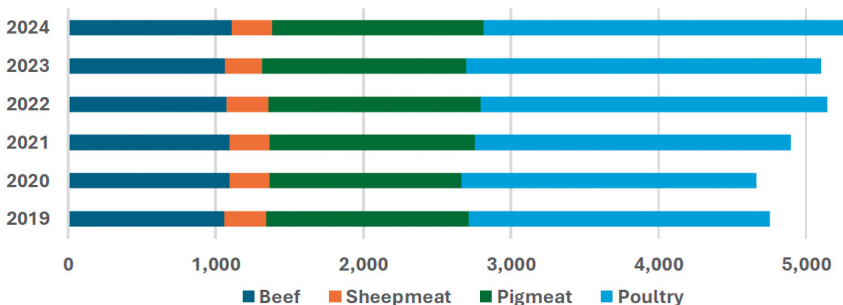
	2012-14 avg annual net supply	2022-24 avg annual net supply	Change over decade	% of total 2012-14	% of total 2022-24
Beef	1.041m	1.076m	+3.4%	23.2%	20.9%
Sheepmeat	0.295m	0.274m	-7.1%	6.6%	5.3%
Pigmeat	1.326m	1.401m	+5.7%	29.6%	27.2%
Poultry	1.818m	2.405m	+32.3%	40.6%	46.6%
Total	4.480m	5.158m	+15.1%	100%	100%

Source: Defra (UK home-fed meat production, trade and supplies); QMS calculations
Supply = production + imports – exports

In contrast to the results of Defra's Family Food Survey, which can be highly volatile from year-to-year as it relies on food diary data collected from a small sample of households over a two-week period, Defra's meat balance sheets point to an overall upwards trend in meat demand and consumption over time in the UK. A rising UK human population has been supporting overall meat consumption levels.



Annual UK meat supply ('000 tonnes carcase weight)



Source: Defra; HMRC; QMS calculations

Per Capita Supplies

In 2023, strong migration levels meant that the ONS estimated that the UK population increased by 1.0%, marginally faster than the previous year's increase. With mid-2024 population estimates yet to be published, the 2024 population has been estimated based on a halving of the population growth rate, following a slowdown in net migration reported by the ONS. As a result of population growth, an increased meat supply would have been required to maintain per capita supply at 2023 levels, limiting the estimated increase in UK beef, lamb and pork supply in 2024 when viewed in per capita terms.

Scottish per capita supply can be estimated from population statistics, differences in sale levels reported by Kantar between Scotland and GB as a whole, and from differences in

consumption levels reported in Defra's Family Food datasets for the nations and regions of the UK. It should be noted that these estimates are based on consumption at home and it can be hard to separate processed product categories into the different component meats. Per capita consumption is estimated to have risen for beef, lamb, pork and poultry in 2024, highlighting the ongoing popularity of meat within the diet, reflecting factors such as taste and cultural preferences. Improved household incomes and slower inflation may have helped support demand in 2024.

The evidence continues to indicate above-UK average beef consumption in Scotland but below-average pigmeat consumption and much lower levels of sheepmeat consumption.



Per capita supplies in UK 2024
76.9kg per person
 (+2.9% y/y)



Beef
 16.1kg (+3.7% y/y)



Sheepmeat
 4.0kg (+8.2% y/y)



Pigmeat
 20.9kg (+3.2% y/y)



Poultry
 35.9kg (+1.8% y/y)



Per capita supplies in Scotland 2024
70.4kg per person
 (+1.8% y/y)



Beef
 17.7kg (+1.6% y/y)



Sheepmeat
 1.8kg (+7.2% y/y)



Pigmeat
 18.3kg (+1.4% y/y)



Poultry
 32.7kg (+1.8% y/y)

Source: Defra, Kantar, ONS; Scottish Government; QMS calculations and estimates.
 Note: excludes adjustment for opening and closing inventory.

Self-sufficiency

Scotland's abattoir production of beef and sheepmeat far outstrips estimated total consumption levels. This contrasts with the UK as a whole, which is a net importer of beef, while varying from year-to-year between a small net importer or net exporter of sheepmeat. In the pigmeat sector, while Scotland and the UK are both net importers, the gap is much larger in Scotland, with abattoir output less than a quarter of estimated demand, compared to being two-thirds of demand at UK level.

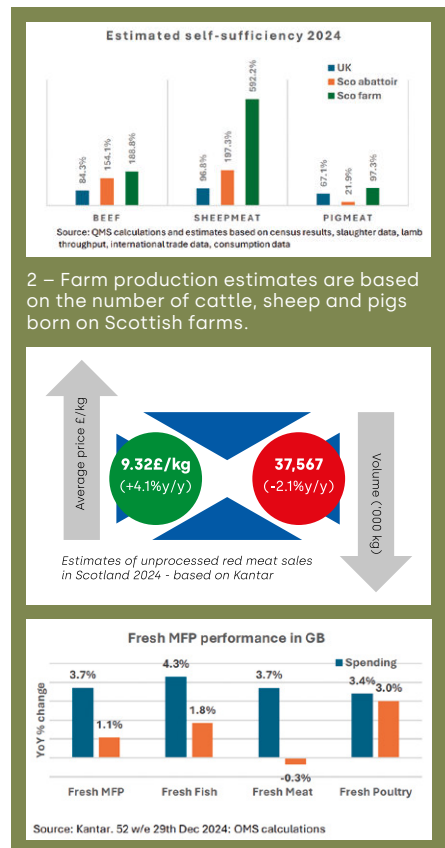
However, self-sufficiency based on farm production levels²¹ would be higher for beef and surge for sheepmeat, and would rise to close to 100% for pigmeat, reflecting the significant volume of cross-border movement of live animals for finishing and for slaughter.

Basic estimates of self-sufficiency do not, however, take into consideration the demand for and supply of different cuts of meat or processed meat products, or the location of specialist further processing and packing sites, which can reflect workforce availability.

Retail sales

Shoppers' spending on fresh meat, fish and poultry (MFP) increased by 3.7% in 2024, with all categories seeing growth, according to data from Kantar²². However, fresh meat was the only category to record a decline in volume sales in Great Britain, down by 0.3%.

Despite a significant reduction in inflation levels in 2024, the average price of primary red meat in Scotland continued to rise, contributing to a 2% increase in spending on red meat, according to Kantar²³. However, this uptick in spending was accompanied by a 2.1% decline in volume, reflecting shoppers' cautious spending habits.



21. Farm production estimates are based on the number of cattle, sheep and pigs born on Scottish farms

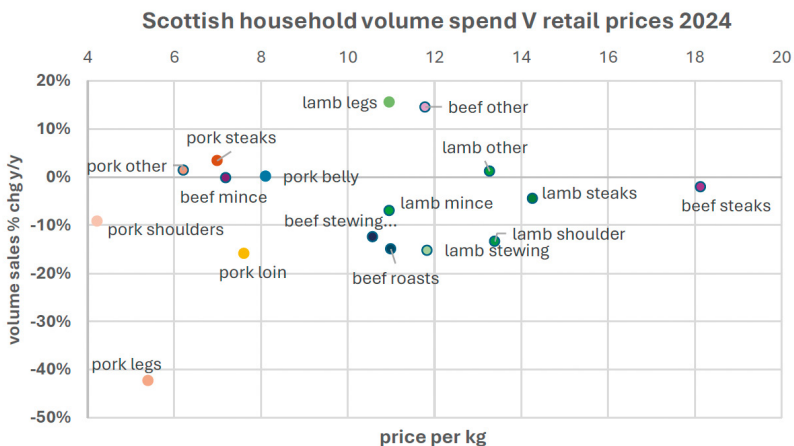
22. Kantar, 52 weeks ending 29th December 2024. Fresh meat covers both processed and unprocessed red meat.

23. Kantar; unprocessed red meat; 52 weeks ending 29th December 2024 compared with 52 weeks ending 31st December 2023.

Notably, the volume reduction was primarily due to smaller basket sizes, offset by an increase in the number of shopping trips for red meat.

While shoppers continued to seek value in 2024, some new trends emerged. Convenience appeared to be a priority for shoppers as volume sales of beef marinades surged in Scotland. As a more affordable protein, certain pork cuts, such as pork steaks and belly, saw volume growth in 2024. Some shoppers, especially those with higher income, refocused on quality rather than price, therefore, the volume sales of lamb increased by 1%, despite being the most expensive protein compared to beef and pork.

Beef maintained its popularity in Scotland, with 84.1% of households purchasing this protein in 2024. Almost all beef cuts had a higher penetration level in Scotland than in GB, except for beef roast. In contrast, lamb and pork showed lower penetration levels in Scotland compared with GB overall. However, lamb attracted more shoppers in the Scottish market in 2024, signalling potential growth.



Source: Kantar; GMS calculations
 52w y/y comparison for week ending 29th December 2024; low sample sizes for lamb shoulder & lamb stewing;
 'beef other' includes: marinades; 'lamb other' for diced/cubed, mixed cuts pack and half lamb;
 'pork other' includes: marinades, mince, other cut, diced/cubed





Red meat retail performance in Scotland 2024

Beef



- +2.3% in total spend
- Average price per kilo increased by 5% to £10.26/kg
- Volume fell by 2.5%
- Beef marinades outperformed other beef cuts
- Proportion of Scottish households who shopped beef remained higher than in GB, at 84.1%.

Lamb



- +2.3% in total spend
- Average price per kilo increased by 1.2% to £12.41/kg
- Volume increased by 1%
- Leg roasting volume surged by 15.6%, as 17.3% more households purchased the cut, with 12.9% more volume/trip
- Slightly more Scottish households shopped for lamb at a proportion of 31.3%

Pork



- -1.9% in total spend
- Average price per kilo increased by 2% to £6.54/kg
- Volume fell by 3.8%
- Pork steaks and belly increased in volume while pork leg roasting dipped significantly by 42%
- Proportion of Scottish households who shopped pork fell slightly to 61%

Bacon and Sausage



- Both bacon and sausage saw spending growth of 2.9% and 2% due to price increases
- Bacon prices rose by 4.2% to £7.37/kg, while sausage prices increased by 2.3% to £5.93/kg
- Bacon volume fell by 1.3%, and sausage volume declined by 0.3%
- 86.2% of Scottish households shopped bacon and 81.6% for sausage

Retail Prices

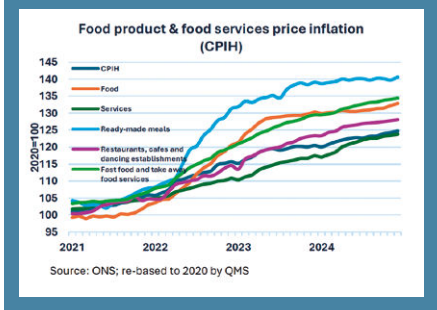
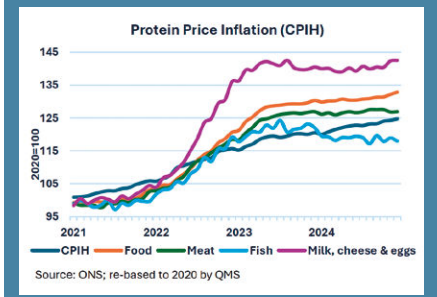
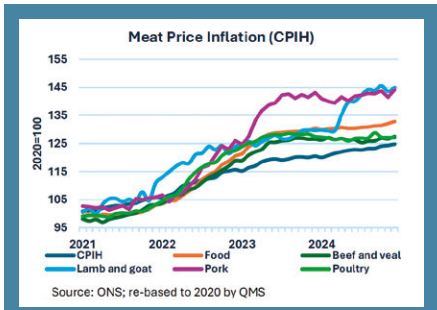
Consumer Prices Index (CPIH²⁴)

Following a surge in 2022 and the first half of 2023, consumer price inflation slowed in the second half of 2023, with the softening continuing through 2024. Despite softening, inflation averaged just over 3% in the year as a whole, holding well above the Bank of England's 2% target²⁵.

Goods price inflation slowed sharply in 2024, with prices averaging marginally lower than the previous year, reflecting lower energy and fuel prices and the pass through of reduced commodity costs to some consumer goods prices. By contrast, the service sector faced continued significant upwards pricing pressure as rising labour costs were passed through to services prices, with strong wage growth also underpinning prices from the demand side.

In the meat sector, consumer price inflation slowed sharply after an upwards rebalancing of prices in 2022 and 2023, reflecting a generally more limited upwards pressure on farmgate prices. However, lamb retail prices were an exception, rising more strongly in 2024 than 2023, reflecting a record high year for farmgate prices due to strong demand and lower domestic production.

Costs of ready meals and pricing in the foodservice sector tend to reflect wider economic forces such as the cost of labour and consumer demand more closely than the more volatile prices of their raw materials. As such, they continued to outpace the overall level of food price inflation in 2024.



Consumer price index and annual inflation rate for selected categories (CPIH)

	Change from previous year (%)				Annual average index (2015 = 100)		
	2021	2022	2023	2024	2022	2023	2024
All prices	+2.5	+7.9	+6.8	+3.3	120.5	128.6	132.9
All goods	+2.8	+12.1	+7.6	-0.2	121.4	130.6	130.4
All services	+2.2	+4.6	+6.0	+5.8	119.2	126.4	133.7
Food	+0.3	+11.1	+14.7	+2.6	115.5	132.5	135.9
Meat	-0.5	+11.1	+12.8	+1.9	110.6	124.8	127.1
Beef and Veal	-0.3	+11.4	+12.4	+1.5	106.4	119.5	121.4
Lamb & Goat	+4.1	+14.9	+6.0	+9.4	131.6	139.4	152.5
Pork	+1.6	+10.9	+20.3	+2.9	111.9	134.6	138.5
Poultry	+0.3	+14.0	+11.4	-0.2	102.3	113.9	113.7
Edible offal	+3.2	+16.9	+18.9	-10.3	123.3	146.7	161.8
Dried, salted or smoked meat	-1.5	+8.1	+12.8	+0.5	108.5	122.5	123.1
Fish	-2.2	+10.5	+8.9	-2.2	122.7	136.2	133.2
Milk, cheese and eggs	+0.9	+7.2	+18.8	0.0	119.1	141.5	141.5
Ready-made meals	+3.0	+14.1	+13.9	+3.0	125.6	143.0	147.3
Restaurants, cafés and dancing establishments	+3.0	+6.9	+8.9	+5.5	123.0	133.9	141.3
Fast food and takeaway food services	+2.6	+9.0	+10.2	+5.2	131.5	145.0	152.5

Source: ONS

24. CPIH is a measure of consumer price inflation which includes owner occupiers' housing costs.

25. Please note that the Bank of England inflation target is based on CPI rather than CPIH, which is quoted here and can vary from the CPI. The annual CPIH increase was 3.3% in 2024 while the CPI increased by 2.5%. However, in the previous year, the CPI rose faster than the CPIH.

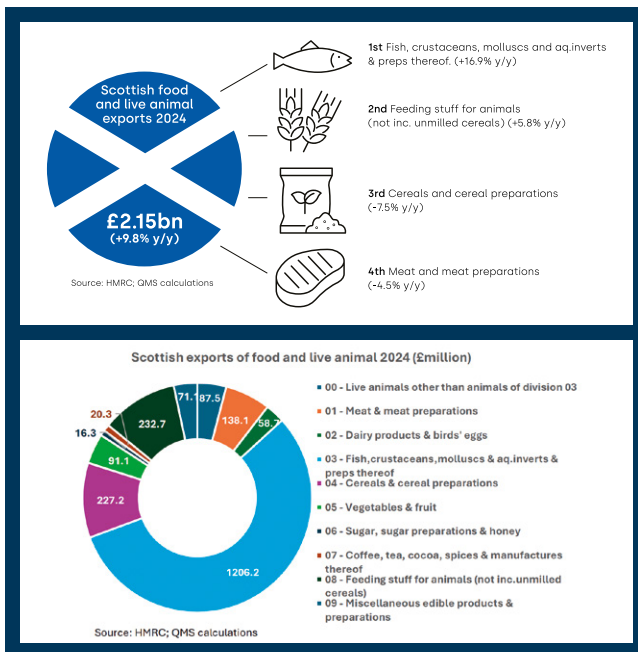
International Trade

Scottish Trade

HM Revenue and Customs publishes estimates of the level of exports from each of the devolved nations and English regions on a quarterly basis²⁶. These trade figures are reported by Standard International Trade Classification (SITC) Division, rather than the more detailed Harmonised System (HS).

Scottish food and live animal exports 2024

Scottish exports of food and live animals reached £2.15 bn in 2024, marking a significant 9.8% increase from the previous year. Fish and seafood remained the primary export category, and its share out of the total Scottish exports of food and live animals increased to 56.1% in 2024. Remaining the fourth largest category meat and meat preparations saw a decline in share, falling to 6.4% last year.

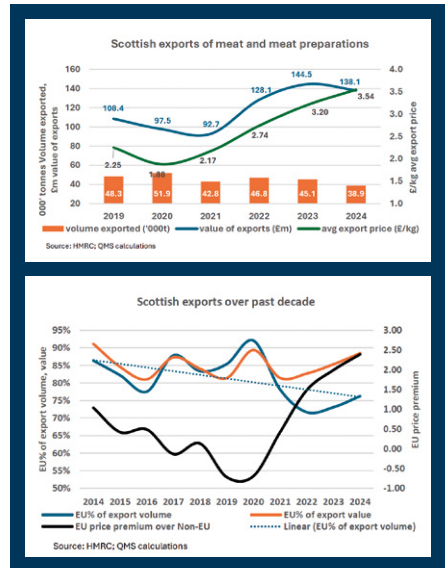


26. When a company is based in more than one UK region, its exports are allocated regionally by the number of employees based there. As a result, the data needs to be treated with caution. These trade figures are reported by Standard International Trade Classification (SITC) Division, rather than the more detailed Harmonised System (HS), meaning that the most detailed level of breakdown for meat is 'meat and meat preparations', which will include prime cuts as well as offal, cured products, and cooked meat and offal products. Available at: www.uktradeinfo.com/trade-data/rts-custom-table

Scottish exports of meat and meat preparations 2024

Scottish exports of meat and meat preparations declined in 2024, falling by 4.5% from the previous high and reaching £138.1 million. Export volume continued to slide for a second year in a row, decreasing by a significant 13.6% year-on-year, amounting to 38,949 tonnes, trailing 17% below the five-year average. The average export price increased for the fourth consecutive year, up by 10.6% or 34p/kg, reaching £3.54/kg.

Preference of Scottish meat exports to the European Union (EU) strengthened in 2024, with the EU accounting for 76% of the export volume, despite the long-term trend of volume shifting from EU to non-EU. The EU continued to dominate in value sales, contributing 88% of total export value. Notably, the premium on average export prices to the EU over non-EU markets broadened to nearly £2.4/kg in 2024. This suggests a strategic focus on premium markets within the EU, while rebalancing towards lower-priced products for non-EU markets.



UK trade of meat and edible meat offal 2024

Exports (value) £1.91bn +4.5% yoy	Imports (value) £5.19bn +5.6% yoy
Exports (volume) 0.73mn tonnes +3.9% yoy	Imports (volume) 1.46mn tonnes +4.9% yoy

Source: HMRC; QMS calculations

UK overseas trade

At UK level, detailed import and export statistics estimates under the HS system are published by HM Revenue and Customs, providing a view of the trade environment in which Scottish producers and processors operate.²⁷

In 2024, the UK exports of meat and edible meat offal rebounded by 4.5% in value and 3.9% in volume, with a slight increase of 0.5% in average export prices.²⁸ UK imports of meat and edible meat offal continued to increase in 2024, lifting by 5.6% in value and 4.9% in volume.

27. www.uktradeinfo.com/trade-data/ots-custom-table

28. HS02 Meat and edible meat offal

Beef

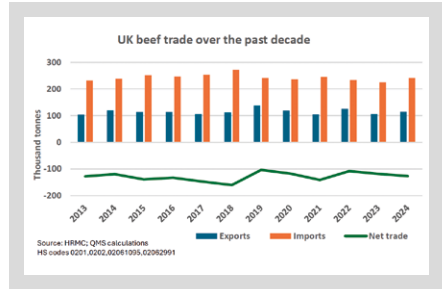
Over the last decade, the UK has been a net importer of beef to meet domestic demand. The gap between imports and exports has widened, reaching 126.9 thousand tonnes in 2024. Both beef imports and exports rebounded compared to the previous year, despite trailing 1% below the ten-year average.

Major Trading Countries 2024

The European Union (EU) remains the UK's primary trading partner in beef, representing 91.7% of import volume and 85.6% of export volume in 2024, although there was a slight increase in trading with non-EU countries.

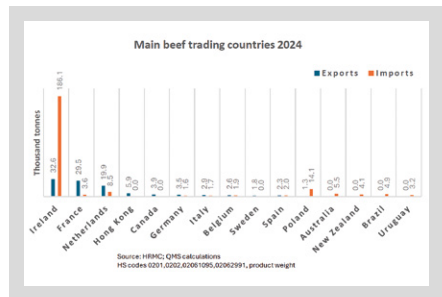
Ireland stood out as the UK's leading beef trading country for both imports and exports, particularly dominating imports with a 76.9% share in 2024. The average export price to Ireland was £4.45/kg, while the average import price from Ireland was £5.69/kg, trading 7p below the total average import price. The primary traded beef products were fresh or chilled bovine boneless meat²⁹, followed by frozen boneless meat.³⁰

Notably, beef exports to Canada tripled in 2024, driven primarily by trade in boneless meat. The year also marked the first full calendar year covered by free trade agreements with Australia and New Zealand. As a result, imports from these two countries surged, increasing by 189% and 125% respectively.



EU – main beef trading partners with UK 2024

91.7% of UK imports
85.6% of UK exports



29. HS 02013000 Fresh or chilled bovine meat, boneless

30. HS 02023090 Frozen bovine boneless meat (excludes forequarters, whole or cut into a maximum of five pieces, each quarter being in a single block 'compensated' quarters in two blocks, one of which contains the forequarter, whole or cut into a maximum of five pieces, and the other, the hindquarter, excludes the tenderloin, in one piece, crop, chuck and blade and brisket cuts).

	Ireland	France	Netherlands	Hong Kong	Canada	Germany	Italy	Belgium
Exports shares	28.3%	25.6%	17.3%	5.1%	3.4%	3.1%	2.6%	2.2%
Imports shares	76.9%	1.5%	3.5%	0.0%	0.0%	0.6%	0.7%	0.8%

	Sweden	Spain	Poland	Australia	New Zealand	Brazil	Uruguay
Exports shares	1.6%	2.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Imports shares	0.0%	0.8%	5.8%	2.3%	1.7%	2.0%	1.3%

Imports

In 2024, the value of beef imports saw a significant increase, rising by 11.2% to nearly £1.4 billion. This was primarily driven by a strong rebound in volume, up 7.6%, supported by a 3.3% increase in the average import price. Furthermore, import volumes were 2.3% above the five-year average.

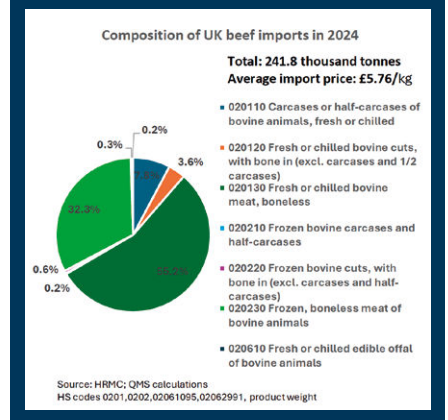
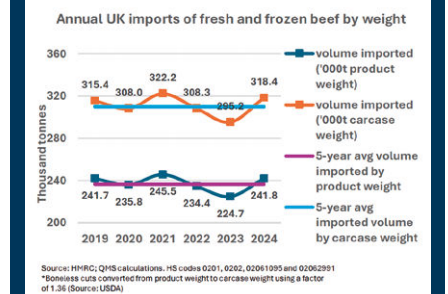
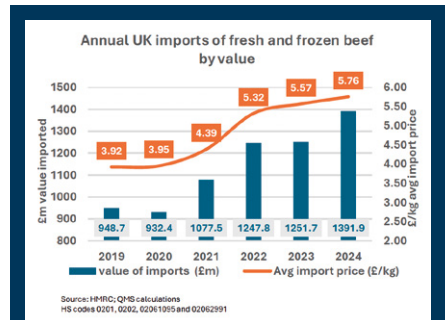
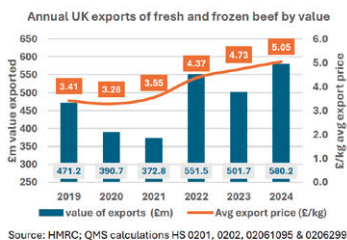
Boneless meat remained the primary trading category, accounting for 87.5% of the imported beef in 2024.

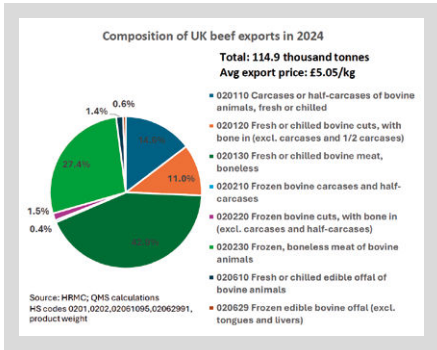
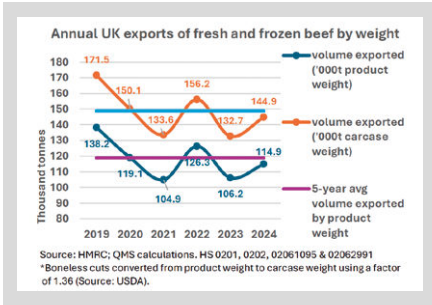
Exports

The value of beef exports rebounded strongly by 15.6% in 2024, reaching the highest level in the past decade despite average export prices rising by nearly 7%, highlighting the strength of demand.

A total of 114.9 thousand tonnes of beef were exported in 2024, representing an 8.2% increase compared to the previous year, although still below the 2022 level and 3.4% under the five-year average.

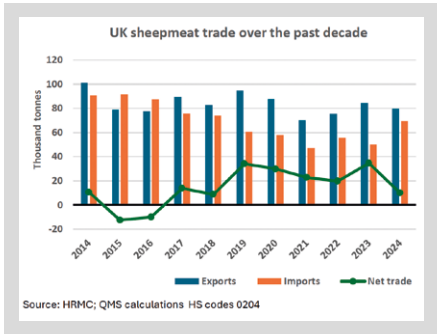
Boneless meat remained the primary export category, accounting for 70.4% of total beef exports in 2024.





Sheepmeat

The UK has continuously been a net exporter of sheepmeat³¹ since 2017. The volume of net trade narrowed down to 10 thousand tonnes in 2024, primarily driven by a surge of sheepmeat imports. While sheepmeat exports trailed 5.5% behind the ten-year average, import levels surged in 2024, trading 28.2% above the five-year average and 0.7% higher than the ten-year average.



Major trading countries analysis 2024

In 2024, the EU remained the primary destination for UK sheepmeat exports, comprising 94.8% of the total volume, while the oceanic region strengthened its position as the main supplier of sheepmeat to the UK, contributing to 84.1% of total imports.

France firmed its position as the top destination for UK sheepmeat, raising its share to 53.8% of the total export volume. Meanwhile, New Zealand continued as a key supplier of sheepmeat to the UK, with the volume surging by 14.5 thousand tonnes and 55.5% in 2024. Australia notably increased its supply to the UK as well, with a surge of 6.4 thousand tonnes and 56%.

94.8%
(+0.5pp y/y)

Of the UK's Sheepmeat exports went to the EU in 2024 – product weight



31. HS code 0204 also includes goat meat but trade is minimal

	France	Germany	Belgium	Netherlands	Italy	Portugal
Exports	53.8%	16.9%	11.5%	5.7%	3.6%	1.3%
Imports	0.1%	0.0%	0.1%	1.2%	0.4%	0.0%

	Ghana	Ireland	New Zealand	Australia	Spain
Exports	1.2%	1.2%	0.0%	0.0%	0.2%
Imports	0.0%	9.9%	58.6%	25.6%	1.6%

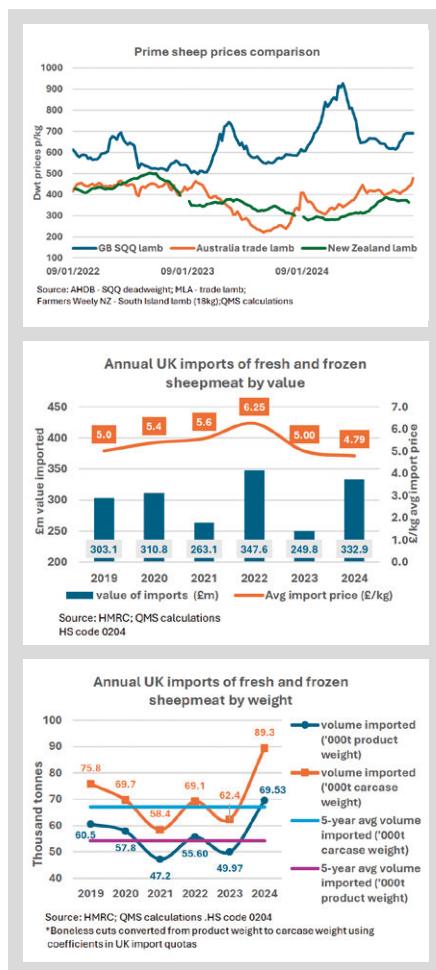
While prime sheep prices in Great Britain remained significantly higher than those in Australia and New Zealand throughout 2024, the price gap fuelled demand for cheaper imported alternatives. As a result, imports from those two countries surged, while the average import prices fell by 2.3% and 8.8%, respectively.

Imports

In 2024, UK sheepmeat imports saw a significant rebound in both value and volume, surging by 33.3% and 39.2% respectively, well above five-year averages.

Frozen bone-in cuts remained the primary trading category, accounting for 47.6% of total sheepmeat imports and increased by 11.1 thousand tonnes compared to 2023. Imports of frozen boneless cuts rose significantly as well, up by 9.8 thousand tonnes in 2024.

In 2024, the volume of sheepmeat imports showed a similar distribution throughout the year to that of the previous year, despite a notable uplift overall. There was an increase in lamb leg³² imports during the traditional Easter peak, however, the share of other bone-in cuts saw a notable rise throughout the year, particularly for fresh sheep chines and/or best ends³³.



32. HS02042250 fresh or chilled sheep legs and HS02044250 frozen sheep legs

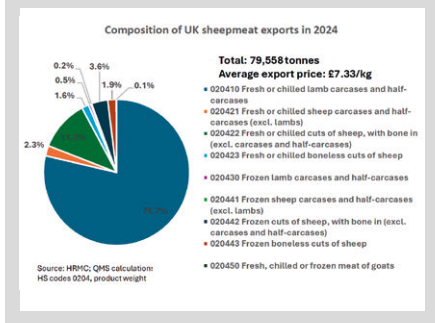
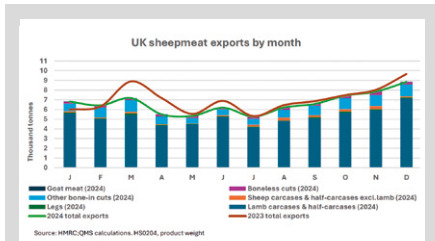
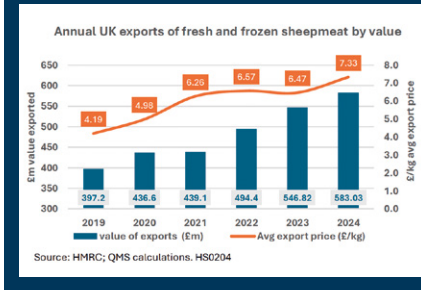
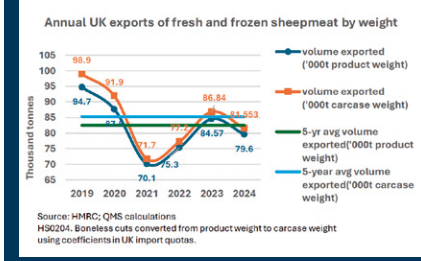
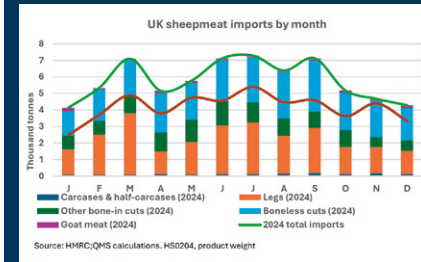
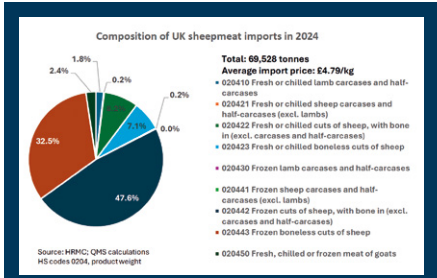
33. HS02042230 fresh or chilled sheep chines and/or best ends

Exports

In 2024, the value of UK sheepmeat exports continued to soar, marking a 6.6% increase and setting a new record high. This surge was primarily driven by a 13.3% rise in average price, as volumes saw a decline of 5.9% compared to the previous year.

Fresh lamb carcasses³⁴ remained the primary category for sheepmeat exports, despite the volume share decreasing slightly to 78.7%.

In March and April 2024, UK sheepmeat exports saw a notable volume decline compared to 2023, as the availability of sheepmeat for export was reduced during the Easter season. Export volumes built up towards the end of 2024, following the pattern seen in previous years.



34. HS020410 fresh or chilled lamb carcasses and half-carcasses

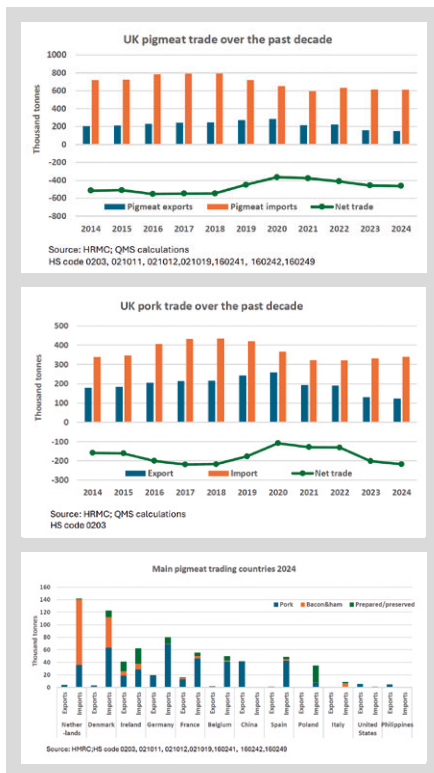
Pigmeat

Over the past decade, the UK has consistently been a net importer of pigmeat³⁵, including pork, bacon and ham, and prepared or preserved pigmeat. Historically, pigmeat imports have been approximately three times greater than exports. In 2024, this gap widened to over four times, primarily due to a significant decline in exports throughout the year.

Given more than 80% of pigmeat exports and more than half of pigmeat imports have historically consisted of chilled or frozen pork, pork represents the primary trading category. Over the past three years, pork imports have been increasing slightly, while pork exports have continued to decline, reaching a new low for the decade to 2024.

In 2024, 99.8% of pigmeat imports to the UK came from the EU. The Netherlands, as the top supplier, accounted for 23.1% of the UK's pigmeat imports, with 73.7% being bacon and ham.

As for exports, 58% of UK pigmeat went to the EU, while 42% was shipped to other regions. China remained the top destination for UK pigmeat exports, accounting for 27.6% of the total export volume, predominantly pork. Ireland was the second-largest destination for the UK pigmeat, representing 27.5% of total exports, with nearly 46% being pork.



UK pigmeat imports from the EU – 99.8% (product weight)

	Netherlands	Denmark	Ireland	Germany	France	Belgium
Export share	2.6%	2.1%	27.5%	12.7%	10.8%	1.1%
Import share	23.1%	20.0%	10.1%	13.0%	9.0%	8.1%
	China	Spain	Poland	Italy	United States	Philippines
Export share	27.6%	0.5%	0.2%	0.2%	3.6%	3.1%
Import share	0.0%	7.9%	5.7%	1.4%	0.2%	0.0%

35. Pigmeat imports are defined here as including Fresh and frozen pork (HS 0203), bacon & ham (HS 0210), and prepared or preserved pigmeat (HS 1602). In HS 0203, bone-in cuts converted from product weight to carcass weight using a factor of 1.11 and boneless cuts converted at 1.30. In HS 0210, bone-in hams and shoulders are converted at 1.30 and other products at 1.16. In HS 1602, conversion rates are 1.30 (Source: USDA – Livestock and Poultry World Markets and Trade)

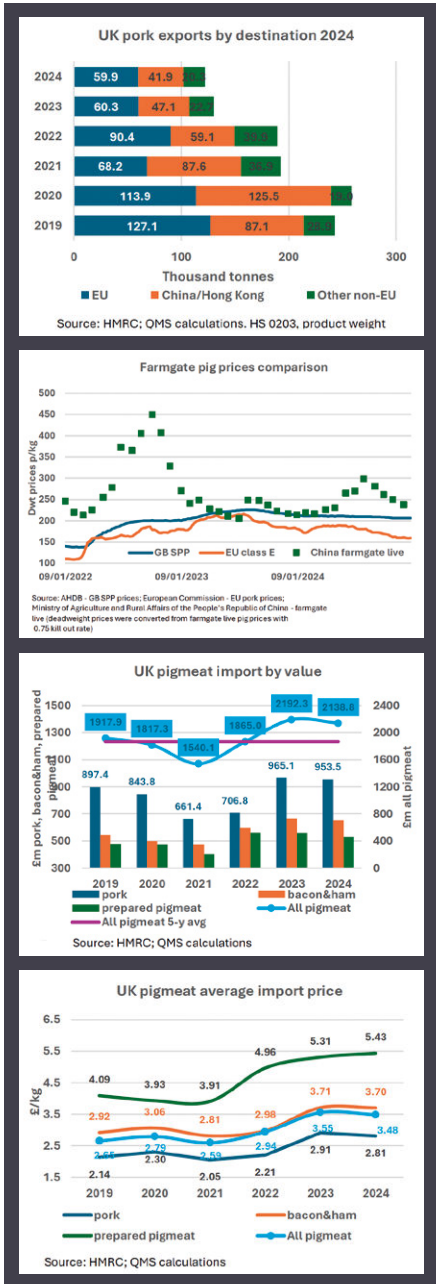
Pork exports to the EU, China/Hong Kong and other non-EU regions all declined in 2024, with the decrease being more pronounced in China/Hong Kong. China/Hong Kong's share fell from the previous year, dropping to 34%. More than three-quarters of China's imports from the UK were frozen pork boneless³⁶ cuts, while just over one-fifth were fresh pork carcasses³⁷.

In 2024, farmgate pig prices in China consistently remained above the GB Standard Pig Price (SPP), indicating potential export opportunities for UK producers. However, EU grade E pig prices were generally lower than the GB SPP, giving EU producers a competitive advantage in supplying pork to China.

Imports

The UK's pigmeat imports fell in 2024, decreasing by 2.4% in value and 0.5% in volume. This volume decline was attributed to reduced import levels of bacon and ham, as well as prepared/preserved pigmeat, while there was a 2.4% increase in pork imports.

In 2024, pork, the leading trade category, accounted for 56.2% of the UK's pigmeat imports in carcass weight, rising from 2023. Bacon and ham slid to 27%, while prepared or preserved pigmeat decreased to 16.8%. Fresh boneless³⁸ remained the top imported category, rising to 35% and still moving above its five-year average level.

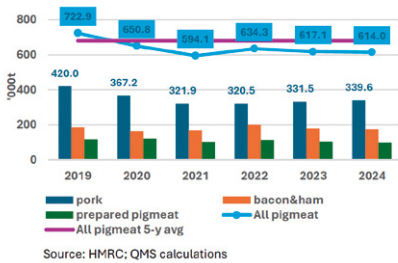


36. HS 020329 Frozen meat of swine (excl. carcasses and half-carcasses, and hams, shoulders and cuts thereof, with bone in)

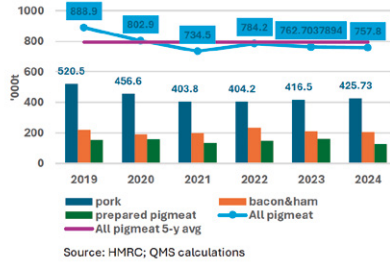
37. HS 020311 Fresh or chilled carcasses and half-carcasses of swine

38. HS 020319 Fresh or chilled meat of swine (excl. carcasses and half-carcasses, and hams, shoulders and cuts thereof, with bone in).

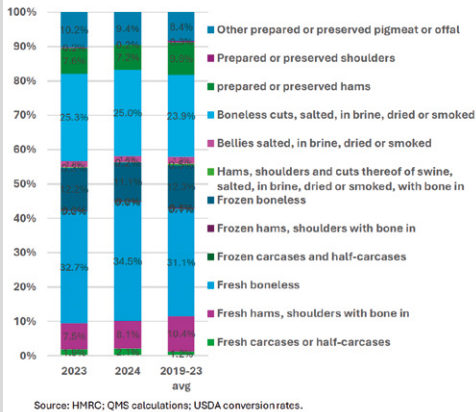
UK pigmeat import by product weight



UK pigmeat import by carcase weight



Composition of UK pigmeat imports in carcase weight equivalent



UK pigmeat exports 2024
150,072 tonnes

(-6.4% y/y)

Pork

(122,091t – 6.2% y/y)

Bacon & Ham

(10,281t – 23.3% y/y)

Prepared/preserved pork

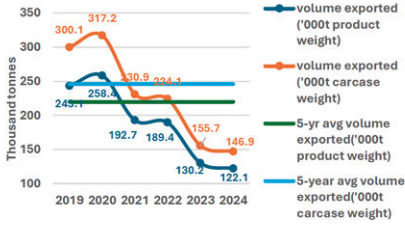
(17,701t + 4.9% y/y)

The UK's pork exports continued to decline for the fourth consecutive year in 2024, with a drop of 10.7% in value and 6.2% in product weight. The average export price fell as well, down by 4.8% to £2.05/kg. Prepared/preserved pork continued to grow in 2024, mainly from canned pork products³⁹.

Pork's share of the UK's exports declined to 80.8%, with prepared or preserved pigmeat rising to 12.7% and bacon and ham making up 6.6%. However, the proportions of frozen pork categories increased in 2024, particularly for frozen pork boneless.

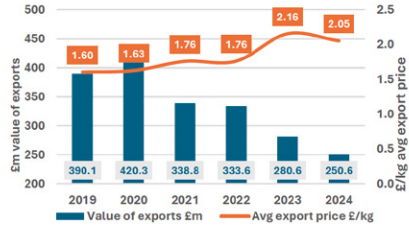
39. HS 160249 Prepared or preserved meat and offal of swine, incl. mixtures (excl. hams, shoulders and cuts thereof, sausages and similar products, finely homogenised preparations put up for retail sale as infant food or for dietetic purpose, in containers of a net weight of <=250g, preparations of liver and meat extracts and juices).

Annual UK exports of fresh and frozen pork by weight



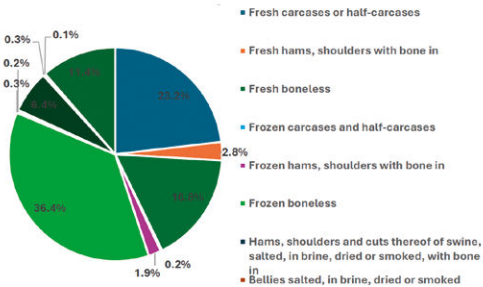
Source: HMRC; QMS calculations, HS code 0203.
Boneless cuts converted from product weight to carcass weight using USDA coefficients

Annual UK exports of fresh and frozen pork by value



Source: HMRC; QMS calculations, HS code 0203

Composition of UK pigmeat exports in carcass weight equivalent in 2024



Source: HMRC; QMS calculations
HS code 0203, 021011, 021012, 021019, 160241, 160242, 160249

Exchange Rate Movements

Shifts in exchange rates affect the competitiveness of Scotland's red meat at home and abroad. A stronger sterling tends to hinder exports because it reduces the sterling revenue from an unchanged euro price. At the same time, it reduces the relative price of imports, potentially reducing demand for domestic product in price sensitive market segments – most likely in foodservice and food manufacturing.

Sterling started 2024 in a weaker position against the euro but gradually strengthened throughout the year. This appreciation was supported by easing inflation and relative economic stability.

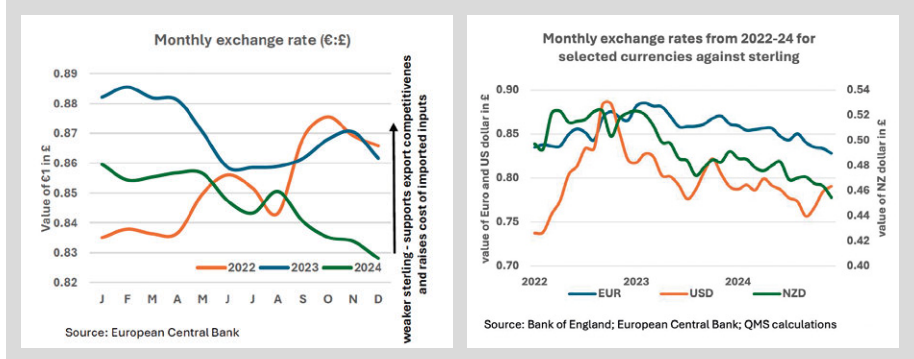
With the US dollar commonly used in international trade, its position against sterling can have significant influence on the competitiveness on UK red meat exports to markets outside the EU. Dollar weakness in 2024 may have softened UK returns on dollar-denominated exports to non-EU countries. However, on the other hand, it added to the downwards pressure on the price of many inputs.

Sterling became stronger against the New Zealand dollar in 2024, which supported lamb imports from the country.

Impact of exchange rate movements on import and export competitiveness

		Annual average exchange rate (value of €1 in £)	Return in £/kg to a UK exporter from an export price of €5/kg	EU export price needed to hold UK import price at £5/kg
2015	↓	72.6	3.63	6.89
2016	↑	81.9	4.1	6.1
2017	↑	87.7	4.38	5.7
2018	↑	88.5	4.42	5.65
2019	↓	87.8	4.39	5.7
2020	↑	89	4.45	5.62
2021	↓	86	4.3	5.82
2022	↓	85.21	4.26	5.87
2023	↑	86.98	4.35	5.75
2024	↓	84.68	4.23	5.9

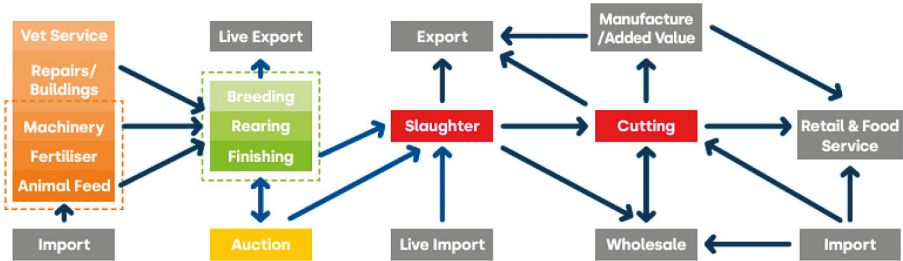
Source: ECB; QMS calculations



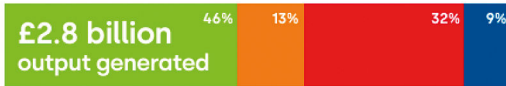
Useful Resources

Economic Impact of Scotland's Red Meat Sector

SUPPLY CHAIN



ECONOMIC IMPACT*



■ On-farm ■ Core Supplies ■ Meat Processors ■ Other Supplies



ON-FARM

- 31,200 workforce
- £1.3bn output at £41k per worker
- £504m GVA at £16k per worker



CORE SUPPLIES

- 2,000 workforce
- £361m output at £179k per worker
- £98m GVA at £49k per worker



MEAT PROCESSORS

- 3,880 workforce
- £885m output at £228k per worker
- £119m GVA at £31k per worker

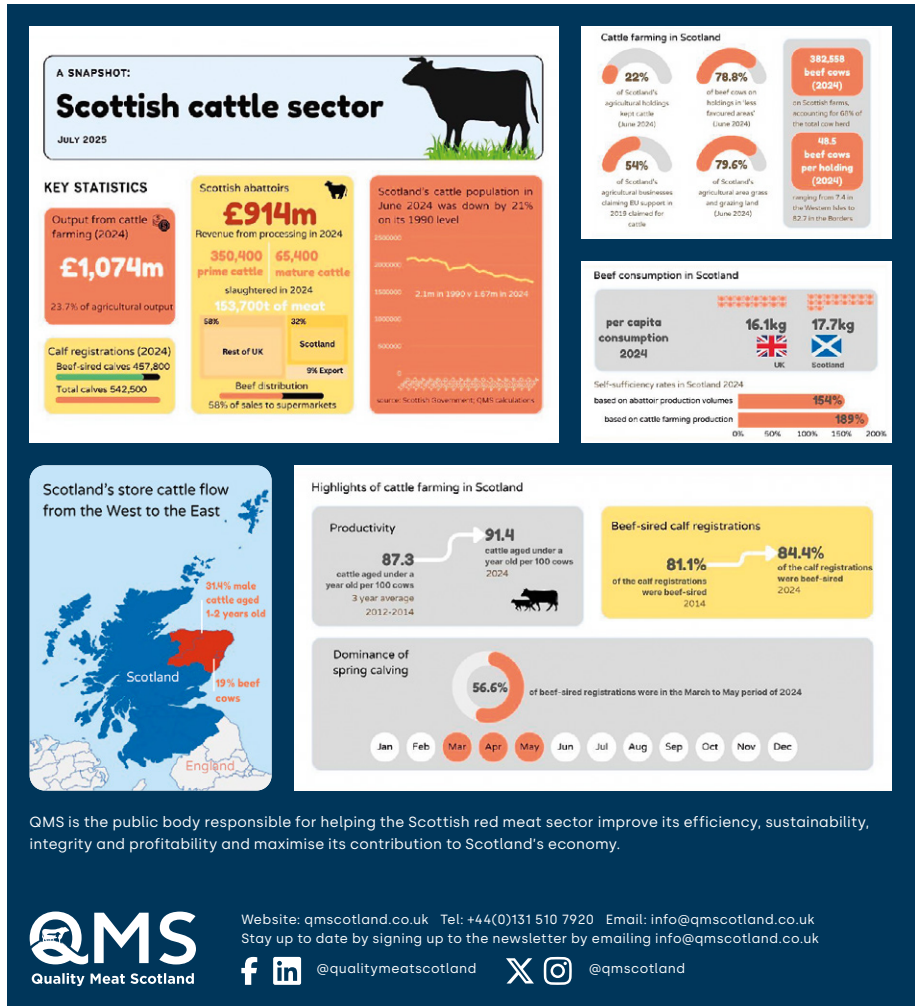


OTHER SUPPLIES

- 2,200 workforce
- £252 output at £114k per worker
- £118m GVA at £53k per worker

Source: Quality Meat Scotland; The Scottish Red Meat Sector Economic Impact Report 2023

Sector Snapshots in Scotland



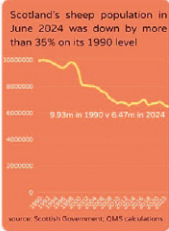
A SNAPSHOT:

Scottish sheep sector

JULY 2025



KEY STATISTICS



Sheep farming in Scotland



Sheep meat consumption in Scotland



QMS is the public body responsible for helping the Scottish red meat sector improve its efficiency, sustainability, integrity and profitability and maximise its contribution to Scotland's economy.

Website: qmscotland.co.uk
Tel: +44(0)131 510 7920
Email: info@qmscotland.co.uk

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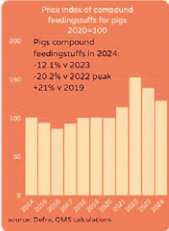
A SNAPSHOT:

Scottish pig sector

JULY 2025



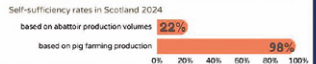
KEY STATISTICS



Pig farming in Scotland



Pig meat consumption in Scotland



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QMS Current Programmes



Monitor Farm Scotland Programme 2022 – 2026

The aim of the programme is to help to build resilient, dynamic farms focused on reaching full economic, social, and environmental sustainability, by optimising production.

The programme is led by QMS and AHDB.

For more information contact monitorfarm@qmscotland.co.uk



The Scotch Butchers Club

The Scotch Butchers Club positions butchers as the 'Champions of Scotch' promoting their skill, craftsmanship and knowledge to consumers via social media, the website and in-store point of sale. It offers members a host of enhanced benefits. It also proudly advocates butchery careers.

For more details, please get in touch on phone: 0131 510 7920

or email: sbc@qmscotland.co.uk



The Scotch Beef Club

QMS works closely with the food service sector to raise awareness and increase the understanding of Scotch Beef PGI, Scotch Lamb PGI and Specially Selected Pork.

Please get in touch via phone: 0131 510 7920

or email: info@qmscotland.co.uk



Farming Foodsteps

Farming Foodsteps is Quality Meat Scotland's interactive educational resource which explores the journey Scottish red meat makes from farm to fork and the role that red meat plays as part of a healthy, balanced diet and in the economy and environment.

Start exploring here <https://farmingfoodsteps.co.uk>



Make it Scotch

Scotland is one of the most sustainable and reputable places in the world to produce beef, lamb and pork.

Visit www.makeitscotch.com to discover more about the Scotch difference and to be inspired by our delicious recipes.



Baselining Project

QMS is working with AHDB to conduct a UK-wide baselining project that will gather accurate information on the levels of sequestration on farm. The project measures soil carbon, soil nutrients, and will use innovative technology to gather information on the GHG emissions that are captured by vegetation, trees, hedges, and crops.

For more information on the project, contact Bruce McConachie

bmcconachie@qmscotland.co.uk

Meating Our Potential

'Meating Our Potential' is a national partnership campaign led by Quality Meat Scotland and the Scottish Red Meat Resilience Group (SRMRG) to help grow Scotland's beef herd and strengthen our domestic food system to fill the widening supply gap. It's about small, attainable steps that add up – asking producers to add a couple more cows per herd each year over the next three to four years to meet future UK demand, reduce imports, and make the most of our underused processing capacity. The campaign brings together producers, processors, retailers, government, and consumers to build confidence, provide support, and grow a resilient, productive and profitable sector.

Find out more at: qmscotland.co.uk/industry-development/meatingourpotential



Quality Meat Scotland's Weekly Newsletter

By subscribing to our newsletter, readers have access to exclusive content straight to their inbox, informed about everything related to the sector.

From the latest QMS news to issues impacting the wider industry, receive expert analysis, development updates as well as the latest job vacancies.

Stay up to date by signing up emailing info@qmScotland.co.uk

The latest market prices can be viewed on the QMS website at: www.qmScotland.co.uk/markets-prices/



For more information on QMS
visit www.qmscotland.co.uk
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