Hybu Cig Cymru
Meat Promotion Wales

HCC Market Bulletin

May 2026

Following the latest release of data from Worldpanel by Numerator UK, this market bulletin looks at lamb consumption trends at GB retail during Easter 2026.

Glesni Phillips – Market Intelligence Executive

GROCERY PERFORMANCE AT EASTER

According to figures from Worldpanel by Numerator UK, Easter 2026 appears to have been characterised by cautious consumer spending, with shoppers still under financial pressure and actively seeking value. Take-home grocery sales grew modestly by 0.9% year-on-year during the two weeks ending 5 April 2026, while grocery inflation eased slightly to 3.8%, its lowest level since April 2025. However, consumers were heavily promotion-driven. Spending on promoted grocery products increased by 7.8%, while spending on full-price items declined slightly as promotions increased, showing that households were actively looking for deals and managing budgets carefully over the Easter period. Consumers still celebrated Easter, but did so selectively, using promotions and shopping around to manage costs.

LAMB AT EASTER

Primary red meat significantly outperformed both Total Grocery and the wider Meat, Fish and Poultry category in both value and volume growth, reinforcing the importance of roasting joints and celebratory meals during Easter trading. However, lamb emerged as one of the standout proteins during Easter. Lamb roasting volumes increased by 8.6% year-on-year, driven by higher shopper penetration and larger basket sizes. More households entered the category this Easter, while shoppers also bought larger volumes per trip. Lamb was heavily promotion-led, with over 64% of lamb roasting volumes sold on promotion, making it the most promoted roasting protein during the Easter period. Beyond roasting, lamb mince also performed particularly strongly, recording volume growth of 33.5%, suggesting consumers are increasingly looking for more versatile and affordable lamb meal occasions alongside traditional Easter roasts.

Compared with other proteins, pork delivered the strongest overall performance this Easter, with pork roasting volumes surged by almost 30% (supported by its accessible price point). Beef roasting also recorded positive volume growth of 8.5%; however, the category faced much stronger price inflation. In contrast, lamb prices remained relatively stable, increasing by only 6.3%, which may have helped support lamb's stronger seasonal appeal and value perception.

	Average price per KG	% change Y-o-Y
Chicken Whole	£3.22	- 4%
Beef Roasting	£13.11	+ 41%
Lamb Roasting	£10.71	+ 6%
Pork Roasting	£5.07	- 6%

LOOKING AHEAD

Insight from Worldpanel by Numerator suggests that the GB retail market in 2026 will continue to be shaped by ongoing cost-of-living pressures, convenience, health-focused purchasing and simpler meal choices. Shoppers are still financially cautious, with many continuing to trade down, seek promotions, buy more own-label products and reduce non-essential spending. Convenience is also becoming increasingly important, with shoppers making fewer shopping trips and favouring easier meal solutions, whilst health remains a major driver of food choices - particularly around high-protein, natural and functional foods.

Lamb is likely to face both opportunities and challenges within the wider red meat market during 2026. Ongoing financial pressure on consumers means higher-priced proteins remain vulnerable, particularly as shoppers continue to seek value. This could place pressure on everyday lamb consumption, especially for premium or larger roasting joints. However, lamb is also well positioned to benefit from trends such as growth in dining-in occasions, scratch cooking and affordable indulgence – all of which could support demand for lamb products that feel special but are still suitable for home preparation. Health trends around quality and high protein may also be of support, as there is growing consumer interest in high-protein and less-processed foods, whilst taste remains the key purchase driver.

What does this mean for industry?

This suggests continued opportunities around seasonal, premium and in-home dining occasions. However, ongoing cost-of-living pressures mean maintaining value perception will remain critical, with consumers likely to become increasingly selective about higher-priced meat purchases outside key celebratory occasions.

CATTLE

Prices – week ending 23rd May

The average deadweight prices in England and Wales for steers stood at **596.5p/kg**. This was:

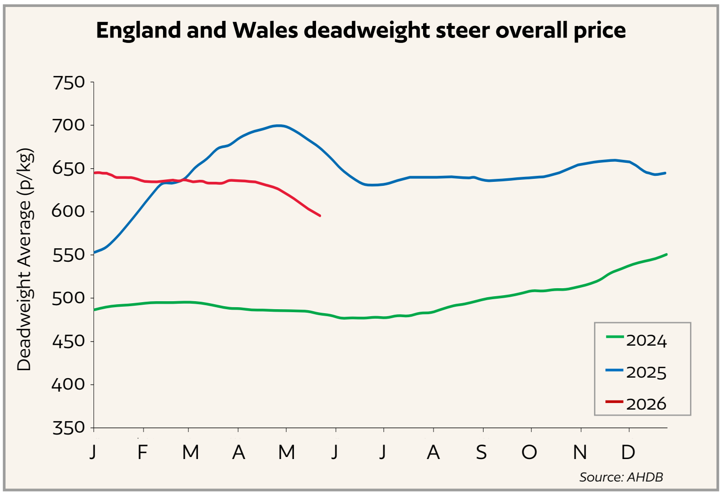
- -7.0p on the previous week,
- 78.1p below year-earlier levels.

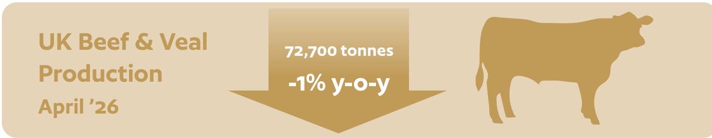
The deadweight prices for other cattle categories were as follows -

- Heifers: 595.0p/kg (-6.7p on the week),
- Young bulls: 579.4p/kg (-8.7p on the week), and
- Cull cows: 480.9p/kg (-6.6p on the week).

Throughput – April 2026

- Total cattle throughput at UK abattoirs = 214,800 head – down 4% on the year.
- Total prime cattle throughput = 163,800 head – down 4% on the year.
  - ➢ *steers -4%, heifers -5%, and young bulls +5%*
- Average prime cattle carcase weights = 355.3kg (+9.4kg on the year).
- Adult cattle throughput = 44,100 head – down 4% on the year.





SHEEP

Prices – week ending 23rd May

The deadweight* lamb price in GB averaged **944.1p/kg**. This was:

- +73.2p on the previous week
- +191.1p compared with year-earlier levels,
- 200.0p higher than the 5-year average (2021-25 average: 744.1p/kg).

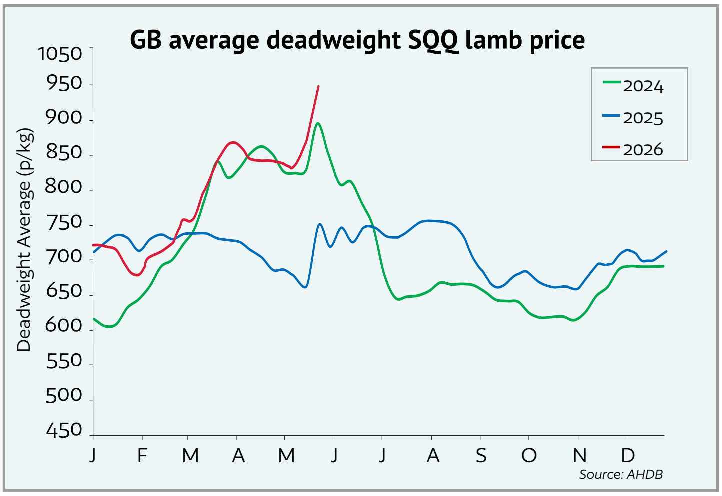
Numbers coming forward reached 17,100 head. This was:

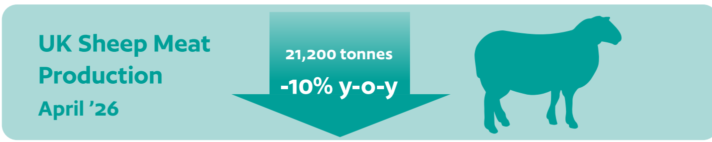
- -17% on the previous week
- +70% compared with year-earlier levels

**Note: Old season lambs are shown from 1 January to the third Monday in May and new season lambs thereafter.*

Throughput – April 2026

- Total sheep throughput at UK abattoirs = 942,100 head – down 12% on the year.
- Lamb throughput = 851,500 head – down 12% on the year.
- Average lamb carcase weights = 21.6kg (+ 0.2kg on the year).
- Cull ewe and ram throughput = 90,600 head – down 12% on the year.





PIGS

Prices – week ending 23rd May

The EU-spec Standard Pig Price (SPP)* in GB stood at **178.5p/kg**. This was:

- -1.1p on the previous week,
- - 28.2p compared with year-earlier levels,
- 21.8p higher than the 5-year average (2021-25 average: 184.8p/kg).

**Note: the APP is currently unavailable as the data does not meet validation thresholds. The SPP (which uses different data sources) is unaffected.*

Throughput – April 2026

- Total pig throughput at UK abattoirs = 910,200 head – up 4% on the year.
- Clean pig throughput = 891,700 head – up 3% on the year.
- Average clean pig carcase weights = 93.6kg (+3.5kg on the year)
- Sow and boar throughput = 18,500 head – up 16% on the year.