NFU Scotland

ShelfWatch

2025 mid-year report

Foreword

President Andrew Connon

Over the past six months, ShelfWatch has continued to provide vital insight into the sourcing practices of the eight major retailers in Scotland, focusing exclusively on own label products, with a particular emphasis on the availability and visibility of Scottish produce. Encouraging progress has been made in key categories such as milk, potatoes, eggs and beef with increased Scottish sourcing and a reduction in imported produce.

However, the report also highlights ongoing inconsistencies and concerns in areas like lamb, fresh vegetables, and some dairy products.

As summarised below in our key asks from earlier this year, this reporting period has focused on our first priority: increasing Scottish and British sourcing while reducing reliance on imports. ShelfWatch provides a vital benchmark to assess how retailers are delivering against that commitment.

While seasonality impacts availability, the data clearly shows that some retailers are leading the way in backing Scottish produce.

To deepen our insight and reflect growing concerns - particularly around imported meat and the seasonal nature of soft fruit - we introduced two new initiatives:

- A **soft fruit series**, tracking the availability of Scottish berries throughout the summer.
- A **meat audit**, examining reports of increased imports on shelves.

These additions have strengthened the robustness of our findings and provide a clearer, year-round picture of sourcing behaviours.

We remain committed to working collaboratively with retailers to ensure that Scottish farmers, crofters and growers are fairly represented on shelves across the country. ShelfWatch will continue to be a key tool to hold retailers accountable, celebrate progress, and push for greater transparency and consistency.

In the coming months, our focus will expand to the remaining asks - promoting Scottish produce, ensuring value and fairness, and improving labelling and in-store branding - ensuring a comprehensive approach to supporting Scottish agriculture.

Key Asks

1. **Improve Sourcing:** Prioritise Scottish produce across all commodities and reduce reliance on imports. Our goal is to see better Scottish sourcing levels compared to the 2024 ShelfWatch baseline.
2. **Promote and Champion:** Actively promote Scottish food in stores and online. We want a Scottish equivalent introduced to the 'Buy British' marketing campaigns. This will help champion local food production and increase consumer awareness of domestic products.
3. **Value and Fairness:** Avoid excessive discounting of food which undermines the value. We continue to advocate for fair pricing strategies that reflect the cost of production and ensure a sustainable future for farming and crofting.
4. **Clear Labelling:** Improve clarity on country-of-origin labelling and commit to working with us, UK Government and stakeholders to ensure consumers have accurate, transparent information.
5. **In-store branding:** Review store branding protocols to reduce co-mingling of domestic and imported goods. Ensure all signage is accurate and transparent for consumers.

Summary

Over the summer we have carried out two full audits, and two spot audits specifically looking at soft fruit and red meat. We looked at more than 70 stores of the eight major UK retailers (Aldi, Asda, Co-op, Lidl, M&S Food, Morrisons, Sainsbury's and Tesco).

Support for Scottish produce continues to vary by category. Milk, eggs and beef remain the strongest commodities for Scottish own-label sourcing. In contrast, chicken, pork and yoghurts are predominantly labelled as British, with limited Scottish representation.

Compared to earlier in the year, there has been a **3% increase in Scottish produce (now 19%) and 5% increase in British produce (now 66%)**. All retailers have increased their proportion of domestic sourcing – an expected trend reflecting, seasonal availability of fresh produce.

Compared to the same period last year, Scottish sourced products have increased by 3% and British by 2%, indicating modest but continued progress.

Aldi has consolidated its position as the strongest supporter of Scottish produce, with 41% of shelf stock now Scottish, a 7% increase since January 2025, and 6% year on year. Its British and Scottish combined sourcing for own-label products stands at an impressive 88%.

Sainsbury's continues to show the lowest proportion of Scottish produce, at 8%. However, this is a 2% increase year on year, and they remain the leading retailer for British-labelled produce overall.

Tesco has the highest volume of imported products, with 20% sourced from outside the UK, and 80% sourced domestically.

Retailer Performance

	Store	Jan-24	May-24	Sep-24	Jan-25	May-25	Aug-25	vs Jan 2025	YoY Diff
1	Aldi	48%	45%	35%	34%	38%	**41%**	7%	6%
2	Lidl	34%	27%	31%	27%	32%	**32%**	5%	1%
3	Co-op	21%	28%	25%	17%	22%	**27%**	10%	1%
4	M&S	16%	19%	18%	20%	19%	**21%**	1%	3%
5	Morrisons	21%	19%	16%	18%	20%	**17%**	-1%	1%
6	Asda	9%	12%	10%	11%	14%	**16%**	6%	6%
7	Tesco	8%	13%	12%	11%	14%	**14%**	3%	1%
8	Sainsbury’s	8%	10%	7%	7%	8%	**8%**	2%	2%
Average		**16%**	**18%**	**17%**	**16%**	**19%**	**19%**	**3%**	**3%**

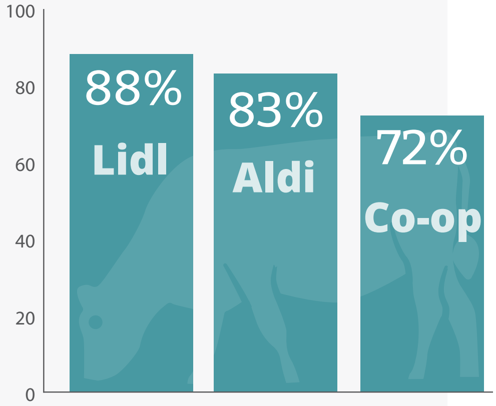
Table 1 Support for Scottish own-label products, August 2025.

	Store	Scottish August 2025	British August 2025	Combined August 2025	Combined Difference vs Jan 2025	vs May 2025
1	Aldi	41%	47%	88%	10%	2%
	Co-op	27%	61%	88%	7%	6%
2	M&S	21%	66%	87%	4%	2%
	Sainsburys	8%	79%	87%	7%	4%
3	Morrisons	17%	68%	85%	9%	1%
4	Asda	16%	67%	83%	9%	3%
5	Lidl	32%	49%	81%	13%	-3%
6	Tesco	14%	66%	80%	4%	1%
Average		**19%**	**66%**	**85%**	**7%**	**2%**

Table 2 Support for combined British & Scottish own-label products, August 2025.

Beef

Percentage of Scottish sourced own label beef



92% of SKUs were own label.

Scotch Beef remains a strong category, 54% of beef was Scotch, 43% was British, and 3% Irish. The retailers that had 100% Scotch and British, stocked a majority of Scotch rather than British beef.

In comparison, in January 2025, we have seen a marginal increase in Scotch since January (+3%) and Irish (+2%) meaning a slight decline in British (~5%).

However, Year on Year (YoY) there is a small decrease in Scotch beef and an increase in imported beef +1%. Despite reports of imported meats, our spot check audit during the summer did not find any evidence of imported beef from the southern hemisphere, imported beef was of Irish origin. This is something we will continue to monitor closely.

Lidl had the overall highest proportion of Scotch at 88%, but this is an 8% drop from earlier in the year with the shortfall being made up by British beef. While Sainsbury's had the highest proportion of British (87%), they had no Scotch beef at all and the highest proportion of Irish Beef +7% from January 2025 to 13%.

Lamb

Percentage of domestically produced own label lamb

28% Scotch

49% British

4% Australian

19% New Zealand

99% of SKUs were own label

28% of lamb was Scotch, 49% British, 4% Australian, and 19% from New Zealand. In comparison to January 2025, while the amount of Scotch has stayed the same, British lamb has reduced by 4%. Australian lamb has increased by 3%, and a 1% increase iin meat sourced from New Zealand.

Worryingly, YoY we continue to see a gradual trend towards imported lamb (+8%). Notably, retailers like Morrisons and Tesco, which previously did not stock imported lamb, are now gradually increasing their share of imports. Asda had the lowest level of Scotch and British lamb, stocking no Scotch lamb, just 18% British, and a concerning 82% imported, predominantly from Australia and New Zealand.

While Aldi and Lidl stocked 100% Scotch and British lamb during a snap audit in July, they have since dropped to 94% and 91% respectively in August, substituting with imported product. While Co-op has consistently stocked 100% domestic lamb and M&S has 100% since May 2025.

It is positive there has been no decline in Scotch since January 2025 and, due to seasonality, we would expect more Scotch lamb to be hitting the shelves in the coming months. However, the increase in Australian lamb is of concern and reflects the impact of the Australia/NZ trade deal.

Pork

Percentage of domestically produced own label pork

4% Scottish

85% British

12% EU

82% of SKUs were own label.

Support for Scottish Pork remains variable across the retailers. Aldi and Lidl are the only retailers supporting Scottish Pork, with 46% and 17% respectively.

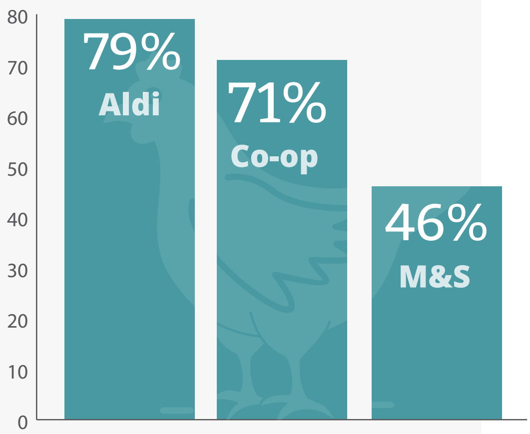
In August, on average, only 4% of pork on shelves was Scottish. However, during the same period, there was an increase in British pork (+16%) compared with January 2025. **YoY this represents an overall 17% increase in British pork and a direct decline in imported pork which is a positive.**

Across the year, Lidl has increased its Scottish Pork by 3% yet still import a significant proportion (35%). Whereas Aldi made the biggest decline in imported , down to, aligning with 100% domestic pork alongside Co-op and M&S.

Asda, Morrisons and Sainsbury's have all reduced imported pork since the beginning of the year, but still don't stock Scottish Pork. Meanwhile, Tesco has dropped Scottish pork and now imports more than a quarter of its pork (27%).

Chicken

Percentage of Scottish sourced own label chicken



99% of SKUs were own label.

All retailers continue to stock 100% domestic chicken, comprising 16% Scottish and 84% British. This reflects a marginal decline in Scottish chicken (-1%) when compared to January 2025.

Compared with last year, no retailer has increased the proportion of Scottish chicken, however several have increased their share of British chicken as a substitute for declining Scottish. However, we know that processing capacity does limit the availability of Scottish chicken.

Co-op recorded a 7% rise in Scottish chicken since January - bringing their Scottish share to 71%.

M&S, Morrisons (now 100% British), and Aldi all increased British volumes at the expense of Scottish-sourced products.

Despite a slight reduction, **Aldi continues to lead the way, with 79% of its chicken sourced from Scotland - followed by Co-op (71%) and M&S (46%).**

Fresh Veg

Percentage of domestically produced own label fresh veg

18% Scottish

67% UK

6% Spanish

9% Other

99.4% of SKUs were own label.

As it stands, fresh veg on Scottish shelves is made up of: 18% Scottish, 67% UK, 6% Spanish, 9% other. However, given seasonality, it's most appropriate to compare YoY. Worryingly there is a strong increase in imported vegetables (+8%), a very marginal increase in Scottish (+0.5%) and a general decline in British (-9%). This could be a result of the challenges with ongoing drought across the UK.

Asda and Tesco have 92% domestically produced veg followed by Sainsburys, Co-op and Morrisons (87%).

YoY Sainsbury's made the biggest improvement (+18%) for Scottish vegetables. Other retailers including Co-op, Lidl, Tesco and Asda also improved for Scottish produce. Morrisons was the only retailer to increase in British vegetables.

As noted, all retailers have increased reliance on imported vegetables (+8%) with Aldi (+23%) and Lidl (+21%) YoY. However, as of August 2025, Lidl has the highest volume of imported vegetables, at 43%.

Soft Fruit

Percentage of domestically produced own label soft fruit

39% Scottish

35% British

22% Other

3% Portuguese

96% of SKUs were own label.

During the most recent audit, fruit on Scottish shelves is made up of 39% Scottish, 35% British, 22% other and 3% Portuguese. When comparing YoY, this is a marginal improvement for Scottish (+2%) however a reduction for British and an increase in imports.

Unsurprisingly, strawberries were the most prominent Scottish berry, (average 66% Scottish), followed by raspberries (average 33% Scottish) and blackberries (40% Scottish) across the soft fruit series (May 2025, July 2025, and August 2025).

During peak summer (July 2025), Lidl (58% Scottish, 40% British), Aldi (71% Scottish, 22% British) and M&S (33% Scottish, 60% British) all led the way in terms of combined totals. While Morrisons and Asda lagged with less than 60% domestically produced products. However this was heavily weighted with Scottish berries (48% and 39% respectively).

Across the series, for average imports, **Aldi and Lidl had the lowest proportion of imported fruit at 23% and 24% respectively, while Tesco, Morrisons and Asda have an average in excess of 40% imported fruit.** We are limited in the comparisons we can draw, given the soft fruit series is new for 2025.

Potatoes

Percentage of domestically produced own label potatoes

44% Scottish

51% British

6% Imported

The latest audit shows potato sourcing comprises 44% Scottish, 51% British and 6% imported produce. This is +4% in Scottish and British respectively and -8% for imported vs January 2025. Compared with last year this is a 14% increase in Scottish and a drop for both British (-9%) and imported (-5%). However, it is worth noting, the 2025 audit now only records white potatoes so the YoY differences may reflect the removal of sweet potato.

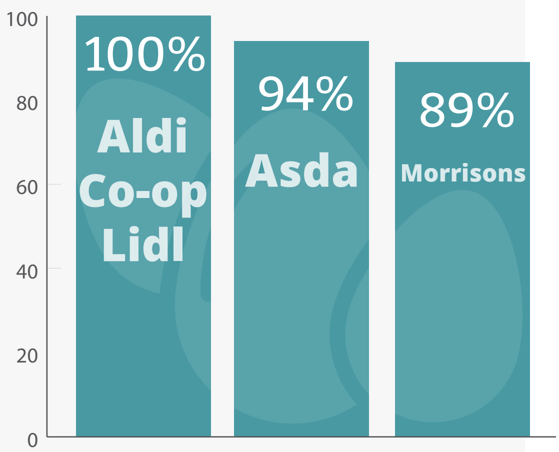
Aldi (100%), Asda (98%), Lidl and Sainsbury's (75%) led the way in terms of Scottish support for potatoes. And although Morrisons and Tesco have 0% Scottish, they do have 100% British potatoes.

Since January, **all retailers increased their Scottish potatoes, Co-op has led the way at +35%, excluding Tesco and Morrisons** who have switched to 100% British. YoY Asda made the biggest improvement increasing to 97% Scottish potatoes, while M&S was the only retailer to have imported potatoes in the most recent audit.

85% of SKUs were own label.

Eggs

Percentage of Scottish sourced own label eggs

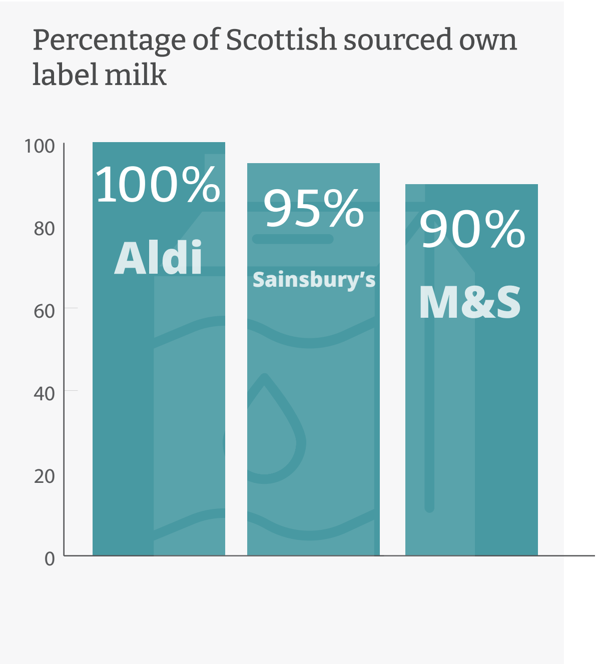


Scottish eggs remain well represented, making up 77% of stock, with British making up the remaining 23%. This is a very marginal drop from earlier in the year (-0.7%) but overall, +1% YoY. **Aldi, Co-op and Lidl all have 100% Scottish, with Asda at 94% and Morrisons at 89%.**

YoY M&S and Sainsburys increased their Scottish eggs by 11%, which now means Scottish eggs account for 70% and 11% respectively. Tesco has also increased 8% since earlier in the year.

57% of SKUs were own label.

Fresh Milk



59% of SKUs were own label.

The proportion of Scottish own label milk continues to rise, with all retailers increasing the proportion of Scottish milk from earlier in the year. YoY comparisons can't be drawn due to changes in the auditing process.

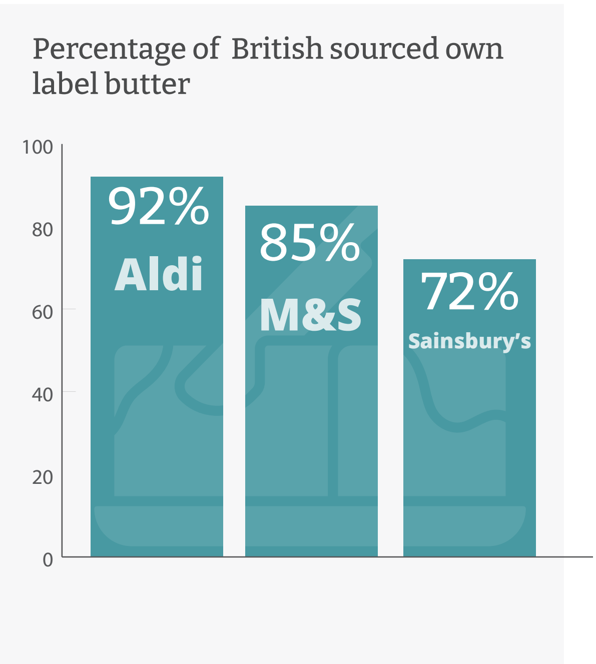
On average for August 2025, considering own label products, 83% were Scottish and 17% were UK. For conventionally produced milk (i.e. non-organic), 89% was labelled as Scottish +6% from earlier in the year.

Aldi continues to stock 100% Scottish milk, followed by Sainsbury's at 95%. At the other end of the spectrum, Co-op had 67% Scottish milk (-4% from earlier in the year).

Morrisons increased its Scottish milk by 20% this year, with almost three quarters of its milk coming from Scotland.

Notably, all retailers stocked a majority Scottish Milk, British milk accounted for less than a third.

Butter



23% of SKUs were own label.

Availability of Scottish own label butter remains very poor and, in general, sales of UK own label butter have increased slightly in the last six months.

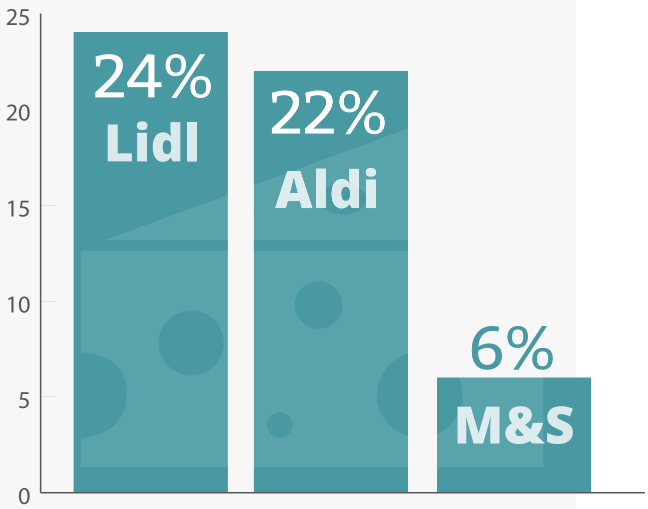
On average, in August 2025, no products were labelled as Scottish; 73% were labelled as UK, 1% was imported and 26% as non-dairy spreads. YoY this is an increase for British butter (+5%), and reduction in Scottish (-3%) and imported butter (-2%).

YoY Aldi has dropped any Scottish butter, but now leads with 92% British butter, followed by M&S (85%) and Sainsbury's (72%).

The Co-op imports the most butter at 50% which is +13% from earlier in the year.

Cheese

Percentage of Scottish sourced own label cheese



53% of SKUs were own label.

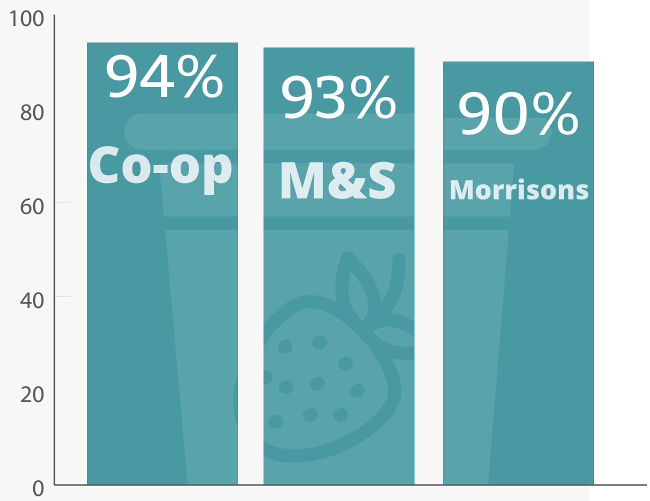
On average in August 2025, 4% of products were Scottish and 66% were UK, 30% of own label cheese was imported. This is virtually identical to the results from earlier in the year, however it is a 2% increase for Scottish cheese in comparison with last year.

Lidl stock the most Scottish Cheese (24%), while Sainsbury's stock the highest volume of domestic cheese at 75% - this is all British labelled cheese.

No own label cheese in Tesco, Sainsburys, M&S or Asda was identified as Scottish. The lowest overall proportion of Scottish and UK own label cheese was Tesco at 60%.

Yoghurts

Percentage of UK sourced own label yoghurt



24% of SKUs were own label.

No own label yoghurt was identified as Scottish but, in general, sales of UK produced own label yoghurt have grown over the last eight months, with imports decreasing.

On average for August 2025, no products were labeled as Scottish, 87% were UK, 13% of own label yoghurt was imported. YoY this is +6% for UK yogurts.

Support for UK yoghurts was relatively strong; the Co-op had the highest proportion of UK own label yoghurt (94%). While Lidl had the lowest proportion at 81%, however this is a notable 32% increase from earlier in the year.

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