



SHELFWATCH PHASE 1
SUMMARY REPORT
FEBRUARY 2024

Introduction

On behalf of farmers and crofters, NFU Scotland is undertaking the largest ever survey of Scottish supermarket shelves, shining a light on how and where Scottish produce is being made available to buy.

Knowing that Scottish consumers want to source local produce, the survey will celebrate and recognise good practice on supermarket shelves while identifying those stores where more can be done. It will highlight how consumers and retailers can build their support the amazing produce from our Scottish farmers and crofters.

This document presents the outline results from Phase One. On the Union's behalf, an independent research firm visited 71 stores across Scotland in late January. Researchers looked at beef, lamb, pork, chicken, potatoes, vegetables and dairy products (milk, cheese, butter and yoghurt) on offer in Tesco, Asda, Morrisons, Sainsbury's, Co-op, Marks and Spencer, Lidl and Aldi stores. It looked at the country of origin of the goods being offered, identify if they are Scottish, British or imported.

This is the first of four Shelfwatch surveys to be carried out on behalf of NFU Scotland in the next 12 months.

Primary producers provide all of society with the one thing that we cannot do without, which is food. However, securing a fair return from the marketplace, whilst carrying all the risk, remains a real challenge for farmers and crofters.

This survey gives us a fantastic opportunity to not only hold our retailers to account and highlight to our consumers what is going on in some shops, but also give credit to those who are tremendous supporters of local food production within Scotland.

The results of this survey give us a platform for future discussions with supermarkets on responsible treatment of suppliers and guaranteed delivery of a fair price to producers for the food they produce.

Martin Kennedy



President, NFU Scotland

Summary

1. The shelfwatch took place in February across eight retailers on mainland Scotland (Aldi, Asda, Lidl, Tesco, Sainsburys, Marks and Spencer, Morrisons, Co-Op).
2. The purpose of the shelfwatch is to provide a picture of how retailers are supporting Scottish producers.
3. Shelfwatch took place across 71 stores on mainland Scotland.
4. This shelfwatch only covers own-branded products, shelfwatch phase 2 will also include own branded products.
5. Soft fruit is not included in the results due to seasonality.

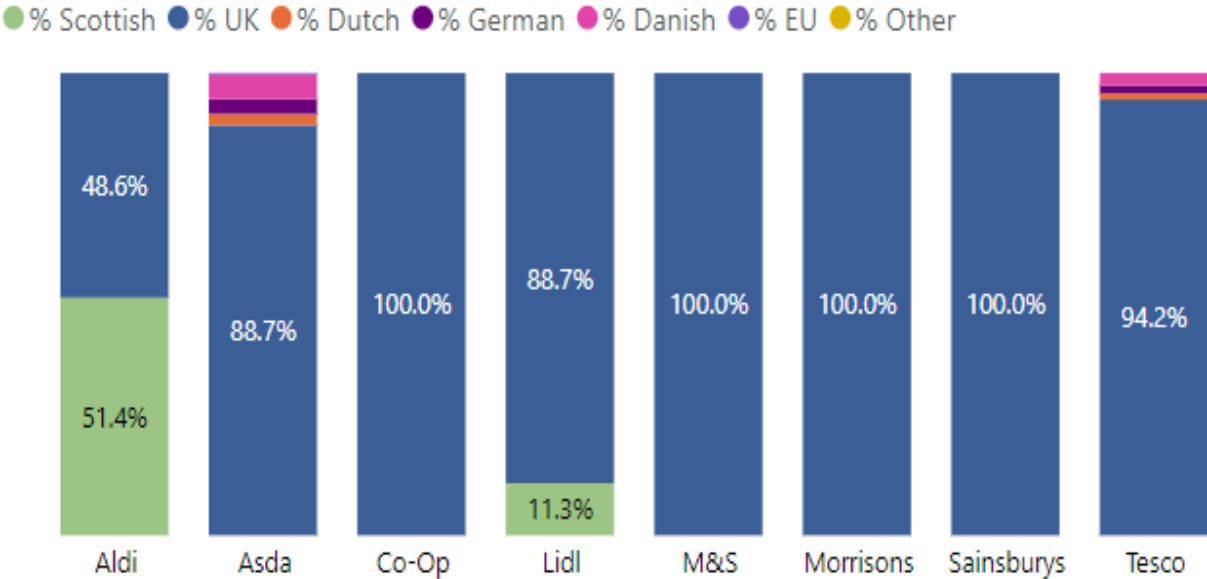
Pork

The pork shelfwatch included fresh pork, bacon, and sausages.

- Aldi had the largest percentage of Scottish with 51.4%.
- Aldi was the only retailer to stock fresh Scottish pork (100%).
- Two retailers (Aldi and Lidl) stocked Scottish bacon.
- Aldi and Lidi were the only retailers to stock Scottish sausages.
- Six retailers had no Scottish pork.
- Most of the non-Scottish pork was UK.
- Asda and Tesco have imported fresh pork (Asda 33% and Tesco 17.3%)

The table below amalgamates all three segments (fresh pork, bacon, and sausages).

Own Label Distribution Breakdown by Storegroup & Origin

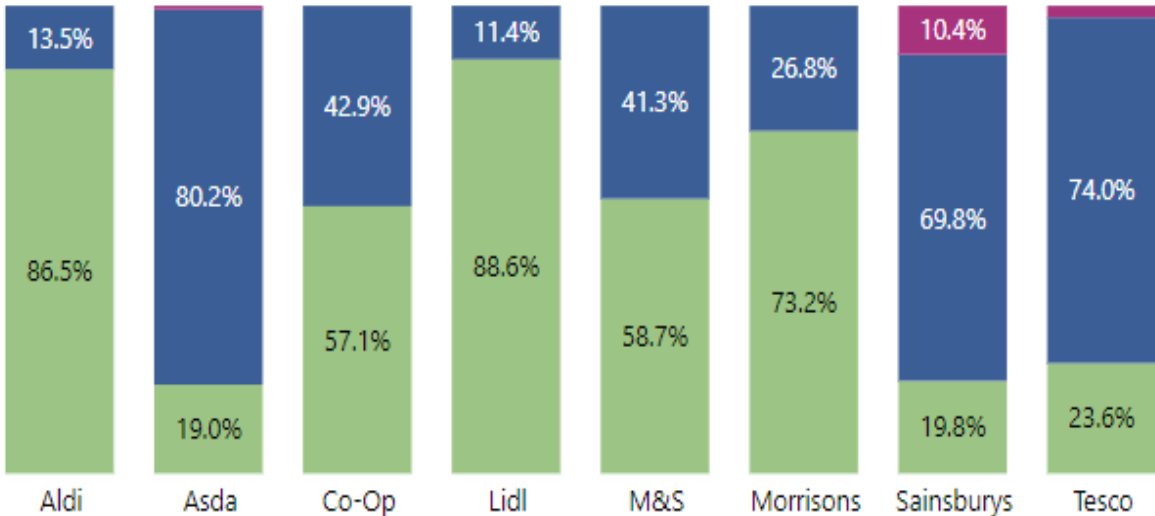


Beef

- Lidl had the largest percentage of Scottish beef (88.6%).
- Aldi, Lidl and Morrisons had more than 70% of Scottish beef.
- Asda had the lowest levels of Scottish beef (19%).
- The largest volume of produce came from UK.
- Tesco and Sainsburys stocked Irish beef, the largest was Sainsburys with 10.4%.

Own Label Distribution Breakdown by Storegroup & Origin

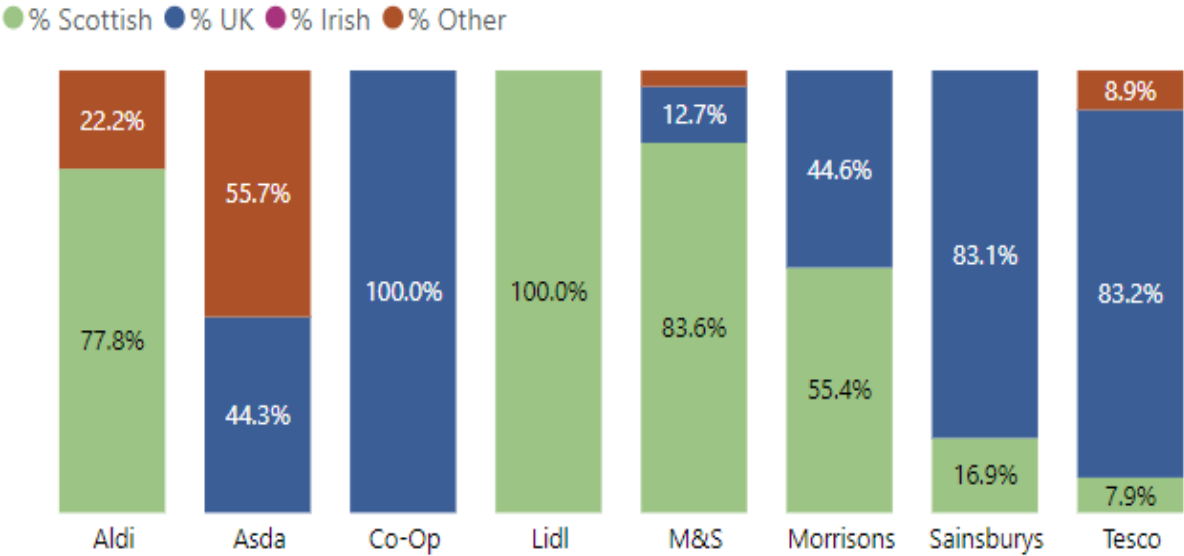
● % Scottish ● % UK ● % Irish ● % Other



Lamb

- Lidl had the largest percentage (100%) Scottish lamb followed by M&S (83.6%).
- Two retailers (Asda, Co-Op) had no Scottish lamb.
- Four retailers had 'other'- the largest was Asda (55.7%). 'Other' is imported products.

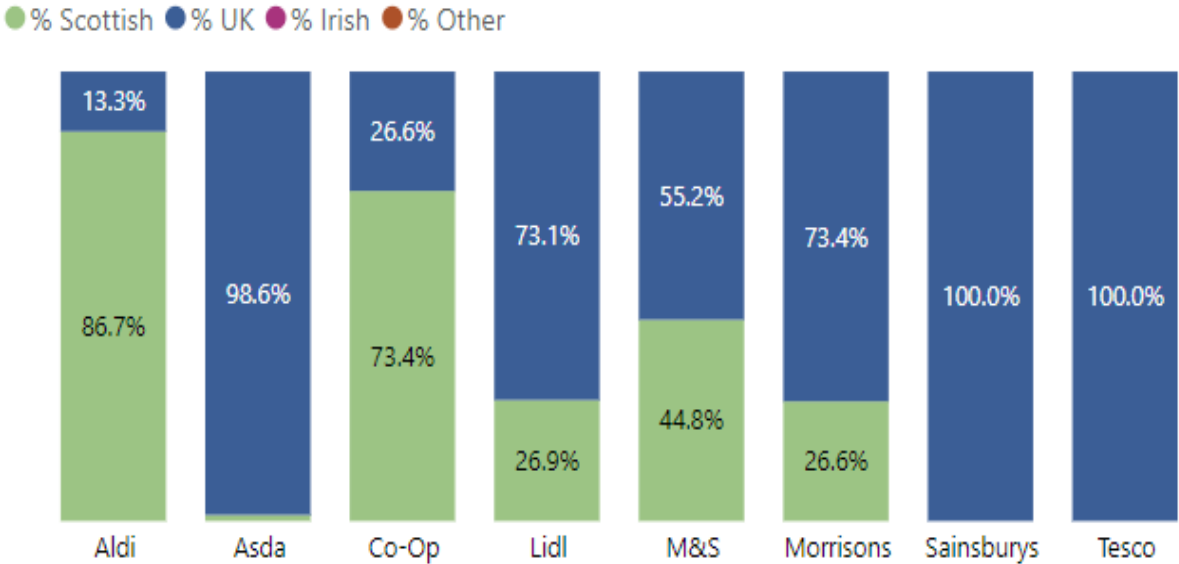
Own Label Distribution Breakdown by Storegroup & Origin



Chicken

- Aldi had the largest percentage (86.7%) of Scottish chicken.
- Two retailers, Tesco and Sainsburys, had no Scottish chicken. Asda had 1.4%.
- The largest amount of chicken was UK.

Own Label Distribution Breakdown by Storegroup & Origin

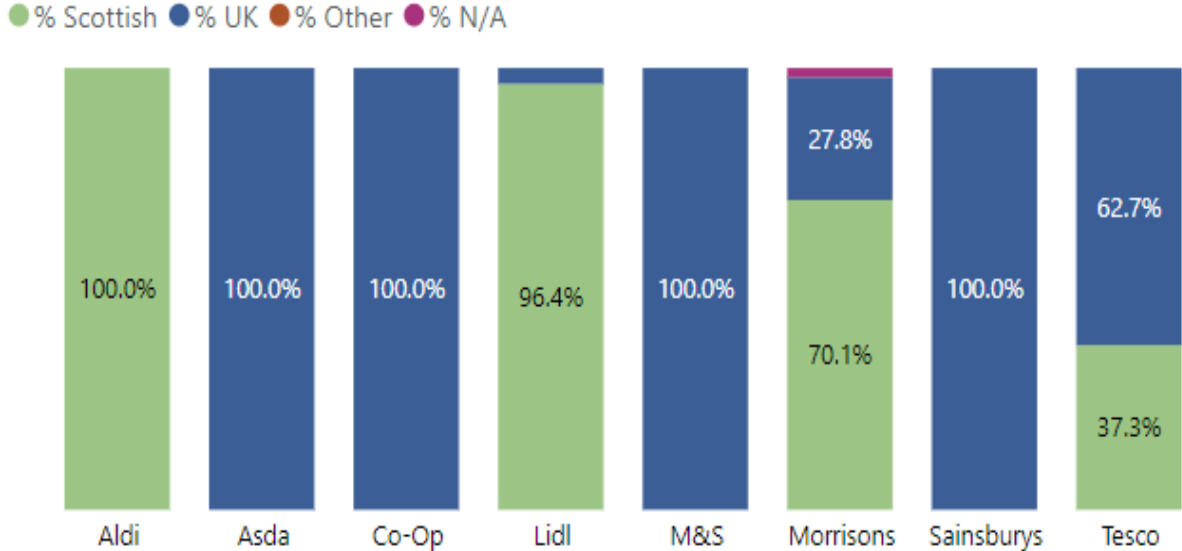


Eggs

This includes free range and organic eggs.

- Aldi had the largest percentage (100%) Scottish eggs.
- Four retailers-Asda, Co-Op, M&S, Sainsburys had no Scottish eggs.
- Morrisons have a small number of 'N/A' eggs-these are from caged eggs which don't have an origin label.

Own Label Distribution Breakdown by Storegroup & Origin

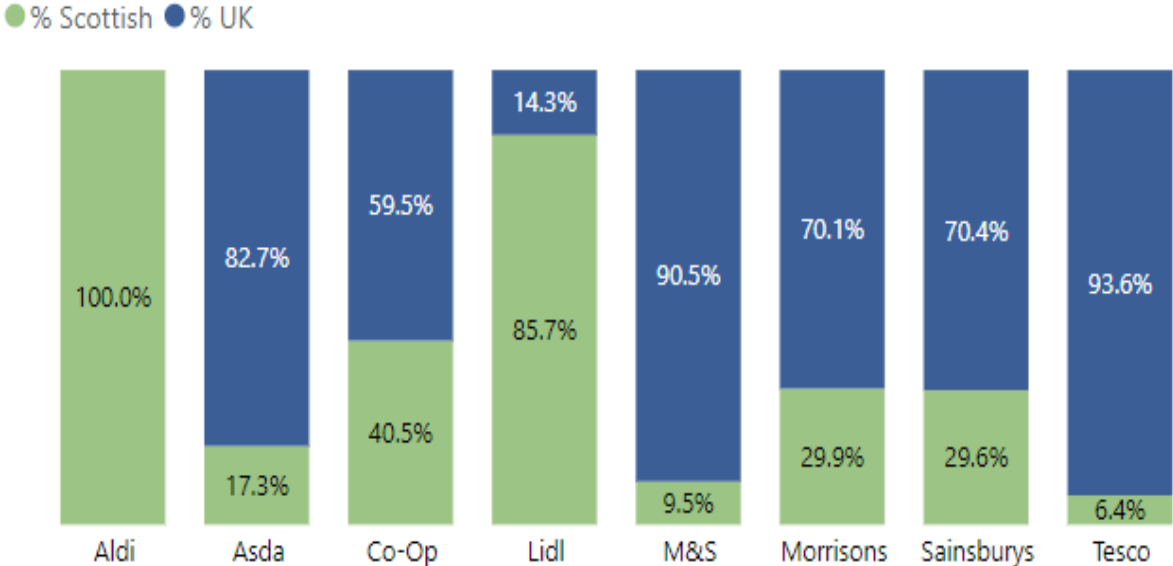


Potatoes

This covers fresh potatoes-processed are excluded.

- Aldi had the highest amount (100%) Scottish potatoes.
- Tesco had the lowest percentage (6.4%) of Scottish potatoes.
- Five retailers (Asda, M&S, Morrisons, Sainsburys, Tesco) had less than 30% Scottish potatoes.

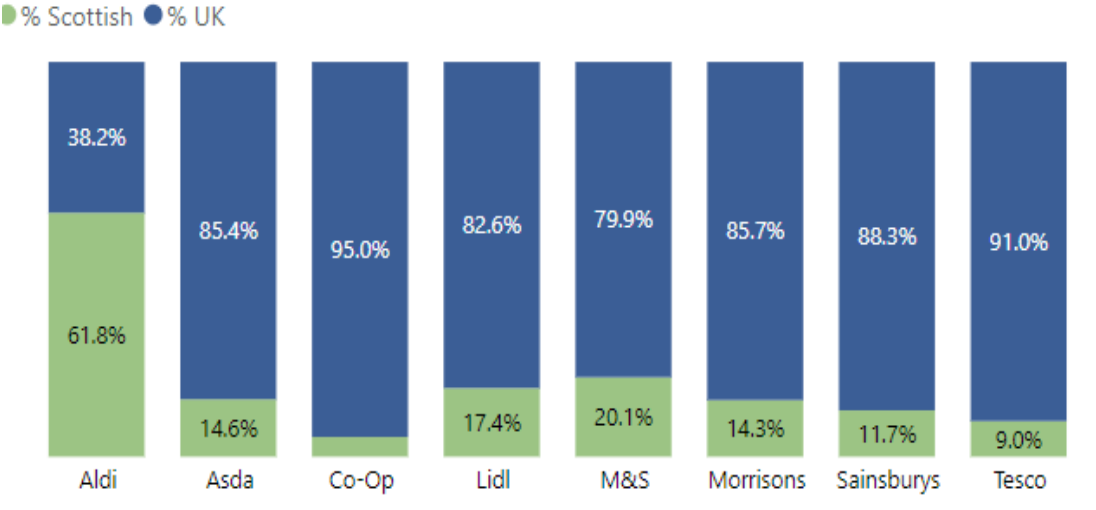
Own Label Distribution Breakdown by Storegroup & Origin



Vegetables

- Aldi had the highest percentage (61.8%) of Scottish vegetables.
- Co-Op had the lowest (4.8%).
- The highest amount of vegetables is UK.

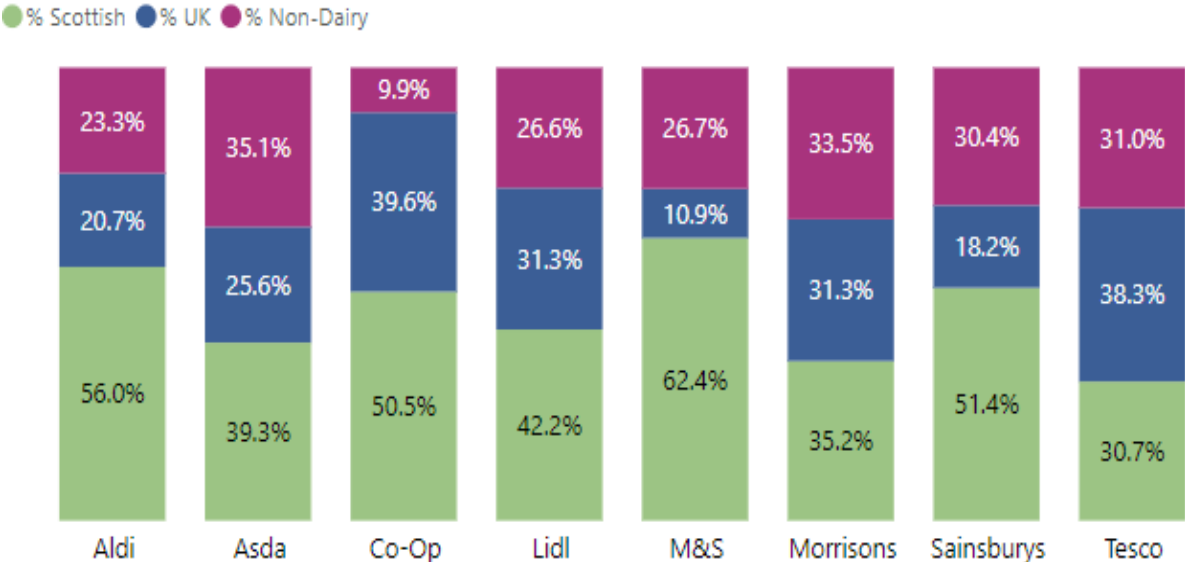
Own Label Distribution Breakdown by Storegroup & Origin



Milk

- M&S had the largest amount of Scottish milk (62.4%)
- Morrisons had the lowest (35.2%).
- All retailers have milk coming from the UK.
- All retailers are stocking 'non-dairy' milk-Asda are the highest at 35.1% and Co-Op are lowest at 9.9%.

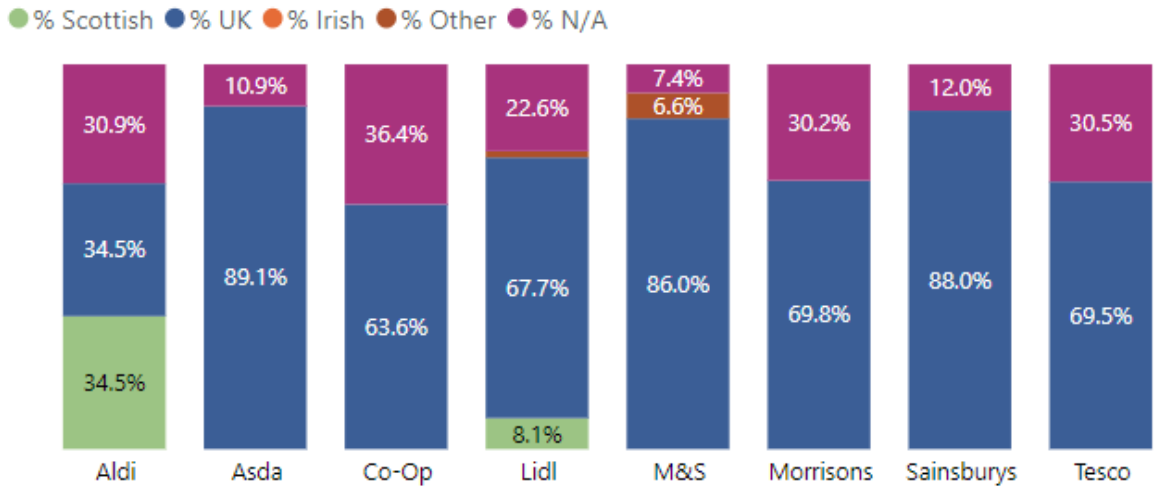
Own Label Distribution Breakdown by Storegroup & Origin



Butter

- Aldi has the highest amount of Scottish butter (34.5%).
- Only two retailers (Aldi and Lidl) have Scottish butter.
- Most butter is UK.
- 'Other' is spreads/not block butter.

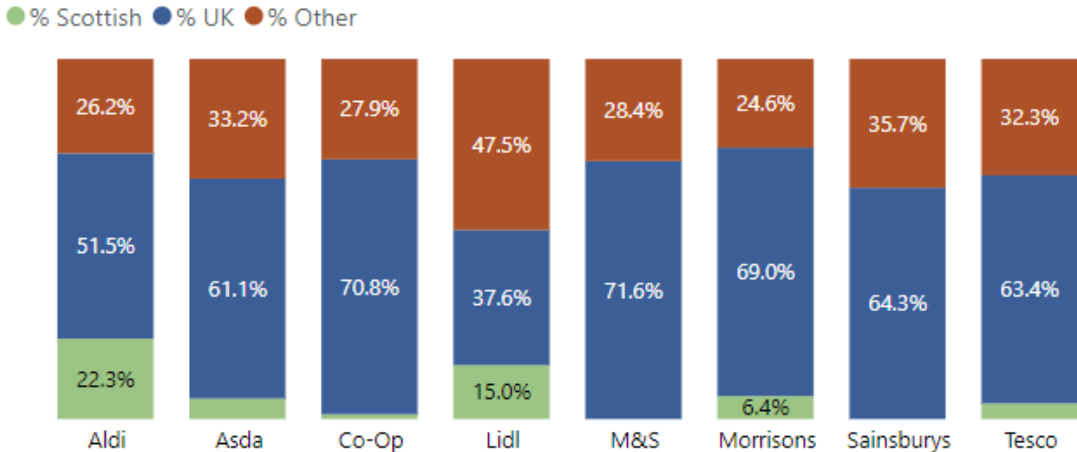
Own Label Distribution Breakdown by Storegroup & Origin



Cheese

- Aldi has the highest amount of Scottish cheese (22.3%).
- M&S had no Scottish cheese.
- The largest amount of cheese stocked was from UK.

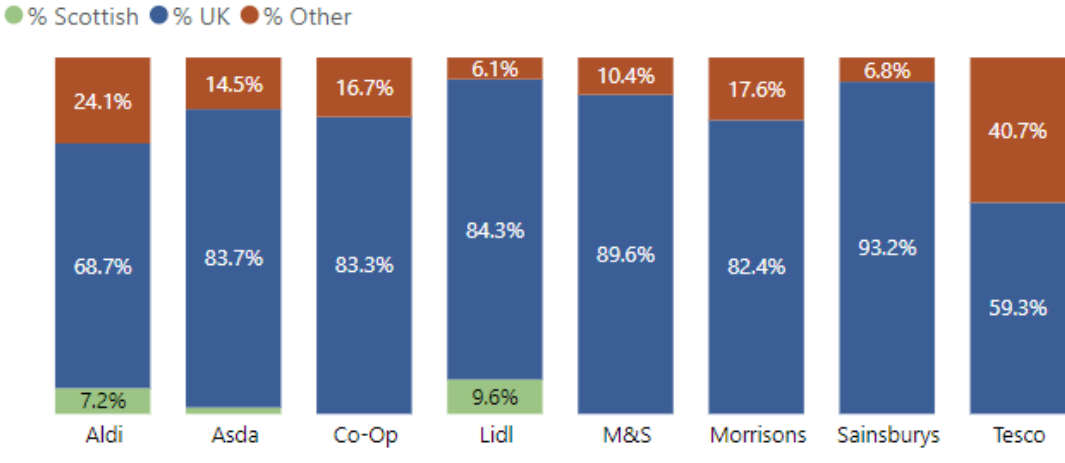
Own Label Distribution Breakdown by Storegroup & Origin



Yoghurt

- Lidl has the highest Scottish yoghurt at 9.6%.
- Five retailers (Co-Op, M&S, Morrisons, Sainsburys, Tesco) have no Scottish yoghurt.

Own Label Distribution Breakdown by Storegroup & Origin



Conclusion

- There is a mixed picture of support for Scottish across the retailers.
- There is strong support for British.
- Aldi has the largest percentage of Scottish overall (48.7%).
- Sainsbury’s has the lowest percentage of Scottish overall (7.6%).
- Three retailers (Asda, Tesco and Sainsburys) have less than 10% Scottish overall.
- Fresh pork and lamb are being imported. The highest pork import is Asda with 33% of fresh pork. The highest lamb import is Asda with 55%.

