NFU Scotland

Shelf Watch

Year in Review: 2025-26

Presidential Foreword

President Andrew Connon

On behalf of Scotland's farmers and crofters, I am pleased to present the latest findings from NFU Scotland's ShelfWatch initiative. As the challenges facing food producers continue to intensify - from volatile input costs, market instability and import pressures to animal health challenges and uncertainty around future policy - transparency and fairness within retail supply chains have never been more important.

ShelfWatch provides vital, independent insight into what consumers are actually finding on supermarket shelves. By monitoring origin, sourcing and labelling across major retailers, this initiative offers an objective snapshot of how sourcing decisions vary by retailer, commodity and season.

Encouragingly, this Annual Report shows progress in several key areas. Support for Scottish produce remains strong in sectors such as eggs, fresh milk, potatoes and chicken, with a number of retailers demonstrating sustained or improving commitment to Scottish and British sourcing.

Notably, the results show that Aldi continues to perform strongest overall for Scottish produce, and Co-op has improved to number one for domestic produce. This reinforces that a consistent, long term approach to sourcing can deliver higher levels of Scottish availability across multiple product categories.

However, the findings also highlight ongoing concerns. In some categories, Scottish sourcing remains limited or inconsistent, while emerging import trends risk undermining producer confidence and the value attached to Scotland's high production standards. The variation seen across retailers reinforces the importance of our continued scrutiny and sustained engagement.

By acting on these asks, retailers can demonstrate meaningful support for Scottish agriculture and help build a fairer, more resilient food system - one that delivers for farmers, consumers and the wider rural economy alike. NFU Scotland remains committed to using ShelfWatch as a constructive tool to support this shared objective and looks forward to continuing this vital dialogue.

NFU Scotland continues to call on retailers to act in **five key areas:**

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 our baseline audit.
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, the 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

Scotland's farmers and crofters continue to deliver high-quality food to some of the highest standards in the world. But our latest ShelfWatch audit reveals that this commitment isn't always matched by what appears on supermarket shelves.

This latest analysis shows a notable improvement in Scottish sourcing, but much of this is due to changes in our methodology, following feedback from our commodity committees. These changes include a more targeted approach across the dairy sector, with a focus on cream and cheddar cheese, which better reflects Scottish production. We have also included cooked ham to help assess retailer support for the Scottish pig industry.

As a result of these changes, direct year-on-year comparisons are not possible, but the results still provide a clear sense of the direction of travel.

Where comparisons can be drawn, support for Scottish-sourced produce has improved, particularly in sectors like eggs, milk, and potatoes. But progress remains uneven and, in some areas, worryingly slow. On average, just **26% of own-label products** across the major UK retailers in Scotland are of Scottish origin. While Aldi leads the way at 65%, others, including Tesco, Asda and Sainsbury's, continue to rely heavily on imports, undermining both producer confidence and domestic supply resilience.

This most recent audit covered 78 stores across Scotland, assessing over **20,000 own-label products** including beef, lamb, pork, chicken, eggs milk, cheese, cream, butter, fresh vegetables and soft fruit.

Some troubling patterns emerged. Imported lamb rose sharply, and Scottish pork remains underrepresented, with retailers continuing to stock products from Europe or label items as "mixed origin", adding to consumer confusion.

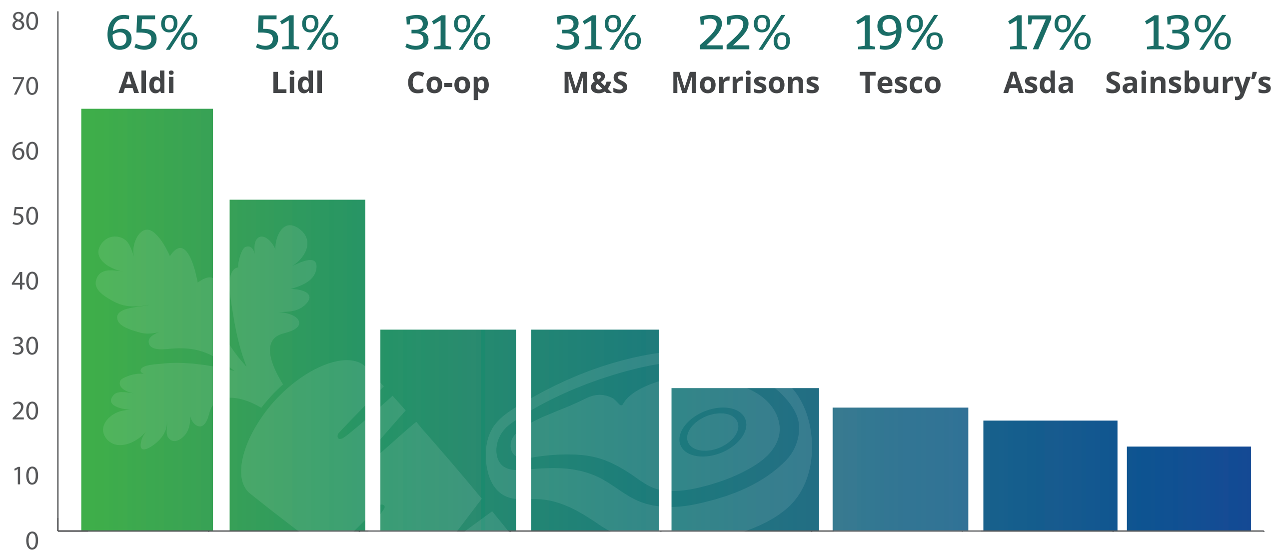
Conversely, Scottish sourcing improved in several categories where retailers made deliberate choices - showing what's possible with consistent commitment to domestic produce.

The findings reinforce NFU Scotland's five retail asks: prioritise Scottish sourcing, promote local produce, avoid damaging deep discounting, improve labelling clarity, and prevent the co-mingling of Scottish and imported products through transparent branding.

ShelfWatch remains a critical accountability tool, highlighting where retailers are delivering and where more must be done to underpin a commitment to ensure Scottish agriculture receives proper recognition and fair reward. It provides a robust evidence base to support constructive engagement with retailers and policymakers alike.

In 2026, as pressures on the supply chain grow and policy reform accelerates, we urge retailers to step up. Consistent, transparent sourcing practices are not just good for farmers, they are essential for Scotland's food security, consumer trust, and the resilience of our rural economy.

Retailer Performance



Graph 1 Support for Scottish own label products.

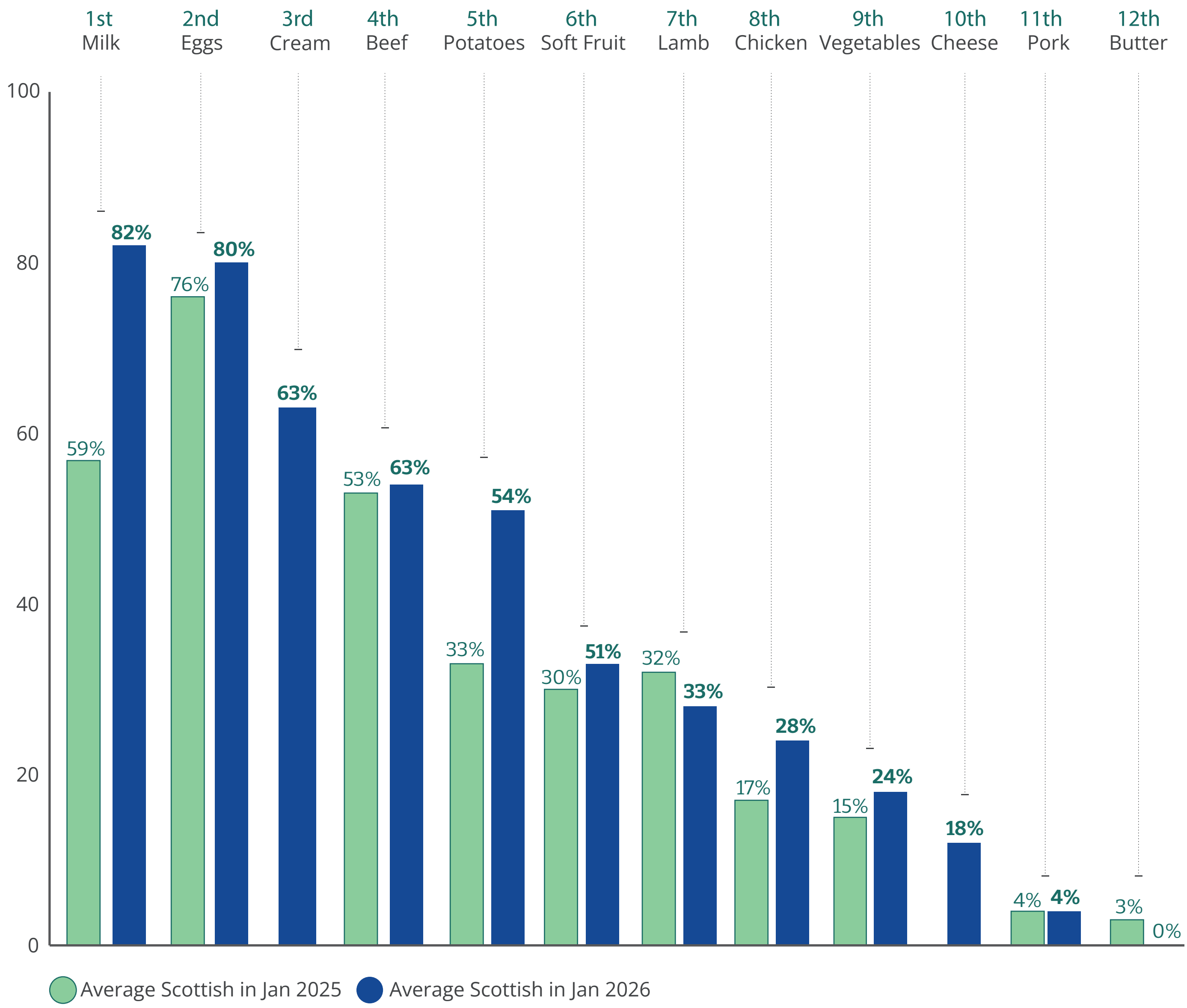
Average Combined Performance for January 2026

	Store	Jan-26 Scottish	Jan-26 British	Jan-26 Combined Total
1	Co-op	31%	68%	**99%**
2	Aldi	65%	33%	**98%**
3	M&S	31%	64%	**95%**
4	Sainsbury's	13%	80%	**93%**
5	Lidl	51%	41%	**92%**
6	Tesco	19%	65%	**84%**
7	Morrisons	22%	62%	**84%**
8	Asda	17%	60%	**77%**
Total		**26%**	**62%**	**88%**

Table 1 Support for combined British & Scottish own label products.

	Store	Average imports
1	Co-op	1%
2	Aldi	2%
3	M&S	4%
4	Sainsbury's	7%
5	Lidl	7%
6	Tesco	16%
7	Morrisons	17%
8	Asda	23%
Average		**12%**

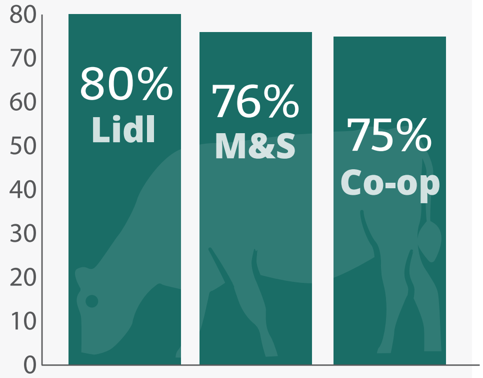
Table 2 Proportion of imported products as per January 2026 audit.



Graph 2 Commodity ranking by average Scottish with comparisons where applicable.

Beef

Retailer Performance: % of Scotch Beef



96% of products were own label.

In 2025, the beef sector had an unprecedented surge in prices. Despite tightening supplies driven by strong UK demand for cattle, Scotch Beef remained the most likely origin beef on shelves, accounting for 54% of all beef – a 3% increase on the previous year.

Lidl continue to have the largest percentage of Scotch beef, though this share declined compared to this time last year. However, Lidl substituted this with British Beef, while other retailers turned to imports. Sainsbury's increased its Irish beef offering by 6%, 3% of Morrison's steaks were from Australia, and 5% of Asda's were from Uruguay. This is the first time ShelfWatch has recorded imported beef from the southern hemisphere – a concerning precedent we have raised directly with retailers given the potential impact on consumer trust and producer confidence.

These findings reinforce the critical importance of ongoing monitoring through ShelfWatch, and they highlight the urgency of our calls for clear labelling, transparency and standards of imported products.

Lamb

Origin breakdown of own label lamb

28% Scotch

54% UK

14% New Zealand

4% Australian

99% of products were own label.

Compared to last year, there has been a slight decrease in both Scotch and imported lamb, with a marginal increase in British lamb. Lidl continues to lead the way with the highest proportion of Scotch lamb at 92%, although this represents an 8% drop versus last year. Aldi showed the most significant improvement, increasing its Scotch lamb offering by 43%, bringing them in line with M&S, with 81% Scotch.

M&S has now joined Co-op in removing imported lamb from its shelves entirely – a notable change, as imported lamb previously represented 5% of M&S's range. In contrast, Asda continues to have the highest proportion of imported lamb at 72%, while Morrisons and Sainsbury's have increased their imports by 13% and 12% respectively.

The sheep sector saw strong trade throughout 2025, with stable prices supported by slower throughput towards the end of the year. A seasonal uplift in December was observed, but lower slaughter volumes compared to 2024 may have tightened domestic supply, potentially impacting availability on shelves.

Pork

Origin breakdown of pork categories:

4% Scotch

73% British

9% EU

14% Mixed origin

The UK pig sector faced continued challenges throughout 2025, with lower processing volumes and intense market competition driven by extremely low European prices and favourable exchange rates, making imports an attractive option for some retailers. To strengthen our monitoring, ShelfWatch has expanded its pork audit this year to include cooked ham, broadening the range of pork products we assess. Furthermore, we have added a new “mixed origin” category to better capture products with unclear labelling – a key concern for consumer transparency.

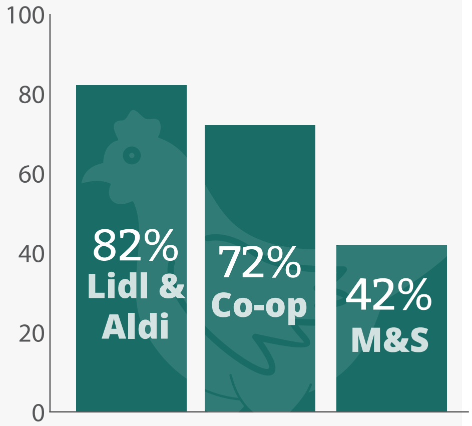
Scottish pork representation remains largely unchanged since January 2025 (+0.1%), though results vary by product.

- Sausages saw no imports, 9% were Scottish and 91% UK
- In contrast, only 3% of bacon was Scottish, with 61% British (+15% vs last year) and 26% was either EU or mixed origin

Aldi and Lidl continue to be the main supporters of Scottish pork, with 41% and 20% respectively. Tesco also offers a small proportion of Scottish ham and bacon (5% and 3% respectively). Co-op, M&S and Sainsbury’s are the only retailers not importing pork products,while Asda stands out for importing 49% of its pork products – the highest among the major supermarkets.

Chicken

Retailer performance: % of chicken that is Scottish



100% of products were own label.

Retailers continue to stock only domestically produced chicken, which remains a positive baseline at **23% Scottish chicken** on average. However, it's especially encouraging to see a significant rise in Scottish chicken on shelves this year. This is primarily driven by Lidl's introduction of Scottish chicken, which now accounts for 82% of their offering. Co-op has also made progress, increasing its Scottish chicken share by 8% compared to last year.

This uplift is welcome news for a sector that continues to face a multitude of challenges, including the ongoing threat of avian influenza and uncertainty around future processing capacity.

On the other hand, M&S recorded the largest year-on-year decline in Scottish chicken, down 23%, while Aldi dropped 10% in the same timeframe. That said, Aldi's numbers have started to recover, with a 3% increase since the last audit in August 2025.

Vegetables

Origin breakdown of own label Vegetables

18% Scottish

55% UK

19% Spanish

8% Other

100% of products were own label.

Aldi stocked 55% Scottish produce and 36% British, giving a combined domestic total of 91%. Co-op had the highest domestic sourcing overall, with 87% British produce, and 10% Scottish produce, resulting in a 97% total from the UK.

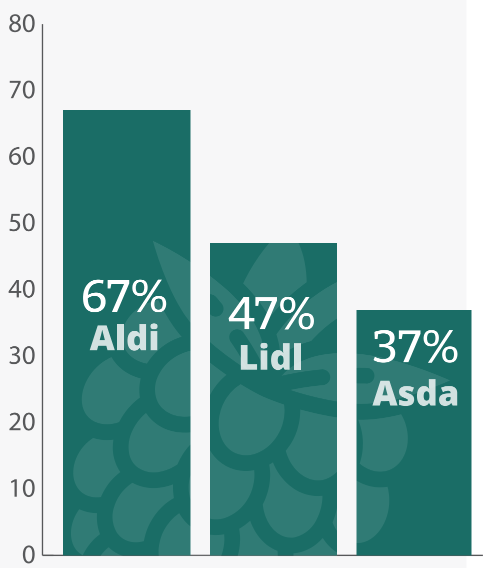
All retailers improved the volume of Scottish produce, with the exception of Lidl, which saw a 9% drop. Half of that reduction was replaced with imported product. Asda and Co-op made the biggest improvement in Scottish-sourced vegetables, each improving by 10%.

Compared to last year, on average there was a 3% increase in both Scottish and imported produce, while British sourced produce (excluding Scottish) fell by 6%. Carrots were the most likely vegetable to be Scottish (46%), followed by parsnips, sprouts, swedes and leeks – all of which were 100% domestically produced.

Tesco had the highest increase in imported vegetables, up 10% versus last year, while Lidl continues to stock the highest overall volume of imports at 38%. The sharpest import rises were in kale (+25%), onions (+8%) and cabbage (+5%). However, there was also an increase in the Scottish volumes of these products, suggesting a shift away from British-labelled produce.

Soft Fruit

Retailer performance: % of soft fruit that is Scottish



96% of products were own label.

While we don't audit soft fruit out of season, our soft fruit ShelfWatch series will resume during the 2026 peak season.

As a reminder, last year's soft fruit series (audited three times across the summer) found that, on average, 33% of soft fruit on shelves was Scottish, 30% British and 37% was imported. These figures fluctuated across the season and by the fruit. During the peak summer weeks, domestic sourcing peaked at 73%, showing strong local supply when in season.

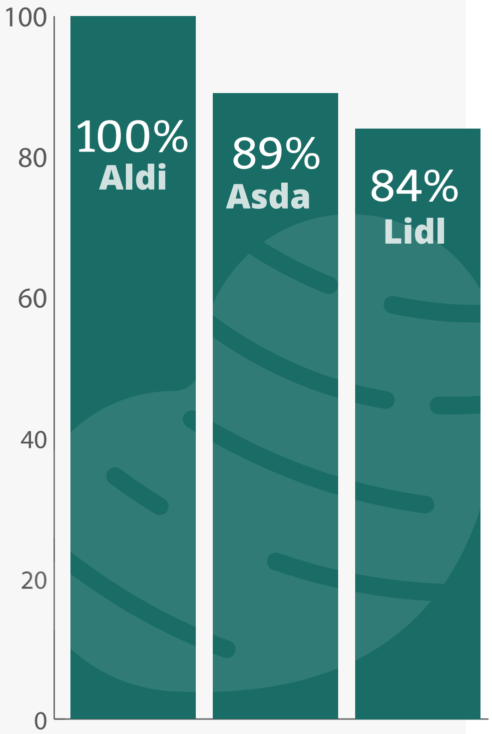
At that time, Aldi (71%) and Lidl (58%) led the way in Scottish soft fruit, while Tesco, Morrisons and Asda relied more heavily on imports for the majority of their soft fruit offering.

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).

Despite seasonal progress, the horticulture sector continues to face major uncertainties - from the ongoing pressure around access to reliable labour, the cost of climate adaption and an increasing audit burden. These challenges will make 2026 another testing year for growers.

Potatoes

Retailer performance: % of potatoes that are Scottish



88% of products were own label.

More Scottish and UK potatoes were on shelves in January 2026, compared to the same time last year, up 11% and 2% respectively. This increase reflects the high supply of UK and Scottish potatoes following large carry-over of stocks from 2024 and a large 2025 crop.

Across most retailers, Scottish potatoes made up the majority, with a notable 11% increase year-on-year. At the same time, imports fell sharply, by 13%.

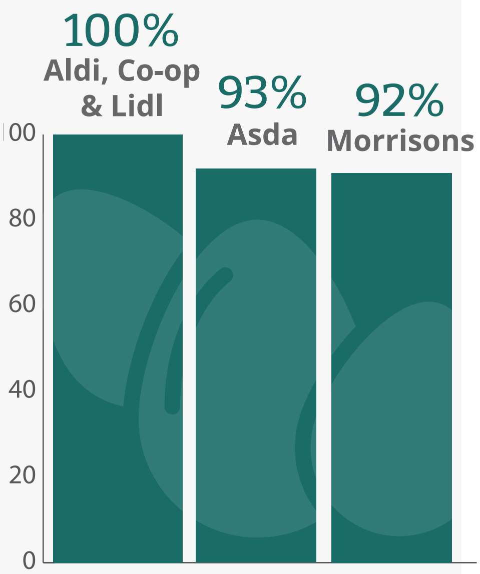
- Aldi now stocks 100% Scottish potatoes
- Co-op recorded the biggest improvement year on year (+43%)
- Tesco, which previously didn't stock Scottish labelled potatoes, introduced Scottish labels in 2025 – now making up 25% of their range
- M&S is now the only retailer still importing potatoes

In terms of pricing, as of January 2026, Scottish potatoes were 4% cheaper than UK origin potatoes and 12% cheaper than imported potatoes. This trend has persisted over 2025, except for August 2025 when UK potatoes were briefly cheaper due to high carry-over stocks.

While it is encouraging to see more Scottish and British potatoes on shelves, the reality for growers remains difficult. Conditions are getting drier every year, and groundwater levels across the UK remain worryingly low. Scotland is in a better position than much of England, but significant investment is still required to ensure a resilient supply in future.

Eggs

Retailer performance: % of eggs that are Scottish



Scottish eggs are performing well, with 80% of eggs on Scottish shelves sourced from Scotland – an increase of 5% year on year. Retailer performance across 2025 has been relatively stable, with only minor fluctuations, likely due to ongoing challenges with avian influenza across the UK.

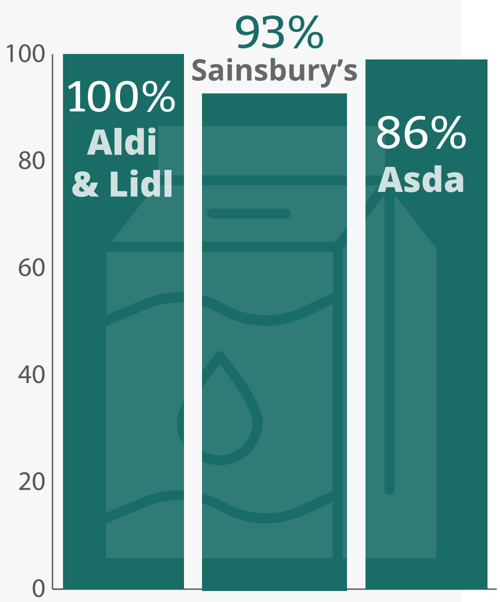
Most retailers saw year on year increases:

- M&S made the biggest improvement (+26%)
- Tesco also showed notable gains (+9%)
- Sainsbury's reintroduced Scottish eggs in January 2026, after having none at the same point last year - albeit in a small proportion (8%)

While Scotland has been less affected by avian influenza than other parts of the UK, this may explain some of the positive trends in Scottish sourcing. However, with recent avian influenza cases emerging in Scotland, we may see some impact on availability as we move further into 2026.

Fresh Milk

Retailer performance: % of fresh milk that is Scottish



62% products were own label.

Support across all major retailers for Scottish and British fresh milk is at the highest level to date. The percentage of Scottish own-label fresh milk in stores increased by 7% year on year, reflecting strong domestic sourcing.

On average, 82% of fresh milk was Scottish and 19% British.

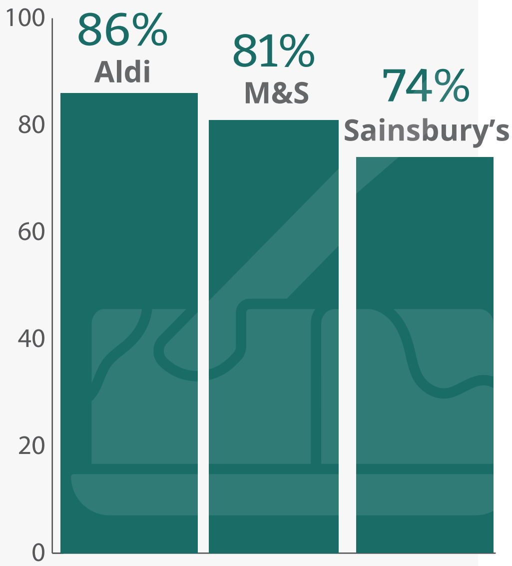
Morrisons recorded the largest year on year increase in Scottish milk, up 21%, meanwhile Co-op saw a shift, substituting13% Scottish milk for British, bringing its Scottish average down to 59%.

While farmgate milk prices have fallen steeply since September 2025, producers on fresh milk contracts aligned with major retailers have been partially protected from the worst of the cuts.

ShelfWatch data shows the average price for fresh non-organic milk in January 2026 fell by 2p per litre versus August 2025. Meanwhile the average price for fresh organic milk was up 6p in the same time period, demonstrating growing demand for organic and 'gold top' or Jersey milk. These trends highlight the importance of differentiated products in supporting farmgate prices and the need for strong backing from retailers for Scottish dairy.

Butter

Retailer performance: % of butter that is Scottish



23% of products were own label.

Availability of Scottish own-label butter remains very poor. Despite a general improvement in domestic sourcing, with UK own-label butter increasing by 5% in the last 12 months and a corresponding 5% decline in imported butter, Scottish-labelled butter is still absent from the shelves.

As of January 2026, there was no Scottish own-label butter available in store. This is primarily due to Aldi removing Scottish butter, resulting in a 29% drop compared to last year.

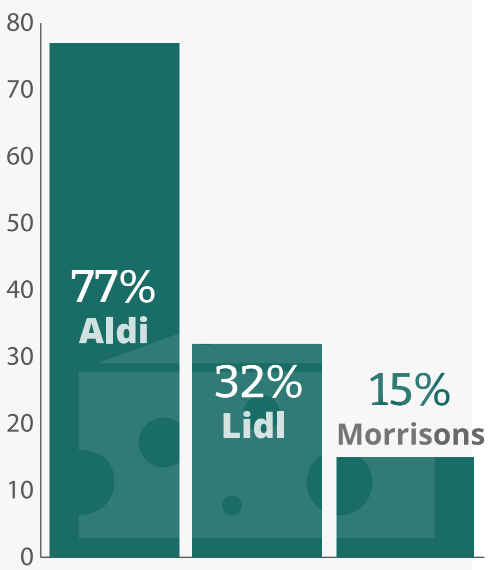
Overall market share was:

- 73% British own-label butter
- 2% imported
- 25% as non-dairy spreads

Despite the lack of Scottish butter, Aldi leads in domestic sourcing, with 86% of its own-label butter Scottish or British – up from 69% in January 2025. M&S follows closely with 81%, having increased by 5% year on year. While the Co-op and Tesco have both increased their share of British butter, they continue to be the largest importers of own-label butter.

Cheese

Retailer performance: % of cheese that is Scottish



58% of products were own label.

As part of our ongoing commitment to continuously improve ShelfWatch, we have opted to focus the cheese audit specifically to look at cheddar cheese as it is of most relevance to Scottish producers. As a result, direct year-on-year comparisons are not possible, but this targeted approach allows for deeper insight into this key category.

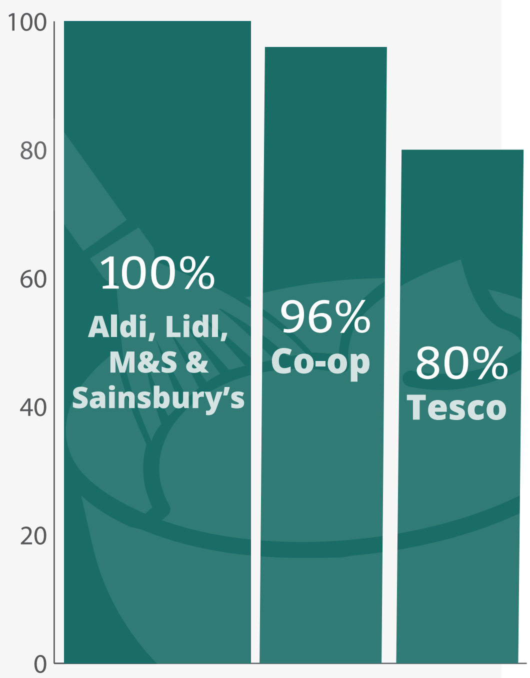
In January 2026, 58% of cheddar on shelves were own-label products. Of these, 12% were Scottish and 88% were British. Aldi, Lidl and Morrisons all stocked Scottish cheddar, while the remaining supermarkets offering 100% British cheddar in their own-label ranges. Encouragingly, despite global availability of cheddar, no imported own-label cheddar was recorded.

However the sector continues to face pressure. UK wholesale prices for mild cheddar fell sharply from £4080 per tonne in December 2024 to £2830 per tonne in December 2025. Future ShelfWatch audits will identify whether the significant fall in wholesale prices is reflected in retail prices[1].

1. See: https://ahdb.org.uk/dairy/uk-wholesale-prices

Cream

Retailer performance: % of cream that is Scottish



57% of products were own label.

We have introduced a new category of cream for this next iteration of ShelfWatch. This audit covers fresh single and double cream, which is labelled as own label.

Cream is a high-value product and plays a crucial role in determining the overall farmgate milk price, particularly through its impact on the value of raw milk components. As a major, widely traded commodity, fluctuations in bulk cream prices directly impact processor returns.

Since this is the first time we are auditing cream, no year on year comparisons can be made. However, including cream in ShelfWatch going forward will enable us to track how changes in the wholesale market influence retail availability, pricing and sourcing.

Initial findings show strong support for Scottish cream, with 63% of cream identified as Scottish and 37% was labelled as British. Aldi, Lidl, M&S and Sainsbury's all stocked 100% Scottish cream in their own-label ranges. Retail prices for fresh cream varied across store, ranging from £4.92 per litre to £5.84 per litre.

This new category provides a valuable baseline to monitor how retailer behaviour aligns with market movements and how that, in turn, affects the dairy supply chain.

Shelf Watch

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