NFUScotland

Shelf Watch

Mid-year report: 2026

Presidential Foreword

President Andrew Connon

ShelfWatch continues to provide an important snapshot of the level of support for Scottish produce on Scotland's supermarket shelves. The findings in this Mid-Year Report present a mixed picture. There are many positive examples of retailers backing Scottish farmers and crofters, with notable improvements in categories such as chicken, soft fruit, vegetables and fresh pork. At the same time, there are clear warning signs in some sectors, particularly where Scottish products are at risk from imported alternatives or the potential of a food price cap distorting the market. This report continues to serve as an important evidence base for our wider lobbying efforts.

Across all products surveyed, 26% of own-label products were identified as Scottish in August 2026, it represents a significant improvement from 19% at the same point last year, although this must be caveated due to some changes in methodology. Encouragingly, almost 89% of products are domestically sourced when considering combined Scottish and British labels, demonstrating that domestic sourcing remains the norm across most retailers.

The report highlights the crucial role retailers play in supporting Scotland's farming sector. Strong commitments from retailers such as Aldi, Lidl, Co-op and M&S demonstrate what can be achieved when Scottish sourcing is prioritised. However, there remain significant differences between retailers and between categories. We must also draw attention to the food service and out of home sector, where the same level of transparency does not exist.

Scottish farmers continue to face rising costs, volatile markets and increasing competition from imports. Recent months have seen salmonella outbreaks, reinforcing why we must take import equivalence seriously. Against that backdrop, maintaining and growing Scottish sourcing is more important than ever. When retailers choose Scottish produce, they support local jobs, strengthen food security, and help sustain the high standards of production that consumers increasingly expect.

This report demonstrates that progress is possible, but also that there is more to do. NFU Scotland will continue to work with retailers, processors and policymakers to ensure Scottish consumers can continue to find and choose Scottish food on Scottish shelves.

Summary

The August 2026 ShelfWatch audit found that Scottish sourcing across all audited own-label products remained stable at 26%, up 7% compared with August 2025. Combined Scottish and British sourcing increased to 89%, highlighting the continued dominance of domestic supply across most supermarket own-label ranges.

While all retailres have improved their scottish sourcing compared to last year, Aldi remains the strongest-performing retailer for Scottish sourcing, with 68% of own-label products identified as Scottish, followed by Lidl at 51%. Both retailers significantly outperform others and continue to demonstrate strong support across a number of categories, particularly beef, lamb, chicken, eggs and fresh vegetables. Co-op and M&S each recorded Scottish sourcing levels of around 30%, while Tesco continued its recent improvement, increasing Scottish sourcing to 23%.

At a category level, eggs, milk and cream remain among the strongest examples of Scottish produce on Scottish shelves. Scottish eggs represented almost three-quarters of audited products, while Scottish milk accounted for 89% of conventional milk lines.

Fresh produce produced some of the most positive results in the report. Scottish vegetables increased by 6% year-on-year. Scotland's competitive advantage and access to water leave the sector well placed to continue growing. Soft fruit also performed strongly, with Scottish sourcing increasing by 11% compared with August 2025, reflecting the strength of Scotland's globally recognised berry sector.

The red meat sectors present a more varied picture. Scotch beef remains the dominant source of beef on Scottish shelves. However, there have been modest reductions in Scottish sourcing over the past year. While much of this has been replaced by British product rather than imports, continued retailer commitment will be essential as market conditions evolve.

Despite these positives, concerns remain, particularly as imported pork is increasing in some retailers at a time when domestic producers are facing severe market pressures, while imported lamb continues to represent one fifth of all lamb products.

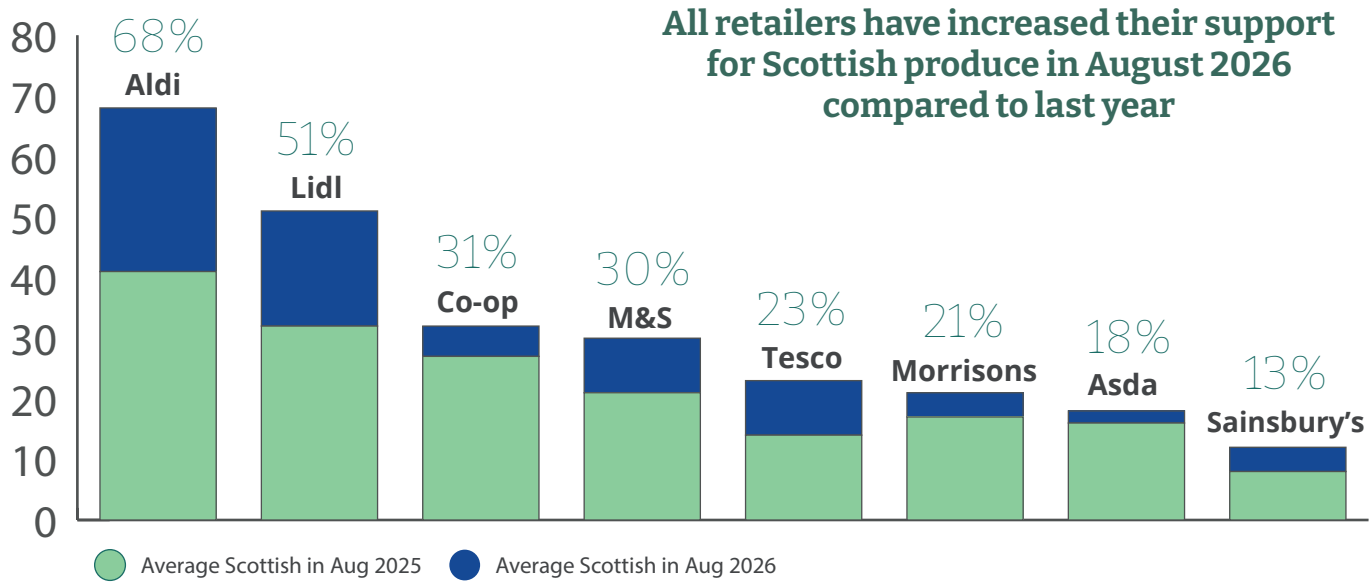
Overall, the findings show that Scottish sourcing remains resilient and, in many cases, continues to improve. However, retailer performance remains highly variable, demonstrating that there is still significant scope to increase support for Scottish produce and strengthen the connection between Scottish consumers and Scotland's food producers.

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.

Retailer Performance

Support for Scottish own label products August 2026



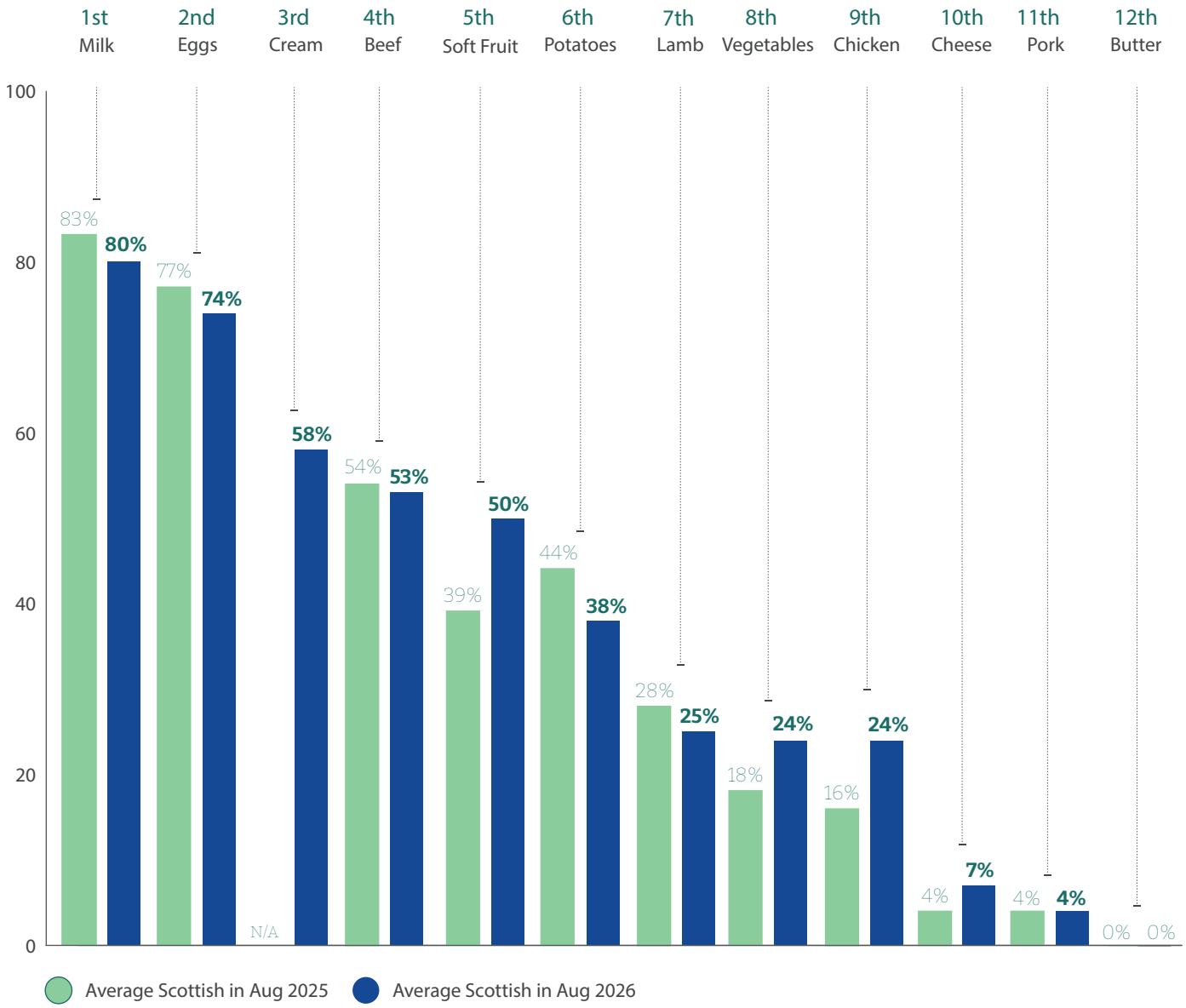
Average Combined Performance for August 2026

	Store	Aug-26 Scottish	Aug-26 British	Aug-26 Combined Total
1	Co-op	31%	67%	**99%**
2	Aldi	68%	30%	**98%**
3	M&S	30%	66%	**96%**
4	Sainsbury's	13%	82%	**95%**
5	Lidl	51%	43%	**94%**
6	Tesco	23%	64%	**87%**
	Morrisons	21%	64%	**87%**
7	Asda	18%	61%	**79%**
Total		**26%**	**63%**	**89%**

Proportion of imported products as per August 2026 audit

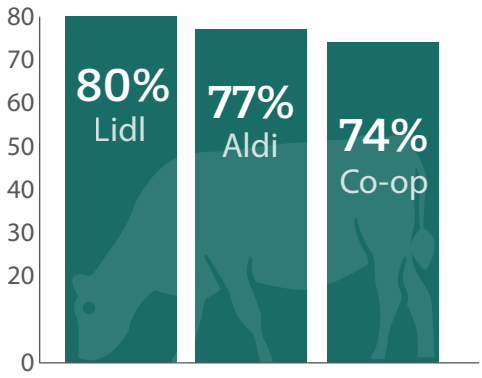
	Store	Average imports
1	Co-op	1%
2	Aldi	2%
3	M&S	4%
4	Sainsbury's	6%
	Lidl	6%
5	Tesco	13%
6	Morrisons	15%
7	Asda	21%
Average		**11%**

Commodity ranking by average Scottish with comparisons where applicable



Beef

Retailer Performance: % of Scotch Beef



93% of products were own label.

Scotch beef continues to hold the largest share of own label products at 53%, with a further 45% sourced from the UK and just 2% imported. Compared with last year, Scotch beef has declined by 1%, while British sourcing has increased by 2% and imports have fallen by one percentage point.

Performance remains mixed across retailers. Lidl continues to lead at 80%, followed by Aldi at 77%. However, both retailers have recorded notable declines in Scottish sourcing over the past year, down 8% and 6% respectively. Encouragingly, these reductions have largely been offset by increased British sourcing rather than imports. Co-op (74%) and M&S (70%) continue to demonstrate strong support for Scotch beef, increasing their Scottish share by 2% and 3% respectively since this time last year. At the other end of the scale, Sainsbury's recorded no Scotch beef listings, while Asda's Scotch share stood at 36%.

The beef market remains characterised by tight cattle supplies and strong farm-gate prices. Across the summer, AHDB reported strong sales of beef steaks and other grilling products, helped by the warmer weather and the growing popularity of 'big nights in', with consumers eating out less and instead buying premium meals to enjoy at home.

While retail beef inflation has begun to ease, consumers continue to substitute beef with cheaper proteins. As supply and pricing stabilise through the remainder of 2026, it will be interesting to see if retailers maintain Scotch beef volumes as the market stabilises.

Lamb

Origin breakdown of own label lamb

25% Scotch

55% UK

18% New Zealand

2% Australian

98% of products were own label.

25% of lamb listings were Scotch, 55% British and 20% imported from Australia and New Zealand. Year-on-year, Scotch lamb fell by 3%, with British lamb increasing by 6% and imports decreasing by 3%.

Lidl continues to lead on Scottish sourcing, with 94% Scotch lamb, up 2% since August 2025. Aldi also maintains a strong Scottish offering at 86%, although this has declined by 8% over the year. M&S had 75% Scotch lamb, while Morrisons increased its Scottish share by 3% to 42%.

Retailer performance elsewhere remains mixed. Asda, Co-op, Sainsbury's and Tesco stocked no Scotch lamb during this reporting period. Most notably, Co-op reduced its Scottish lamb share by 17% year-on-year, replacing it with British product. While Asda significantly reduced imports, Sainsbury's increased imported lamb by 14%.

While farm-gate conditions remain positive, the proportion of Scotch lamb on retail shelves continues to present a varied story. The decline in Scottish sourcing among some retailers is disappointing and highlights the need to maintain support for domestic production.

Looking ahead, the Australia and New Zealand trade agreements remain a concern, providing retailers with greater access to imported alternatives should domestic prices become harder to justify to consumers.

Pork

Origin breakdown of pork categories:

4% Scotch

73% British

10% EU

13% Mixed origin

89% of products were own label.

The pork category continues to show significant variation across product types. Fresh pork remains the strongest performer for Scottish sourcing, with 11% being Scottish, alongside 79% British and 10% imported. This represents a welcome 7% increase in Scottish sourcing since August 2025, largely driven by Tesco introducing Scottish pork lines.

Scottish sausages also remain relatively strong at 7%, representing a 2% increase over the year, with British product representing the remaining 93%.

Elsewhere, the picture is less positive. Scottish bacon and gammon remain extremely limited at just 1%. Cooked ham also contains very little Scottish product, at 2%, with almost a third of lines carrying mixed-origin sourcing.

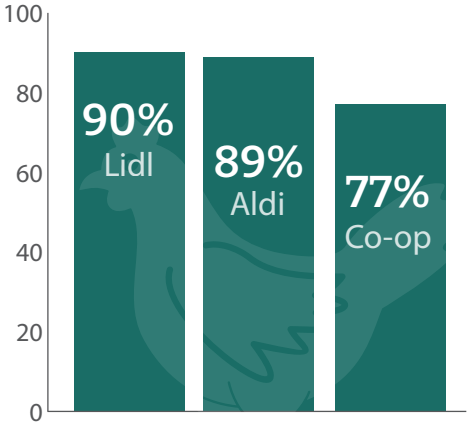
Aldi continues to stock the highest proportion of Scottish pork products overall at 40%, while Tesco has increased Scottish sourcing from 0% this time last year to 7%, demonstrating encouraging progress. Co-op, M&S and Sainsbury's all stock 100% UK pork, although Sainsbury's has removed the small amount of Scottish pork recorded earlier in the year.

In contrast, Asda remains a significant concern, with almost half of its pork imported, which is an increase of around 40% compared with last year.

The increase in imported pork across some retailers comes at a particularly difficult time for Scottish and UK producers. It is extremely disappointing to see significant increases in imported product, presumably taking advantage of the fall in pork prices on the continent. Scottish and UK pork producers are under significant pressure, having seen a crash in prices since late Autumn last year, receiving well below the cost of production since the start of the year.

Chicken

Retailer performance: % of chicken that is Scottish



99% of products were own label.

24% of chicken SKUs were Scottish, with the remaining 76% labelled UK. This is comparable with the January results but represents a significant increase of 8% in Scottish sourcing compared with August 2025.

Lidl and Aldi continue to lead on Scottish chicken. Both retailers have increased their Scottish offering since the start of the year, with Lidl's performance particularly notable given it stocked no Scottish chicken at this point last year. Co-op also maintains a strong Scottish presence, with 77% of its chicken Scottish, while M&S has continued to make incremental improvements and now stocks 48% Scottish chicken.

At the other end of the scale, Morrisons, Sainsbury's and Tesco do not currently stock any Scottish chicken. However, these retailers maintain 100% UK sourcing, which is welcome.

Overall, the chicken category presents a positive picture, with a growing share of Scottish chicken on Scottish shelves and no evidence of imported product. This trend bodes well for the increase in broiler production in Scotland and any potential expansion of Scotland's poultry processing capacity.

Vegetables

Origin breakdown of own label Vegetables

24% Scottish

65% UK

11% Other

100% of products were own label.

24% of vegetables were Scottish, 65% British and 11% imported. Compared with August 2025 Scottish sourcing has also increased by 6%, while imports declined by 4%.

The strongest growth was seen in well-established Scottish categories such as, Scottish cabbage increased by 17%, while Scottish broccoli also recorded a notable increase, rising to 26%. Swedes, parsnips and cabbage remained 100% British sourced.

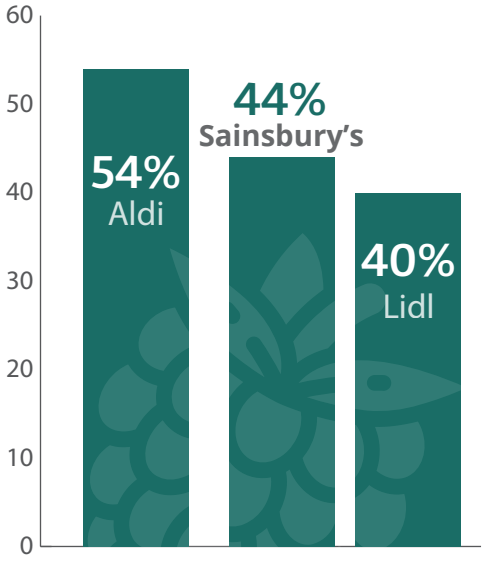
Aldi continues to lead, with 66% of vegetable lines sourced from Scotland, an increase of 12% compared with last year. Looking at combined domestic sourcing, Aldi (99%), Asda (93%) and Co-op (92%) provided the highest levels of Scottish and British produce.

M&S recorded the highest level of imported vegetables, with almost a quarter of products sourced from overseas. While Lidl significantly reduced imports, decreasing by 23% compared with August 2025, however one fifth of its vegetable lines remain imported.

The category continues to demonstrate the importance of seasonal domestic supply. Maintaining productive capacity and resilience will be critical if Scottish growers are to capitalise on future demand, particularly as other parts of the UK face increasing climate volatility.

Soft Fruit

Average support for Scottish Soft Fruit over the Summer



96% of products were own label.

In August, 50% of fruit was labelled as Scottish, 25% British and 25% imported. Compared with August 2025, Scottish sourcing increased by 11%, while British sourcing fell by 10% and imports decreased slightly by 1%.

Across the summer series (audits in May, June and August), an average of 56% of berries were domestically sourced, comprising 34% Scottish and 22% British. Scottish berries consistently accounted for a larger share of listings than British berries, demonstrating the strength of Scotland's soft fruit sector during the peak domestic season.

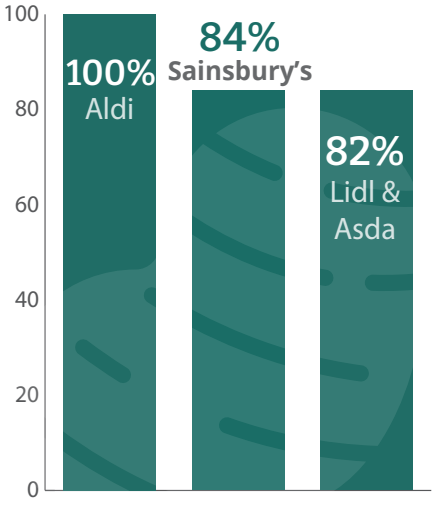
Aldi again led retailer performance, with 82% of soft fruit sourced from Scotland in August, followed by Co-op at 75% and Sainsbury's at 59%. These retailers continue to provide strong support for Scottish growers during the domestic production season.

Despite performing well for Scottish sourcing, Sainsbury's also recorded the highest proportion of imported fruit at 39%, reflecting the complex and highly seasonal nature of the category. This was further complicated by the domestic season starting earlier than expected. Asda (33%) and Morrisons (29%) also carried significant levels of imported fruit.

Overall, the soft fruit category provides a positive story for Scottish agriculture. The increase in Scottish sourcing compared with last year demonstrates the continued strength and competitiveness of domestic production. However, imports remain an important feature of retailer ranges in maintaining availability throughout the year, underlining the importance of extending seasonal availability and supporting future investment in the sector.

Potatoes

Retailer performance: % of potatoes that are Scottish



86% of products were own label.

Domestic sourcing continues to dominate the potato category, with 38% of potatoes identified as Scottish and a further 60% sourced from the wider UK. Imports remain limited, with just 1% sourced from Israel and 1% from other countries.

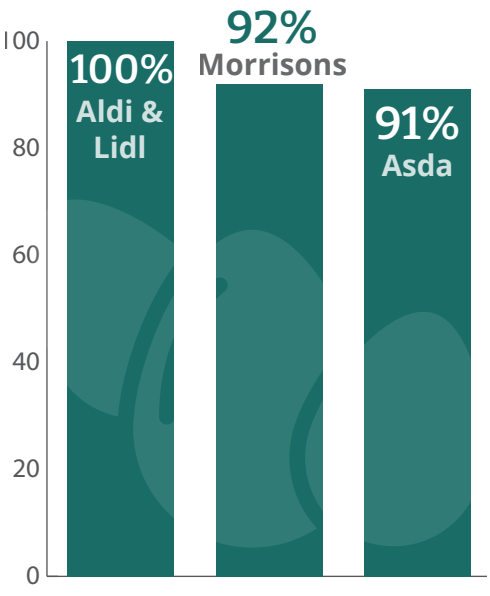
Compared with January 2026, Scottish sourcing has fallen by 13%, while UK sourcing has increased by 11%. However, these changes are likely to reflect differences in labelling rather than a fundamental shift away from Scottish supply. Year-on-year, a similar pattern is apparent, with Scottish labelled potatoes being substituted with UK labelled potatoes.

M&S records the highest level of imported potatoes, with almost 10% sourced from Israel and other countries, although this marks a significant improvement on August 2025, when imports accounted for over 28% of supplies.

Looking ahead, hot and dry weather across much of England and Europe may tighten supplies and increase potato prices, potentially creating opportunities for Scottish growers. While this may not immediately translate into higher levels of Scottish-labelled produce, it could strengthen the market position of Scottish potatoes over the coming year.

Eggs

Retailer performance: % of eggs that are Scottish



53% of products were own label.

74% of own label eggs were Scottish, with the remaining 26% labelled as UK. While Scottish eggs continue to dominate the category, however is a 3% decline compared with August 2025. It's important to note this decline has been absorbed by UK labels rather than any imported produce displacement.

Aldi and Lidl continue to lead the way, with both retailers sourcing 100% of their eggs from Scottish producers. Morrisons (92%) and Asda (91%) also maintain strong support for Scottish egg production.

Elsewhere, the picture is more mixed. Co-op sourced 89% of its eggs from Scotland, remaining one of the stronger performers overall, although this is below the 100% Scottish sourcing previously recorded. M&S stocked 74% Scottish eggs, an improvement on the same period last year but notably lower than the 86% recorded in January.

Despite the reduction in Scottish sourcing since both January 2026 and August 2025, the egg category remains one of the strongest examples of Scottish produce on Scottish shelves. Most retailers continue to source a high proportion of Scottish eggs, demonstrating the strength of the domestic sector and the clear opportunity to further build on consumer demand for locally produced food.

Fresh Milk

Retailer performance: % of fresh milk that is Scottish

60% products were own label.

Milk remains one of the strongest categories for Scottish sourcing, with all own-label milk identified as either Scottish or British in origin. For conventional milk, 87% of lines are Scottish and 13% British, while organic milk remains more evenly split, with 49% Scottish and 51% British.

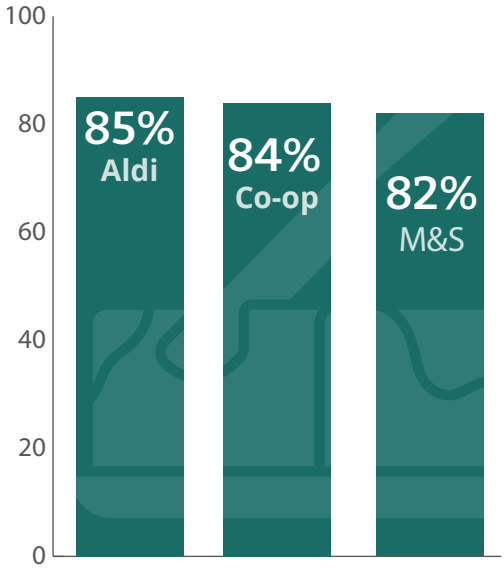
The category has remained relatively unchanged since January 2026, demonstrating continued retailer commitment to Scottish and British sourcing. Compared with August 2025, however, there has been a slight decline Scottish sourcing, down 3%.

Aldi continues to lead the way with M&S and Sainsbury's also performing strongly. At the other end of the scale, Co-op records the lowest proportion of Scottish milk at 62%, although all own-label milk remains sourced from either Scotland or the wider UK.

Overall, the milk category continues to provide a positive sourcing story, with no imported own-label milk identified and a significant proportion of Scottish products. Conventional milk prices have remained largely unchanged over the past year, decreased only marginally from 110p per litre in August 2025 to 109p per litre in August 2026, organic milk prices have risen from 134p to 140p per litre, reflecting continued pressure within that segment of the market.

Butter

Retailer performance: % of butter that is British



25% of products were own label.

Butter remains one of the weakest categories for Scottish provenance. No Scottish own-label butter was identified across any of the retailers surveyed. Overall, 76% of own-label butter was sourced from the UK, while 24% was imported.

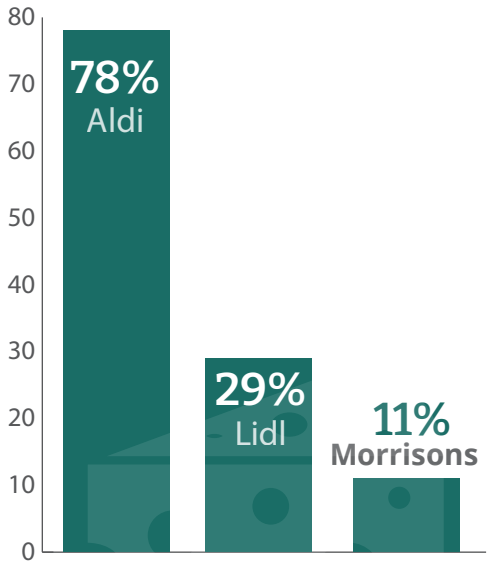
The category has seen only modest change over the year. Since January 2026 At that time, 72% of own-label butter was British and 28% imported, meaning British sourcing has increased by 4%, with a corresponding reduction in imports. A similar pattern is evident year-on-year, with British sourcing increasing from 73% in August 2025 to 76% in August 2026.

Aldi recorded the highest proportion of British own-label butter, with 85% sourced from Britain, although this is below the 92% recorded at the same point last year. Co-op has shown the most notable improvement, increasing British sourcing from 50% in August 2025 to 84% in August 2026. At the other end of the scale, Tesco recorded the lowest proportion of British own-label butter, with 68% sourced domestically and almost one-third imported.

While the reduction in imported butter is welcomed, it remains disappointing that no Scottish own-label butter was identified in any retailer. Given Scotland's strong dairy sector and the prominence of Scottish milk and cream on supermarket shelves, the continued absence of Scottish own-label butter represents a clear missed opportunity for retailers and an area where support for Scottish provenance could be strengthened.

Cheese

Retailer performance: % of cheese that is Scottish



57% of products were own label.

Own-label cheddar remains a fully domestic category, with 100% of products identified as either Scottish or British. In August 2026, 7% of own-label cheddar was identified as Scottish and 93% as British.

The proportion of Scottish cheddar has declined since the start of the year. In January 2026, 12% of own-label cheddar was identified as Scottish, meaning Scottish representation has fallen by more than a third over the past eight months. Given changes to the cheese methodology this year, comparisons with August 2025 are not directly comparable.

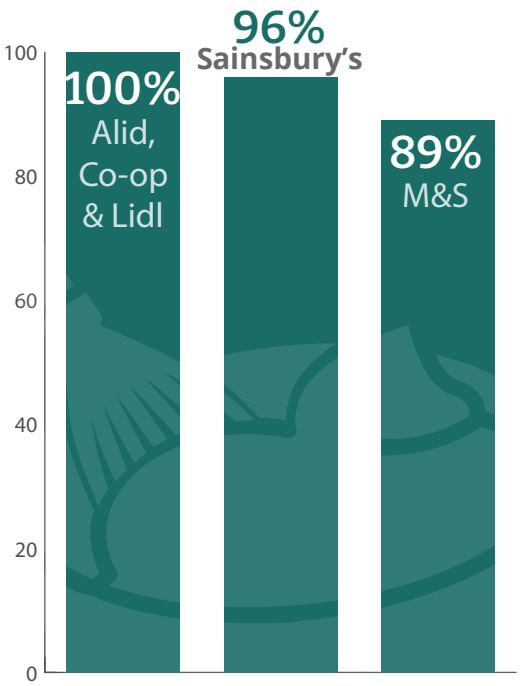
Aldi continues to lead, consistently stocking significant volumes of Scottish own-label cheddar. Scottish cheddar accounts for 78% of Aldi's own-label range, broadly unchanged from January. Lidl (29%), Morrisons (11%) and Tesco (9%) also stock Scottish own-label cheddar, although at much lower levels.

In contrast, no Scottish own-label cheddar was identified in Asda, Co-op, M&S or Sainsbury's during either the January or August 2026 surveys, with these retailers relying entirely on cheddar sourced from elsewhere in the UK.

It is positive that all own-label cheddar remains Scottish or British in origin. However, the continued decline in Scottish cheddar and the limited number of retailers stocking Scottish product highlights a significant opportunity for retailers to strengthen Scottish sourcing and better showcase Scottish dairy products on Scottish shelves.

Cream

Retailer performance: % of cream that is Scottish



44% of products were own label.

Overall, cream remains a positive category for domestic sourcing, with all own-label products across the retailers surveyed identified as Scottish or British in origin. In August 2026, 58% of own-label cream was labelled as Scottish.

While no imported own-label cream was identified, the proportion of Scottish cream has fallen slightly since January 2026. At the start of the year, 63% of own-label cream was identified as Scottish, meaning Scottish representation has declined by 5% since the start of the year, offset by increased British sourcing.

Aldi, Co-op and Lidl continue to lead the category, with 100% of their own-label cream identified as Scottish. In contrast, no Scottish own-label cream was identified in Asda or Morrisons, with products instead labelled as UK.

The modest decline in Scottish sourcing since January is disappointing, but Scottish cream continues to represent the majority of own label products available on Scottish shelves. During the same period, cream prices have increased, with double cream rising from £5.93 to £6.30 per litre and single cream increasing from £4.88 to £4.96 per litre.

NFU Scotland

Shelf Watch

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