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# Shelfwatch 2024

## Phase 1



# Why?

- Provide a snapshot on the extent retailers are supporting Scottish producers through their sourcing policies
- To provide evidence to support our call to reform labelling rules
- Provides a platform for further dialogue on opportunities
- Not been done for many years (and no one else is...)

# Remit

- Identify the country of origin of each product through the label, shelf, or other identification mark on the product

# Scope

- **8 Retailers:** Tesco; Asda; Sainsburys; Morrisons; Aldi; Lidl; M&S; Co-op
- **71 Stores:** Edinburgh; Glasgow; Aberdeen; Dundee; Perth; Falkirk; Inverness; Dumfries
- **'Own-Label' Produce**
- **10 Categories:** Meat; Pork; Milk; Butter; Cheese; Eggs; Yoghurts; Fruit; Veg; Potatoes
- **Sub-categories:** Beef; Lamb; Chicken; Sausages; Bacon; Veg variety; Soft fruit
- **15,000** products audited

# Points of note

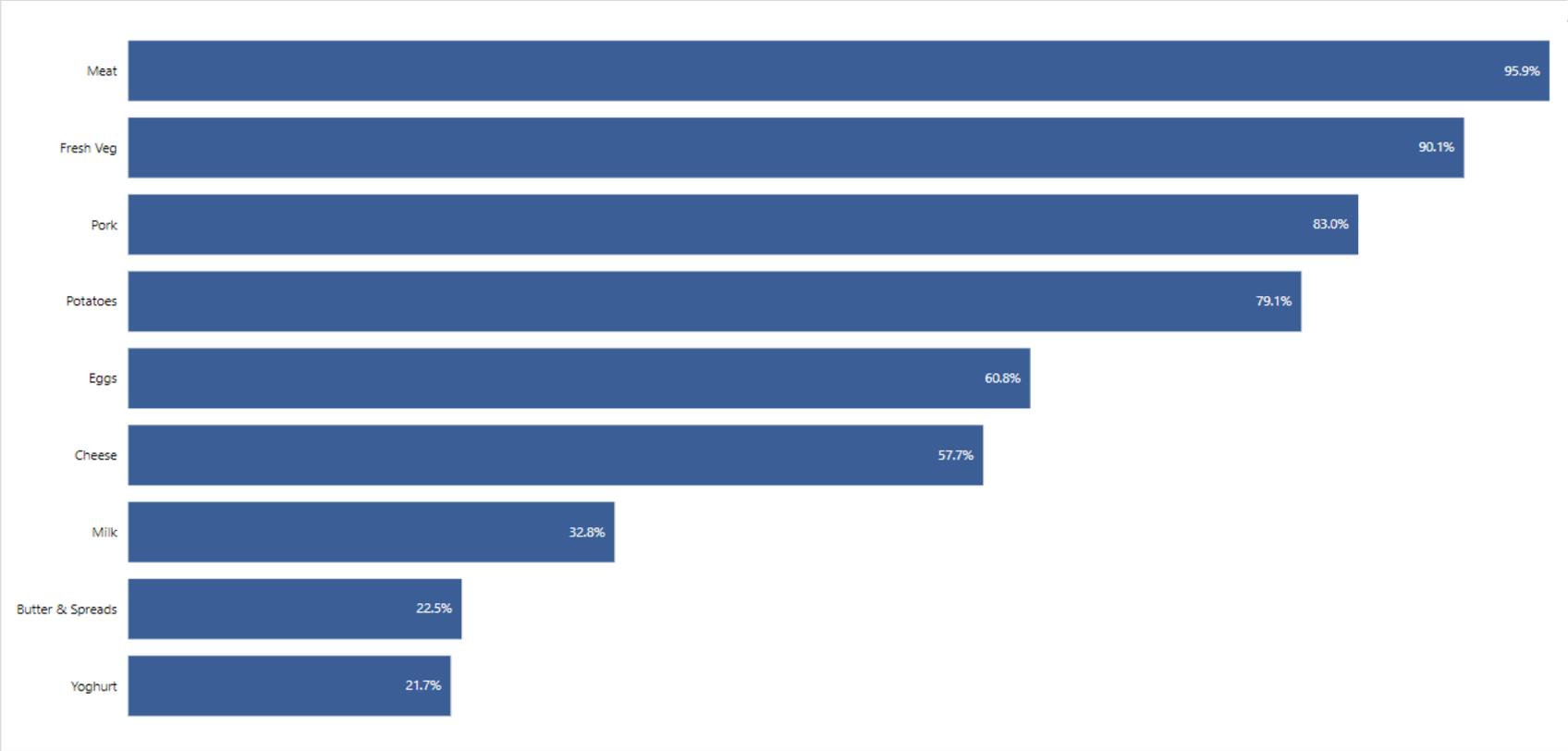
- Seasonality
- Own-label v Brand
- Fairness in the Supply Chain
- Food Service
- And....only initial findings.



NFU Scotland

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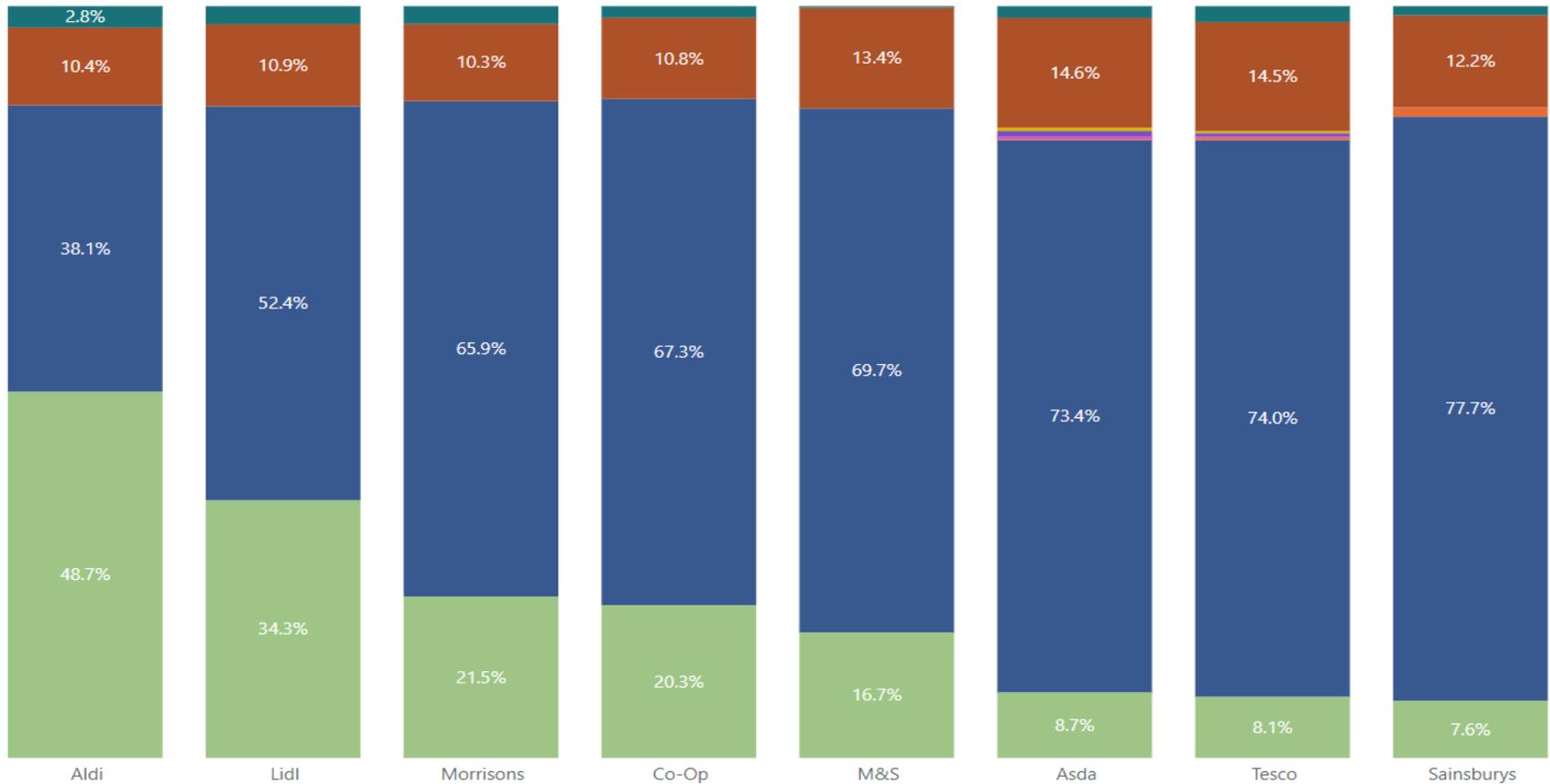
% OWN LABEL SKUS





# Overall Results

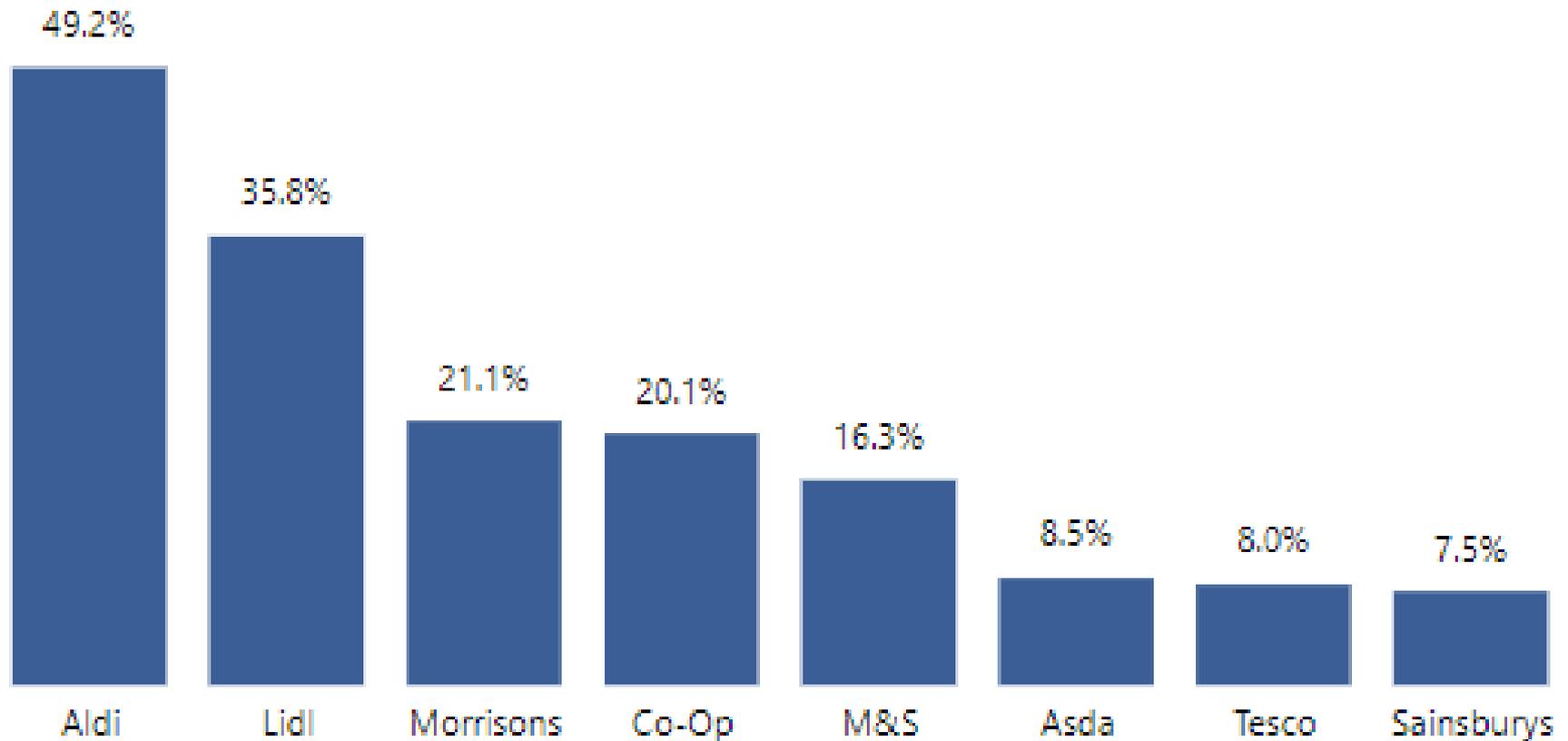
● % Scottish 
 ● % UK 
 ● % Irish 
 ● % EU 
 ● % Dutch 
 ● % Danish 
 ● % German 
 ● % Other 
 ● % N/A





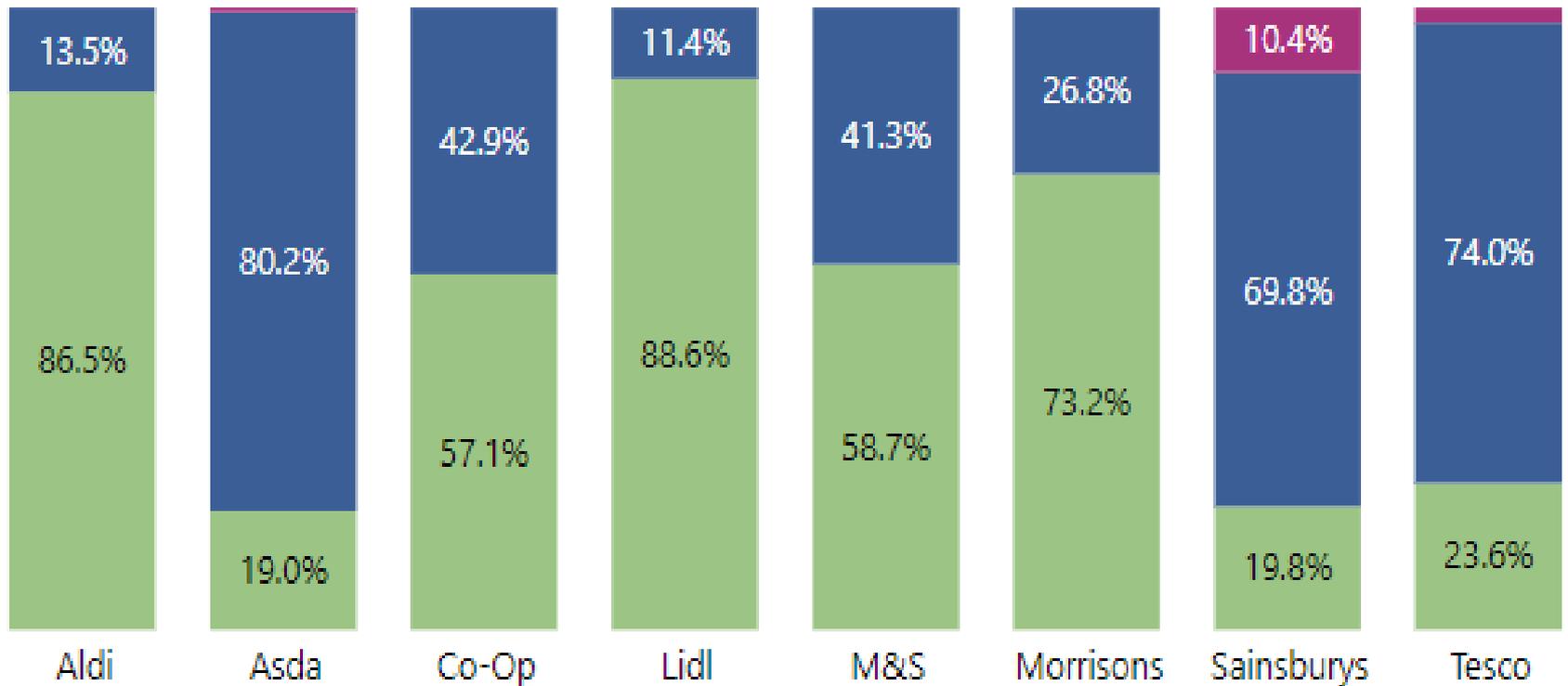
# Scottish Own Label

% Scottish Own Label



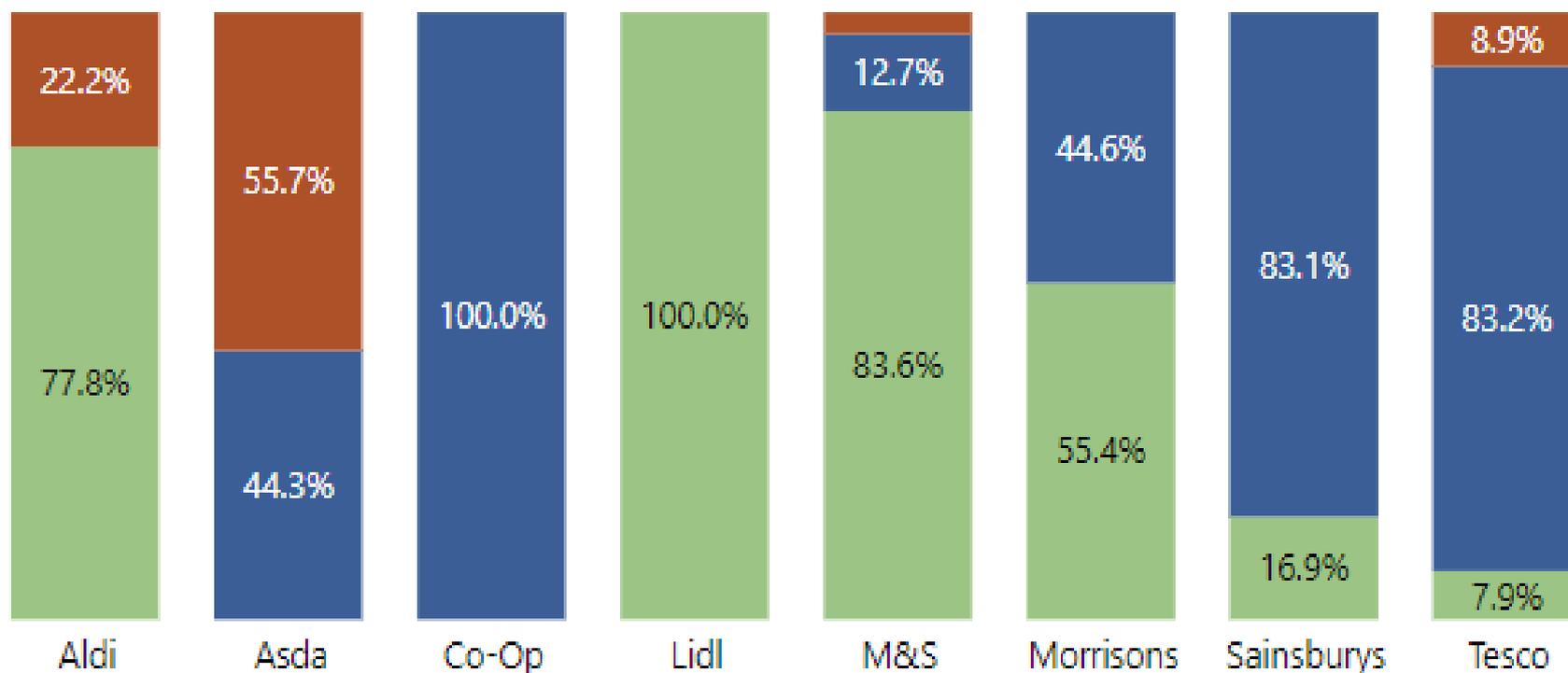
## Own Label Distribution Breakdown by Storegroup & Origin

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



## Own Label Distribution Breakdown by Storegroup & Origin

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

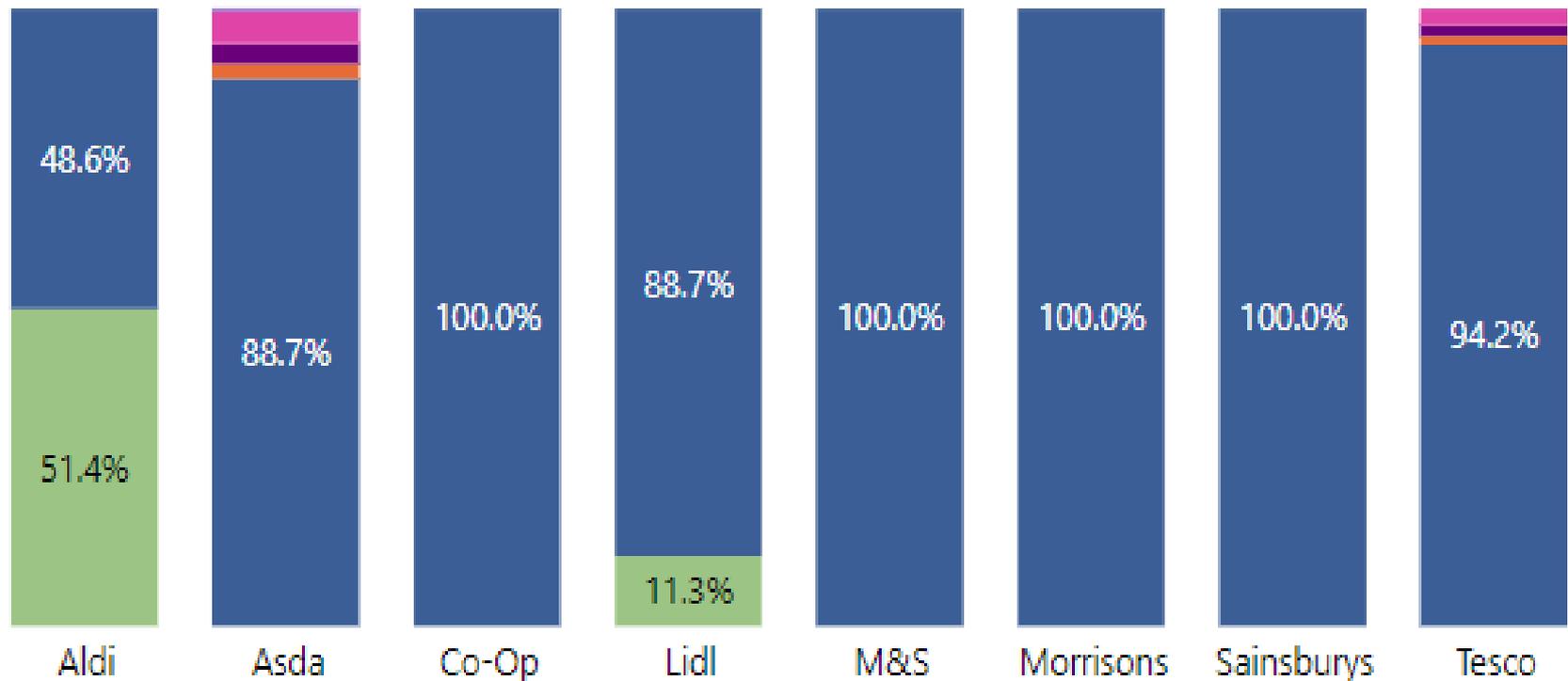




# Pork (Fresh/Bacon/Sausages)

## Own Label Distribution Breakdown by Storegroup & Origin

● % Scottish ● % UK ● % Dutch ● % German ● % Danish ● % EU ● % Other

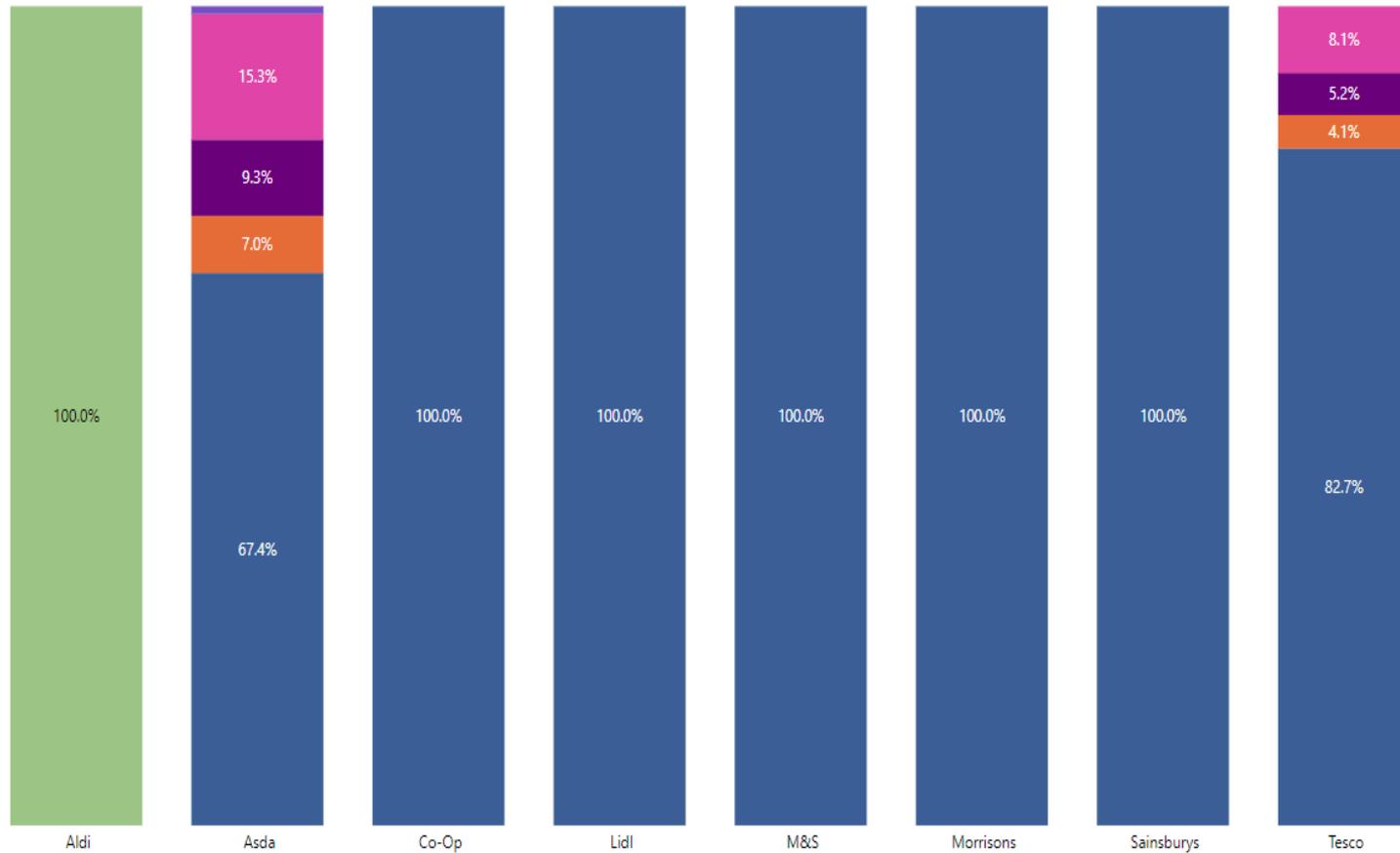


# Fresh Pork only

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## OWN LABEL DISTRIBUTION BREAKDOWN BY STOREGROUP & ORIGIN

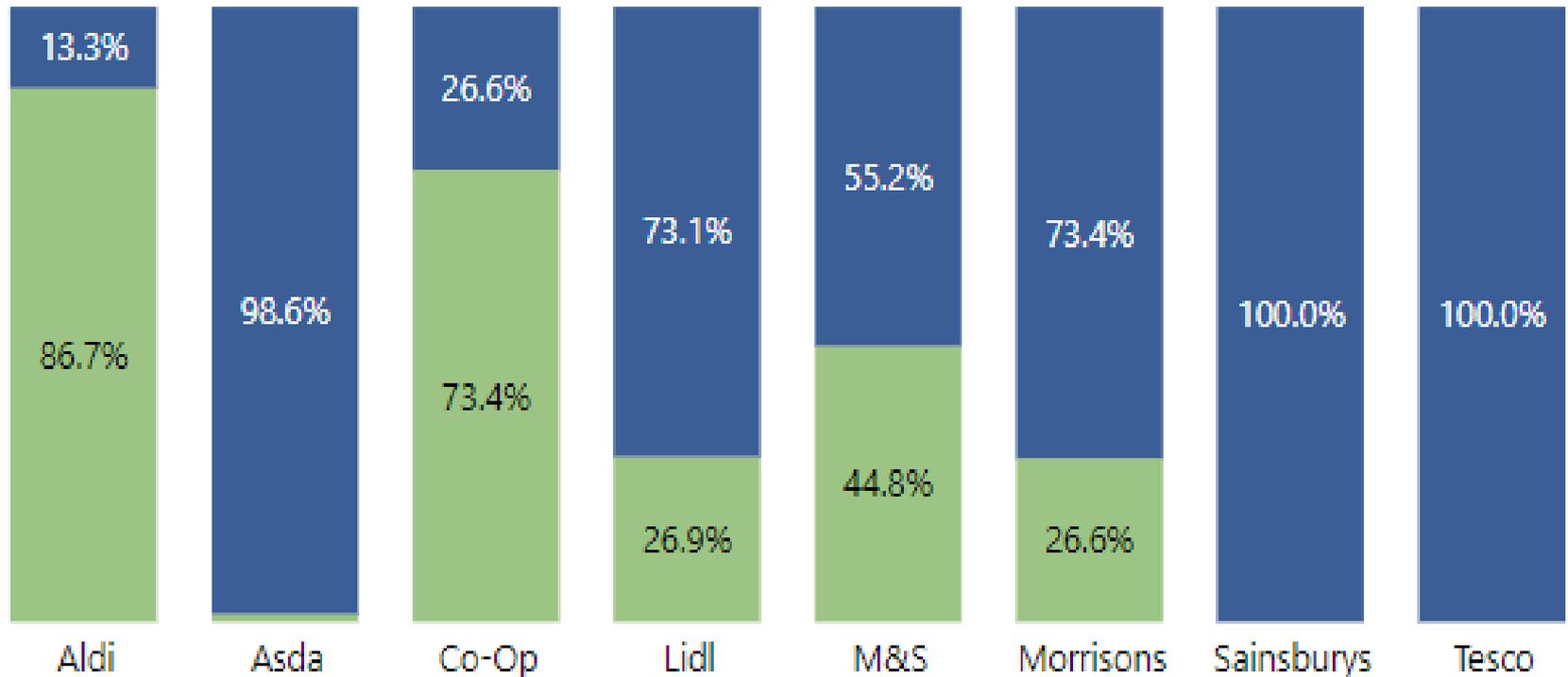
● % Scottish 
 ● % UK 
 ● % Dutch 
 ● % German 
 ● % Danish 
 ● % EU 
 ● % Other



# Chicken

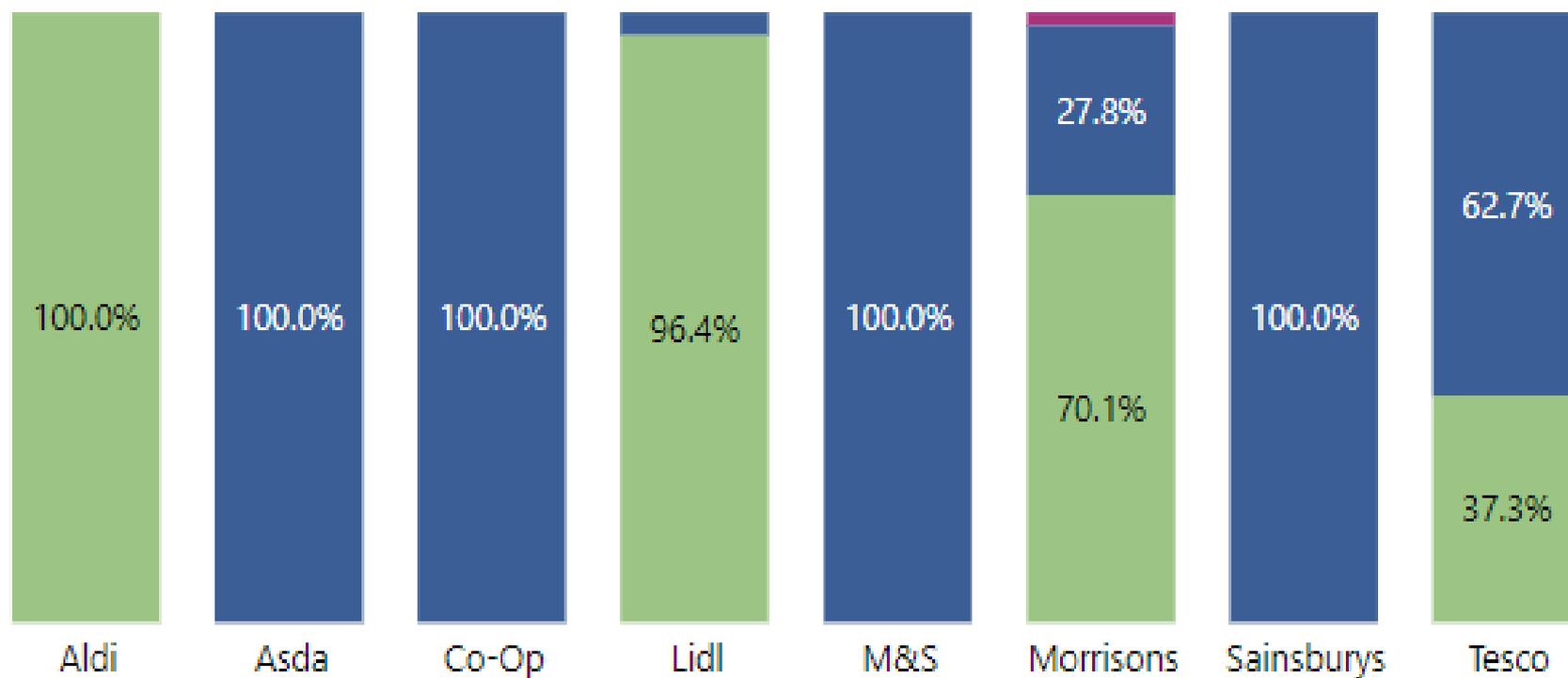
Own Label Distribution Breakdown by Storegroup & Origin

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



## Own Label Distribution Breakdown by Storegroup & Origin

● % Scottish 
 ● % UK 
 ● % Other 
 ● % N/A





# Vegetables

## SubCategory

Broccoli

Cabbage

Carrot

Cauliflower

Kale

Leek

Onion

Parsnip

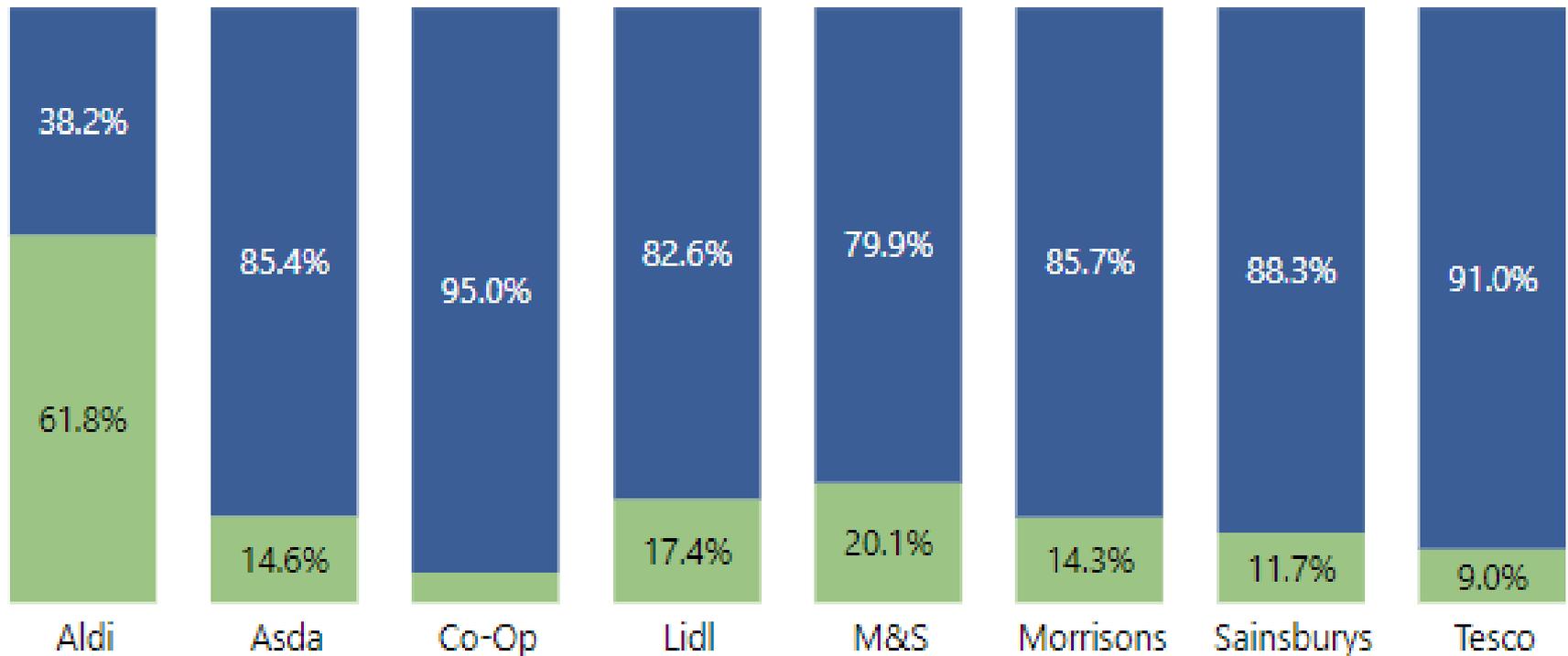
Sprouts

Swedes

# Vegetables

## Own Label Distribution Breakdown by Storegroup & Origin

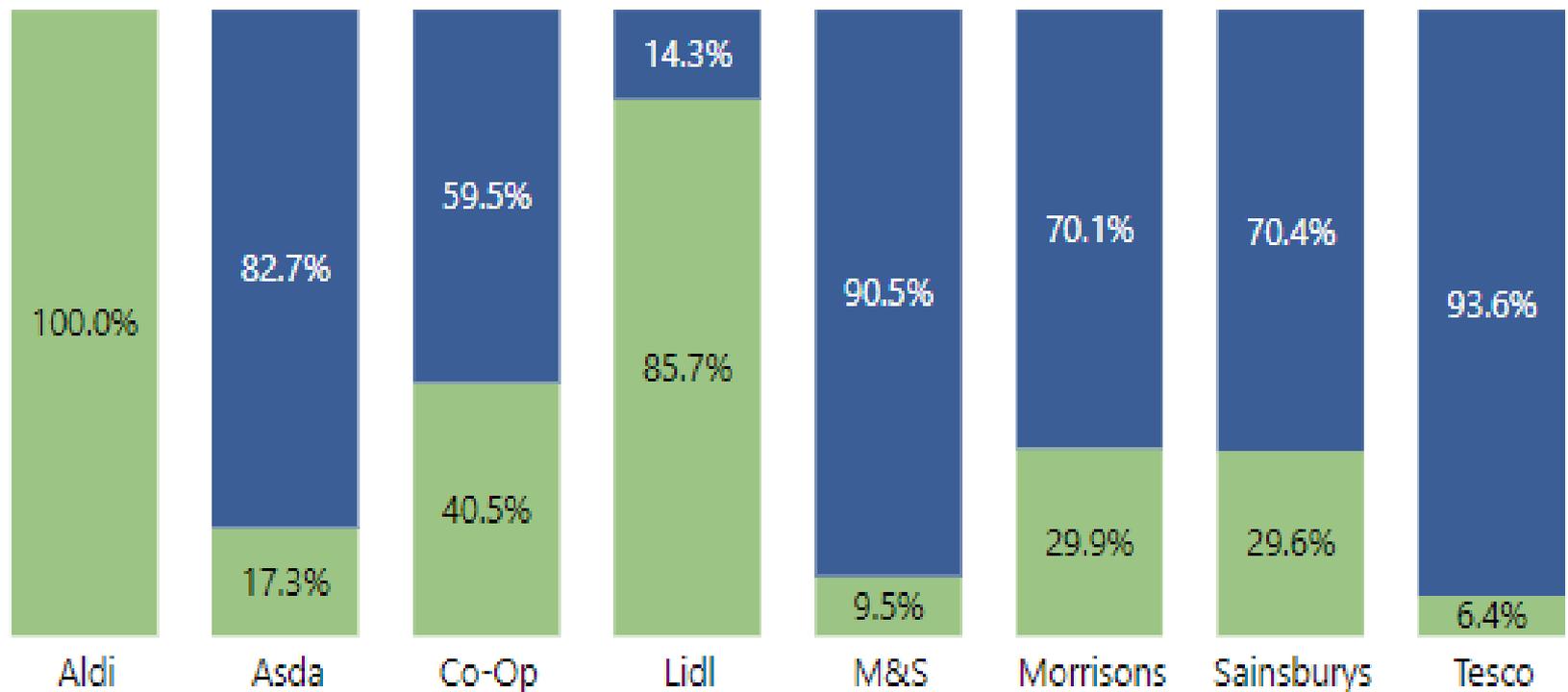
■ % Scottish ■ % UK



# Potatoes

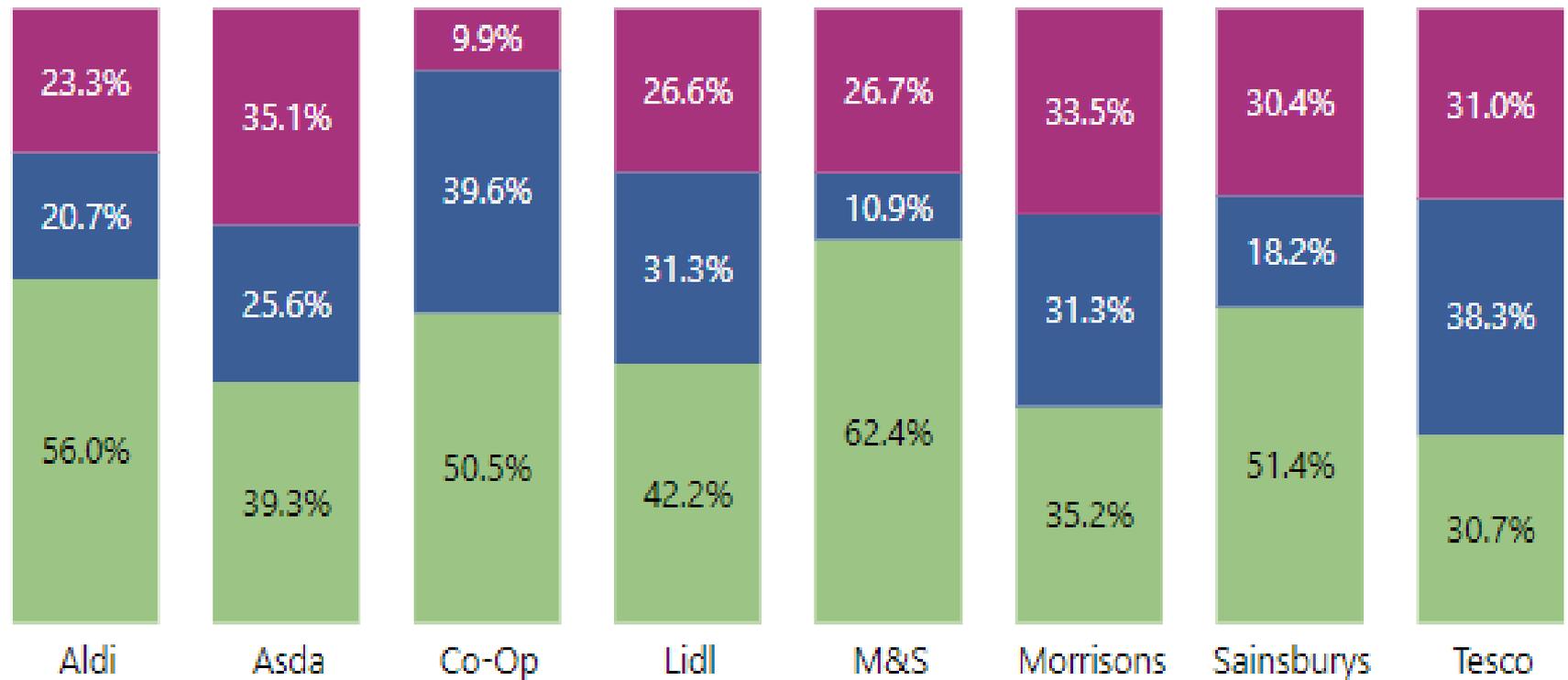
## Own Label Distribution Breakdown by Storegroup & Origin

● % Scottish ● % UK



## Own Label Distribution Breakdown by Storegroup & Origin

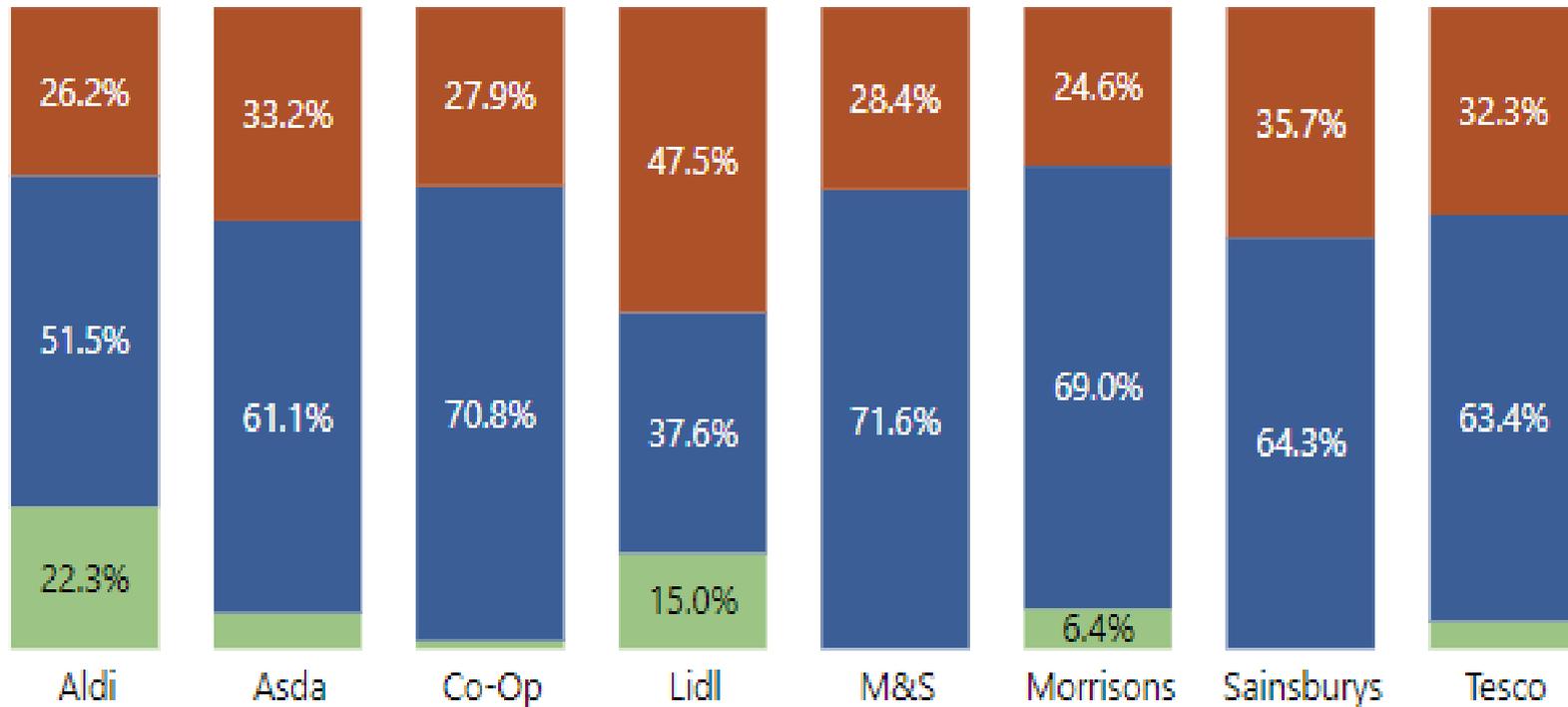
● % Scottish ● % UK ● % Non-Dairy



# Cheese

## Own Label Distribution Breakdown by Storegroup & Origin

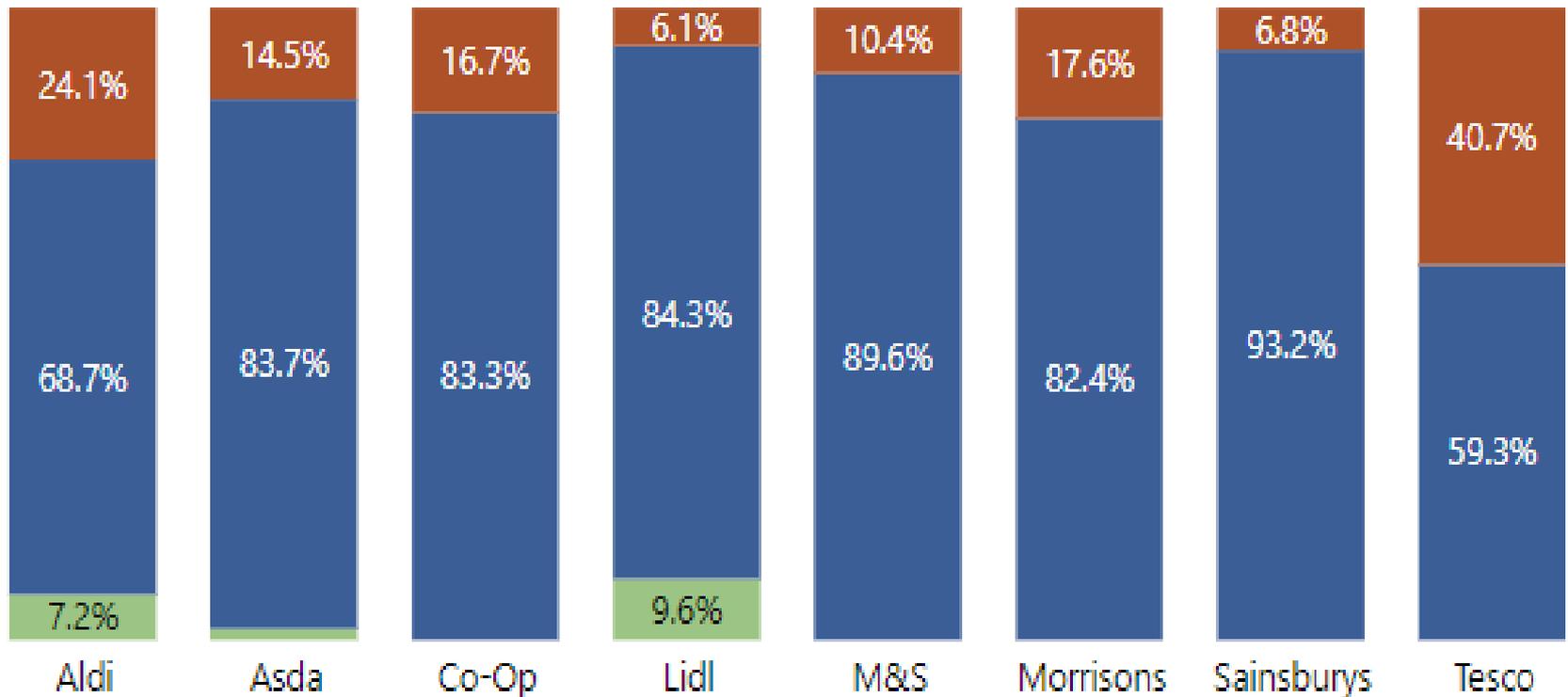
● % Scottish ● % UK ● % Other



# Yoghurt

## Own Label Distribution Breakdown by Storegroup & Origin

● % Scottish ● % UK ● % Other



# Reflections

- On the face of it, strong support for 'British'
- Mixed picture in terms of 'Scottish'
- However: need further deep-dive:
- Is 'British' actually Scottish suppliers?
- Is the origin information misleading – our industry insight suggests perhaps

# Next Steps

- Further analysis
- Retailer conversation
- Policy and regulation levers
- Phase 2 – May 2024