THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

# Meat & Poultry Category Report GB Retail

MARCH 2026

# TOTAL FRESH MEAT & POULTRY

CATEGORY: TOTAL FRESH MEAT & POULTRY

## SUB-CATEGORY: FRESH MEAT

### SECTOR: BEEF
SUB-SECTOR:
- BURGER
- CASSEROLE
- FILLET
- JOINT
- MEATBALLS
- MINCE
- RIBS
- STEAK
- ALL OTHER

### SECTOR: PORK
SUB-SECTOR:
- BURGER
- GAMMON JOINT
- LOIN
- MEATBALLS
- MINCE
- OFFAL
- OTHER BACON
- RASHERS
- RIBS
- ALL OTHER

### SECTOR: LAMB
SUB-SECTOR:
- BURGER
- CHOPS
- JOINT
- LEG
- MEATBALLS
- MINCE
- OFFAL
- SHANK
- SHOULDER
- ALL OTHER

### SECTOR: VENISON
SUB-SECTOR:
- BURGER
- MEATBALLS
- ALL OTHER

### SECTOR: SAUSAGE
SUB-SECTOR:
- B&W PUD & HAGGIS
- LAMB
- OTHER SAUSAGE
- SAUSAGE IN BACON
- VENISON

### SECTOR: ALL OTHER
SUB-SECTOR:
- BURGER
- MEATBALLS
- STUFFING
- ALL OTHER

## SUB-CATEGORY: FRESH POULTRY

### SECTOR: CHICKEN
SUB-SECTOR:
- BREAST/ FILLETS
- DRUMSTICK /LEGS
- DRUMSTICK /THIGHS
- MINCE
- OFFAL
- SAUSAGES
- THIGHS/ WINGS
- WHOLE/ CROWN
- ALL OTHER

### SECTOR: DUCK
SUB-SECTOR:
- BREAST/ FILLETS
- DRUMSTICK /LEGS
- WHOLE/ CROWN
- ALL OTHER

### SECTOR: TURKEY
SUB-SECTOR:
- BREAST/ FILLETS
- DRUMSTICK /LEGS
- MINCE
- THIGHS/ WINGS
- WHOLE/ CROWN
- ALL OTHER

### SECTOR: ALL OTHER
SUB-SECTOR:
- BREAST/ FILLETS
- DRUMSTICK /LEGS
- THIGHS/ WINGS
- WHOLE/ CROWN
- ALL OTHER

## SUB-CATEGORY: TREATED & PREPARED

### SECTOR:
Meat that has been flavoured and/or prepared for the convenience of the consumer.

## SUB-CATEGORY: COOKED MEATS

### SECTOR: COOKED MEATS
SUB-SECTOR:
- CONTINENTAL MEAT
- SLICED MEAT
- SNACKING MEAT
- WHOLE
- ALL OTHER

## SUB-CATEGORY: ROTISSERIE

### SECTOR: ROTISSERIE
SUB-SECTOR:
- MEAT
- POULTRY

NOTE: Segmentation sorted alphabetically

# Category Overview

## 1. Category Performance

The Fresh Meat market has grown to a valuation of £15.8bn but is heavily driven by volume price inflation due to supply chain pressures, particularly in larger categories such as Beef, Poultry, & Lamb. Scotland now holds a 9.3% share of the total market, closing in on a £1.5bn valuation, but has also endured similar challenges. Some shoppers appear to have turned away from the category due to soaring prices, while there may also have been an element of trading down to cheaper proteins and cuts within the category, as certain segments in Poultry and Pork have seen a significant increase in demand. Retailers have continued to promote but have struggled to increase demand overall.

## 2. Route to Market

Grocery Multiples continues to account for roughly £49 in every £50 spent on the Meat & Poultry category, with no signs of reducing its share. Inflation continues to be more prominent in Supermarkets, while the Impulse channel continues to struggle from its lower base to become competitive. That said, if inflationary pressures persist within Mults, more convenience/high street-led shopping channels could become more competitive, but right now, targeting “supermarket-first” distribution will be key for volume.

## 3. Brands Vs Private Label

Private Label dominates the Meat & Poultry market, with shares frequently above the 90% mark in most areas. However, Brands continue to be more important to Scots.  Branded shares within the Meat categories are always higher in Scotland, reaching as high as 3x, as seen in the Treated & Prepared space. The Scottish market has a greater number of domestic brands due to a strong consumer interest in provenance. Venison & Sausages are example categories where Scottish producers are in abundance within the branded space.

## 4. Consumer Attitudes and Behaviour

Provenance remains an interesting avenue that commands a premium, particularly among Scottish shoppers who have a high propensity to buy domestic produce, as more than 5 of every 6 Scots claim they would like to be able to buy local more often while shopping. Nutrition is also of importance to shoppers, with nutrient-dense meals appealing to almost 50% of shoppers, an area where Meat & Poultry may have yet to fully communicate its benefits. There is also an ongoing premiumisation of the market, exemplified by Morrisons’ premium private label development. As retailers aim to cater to those consumers who want to recreate the restaurant occasion at home.  Value will also remain important, with prices growing at 8%, so offering more affordable alternatives, such as cheaper cuts, will be important, along with inspiration in terms of how to cook.

# Category Overview

MEAT & POULTRY CATEGORY REPORT

It has been a record-breaking year for the Meat & Poultry sector from multiple points of view. Supply chains have struggled, but volume pricing has soared, seeing exports break £4bn in sales for dairy & red meat. Consumer sentiment is also on the rise, which should hopefully contribute further to the retailers' approach to provenance.

**Meat & Poultry Sector Headlines 2025**

Shrinking herds and rising costs: The beef market is in turmoil - and inflation is spiralling

Record high £4 billion for UK dairy and red meat exports

Consumer positivity towards British agriculture hits new high in 2025

Rising demand for livestock feed drives compound feed market growth

 Sources: Referenced in Bibliography

THE KNOWLEDGE BANK

## Food and Drink Inflation 2025 / 26 / 27

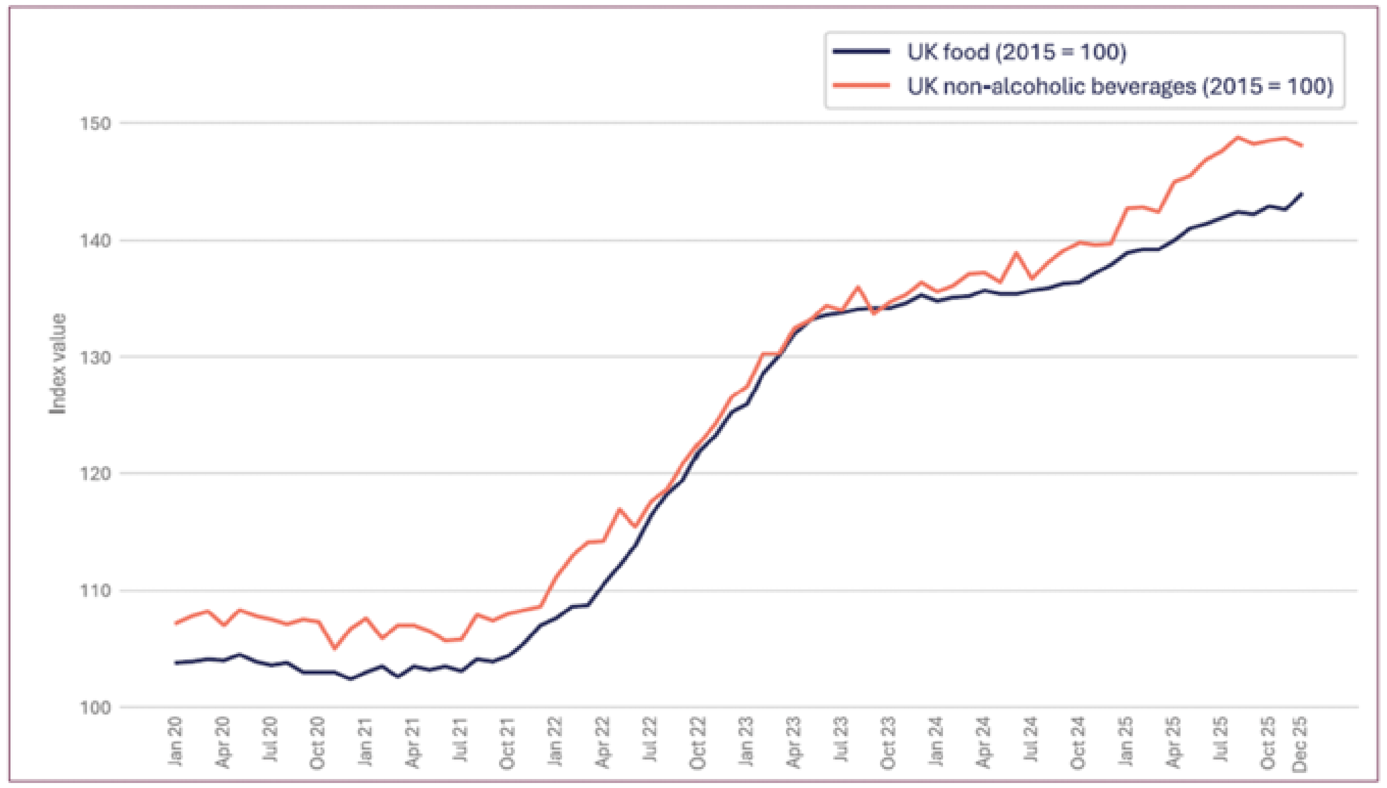
Food and non-alcoholic beverages prices **rose by 4.5%** in the 12 months to December 2025, **up from 4.2%** in the 12 months to November, according to ONS figures released on 20 January.

In the latest forecast from the IGD, retail food and drink **prices will rise by 3.3-4.3% in 2026**, with a mid-case average of 3.8%. An average of 3.8% food inflation in 2026 could add about £10bn to UK grocery bills.

In **2027 the projection is 2.8-3.8%,** with a mid-case average of 3.3%.

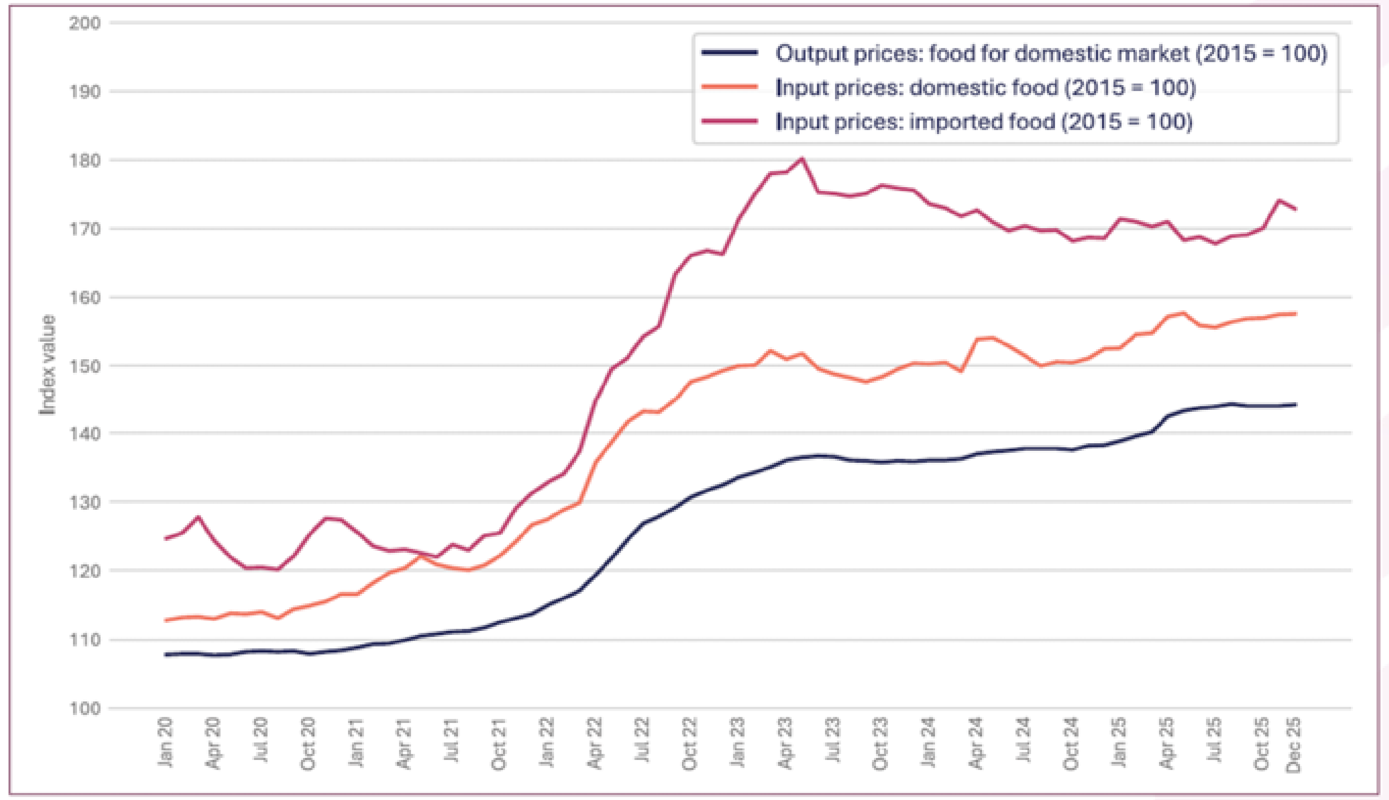
According to the ONS the gap between (high) input prices and relatively lower producer output prices has been maintained for 2.5 years.

### UK Food and Non-alcoholic Drink Inflation (CPIH) Index




Source: ONS Jan 2026

### UK Producer Prices (PPI) Index




Source: ONS Jan 2026

### Shoppers 2026

Living standards will remain under pressure, with real household disposable income per person expected to stay below pre-pandemic levels. With income tax thresholds frozen until 2031, wage growth will push more people into higher tax brackets, hitting middle- and higher-income groups hardest.

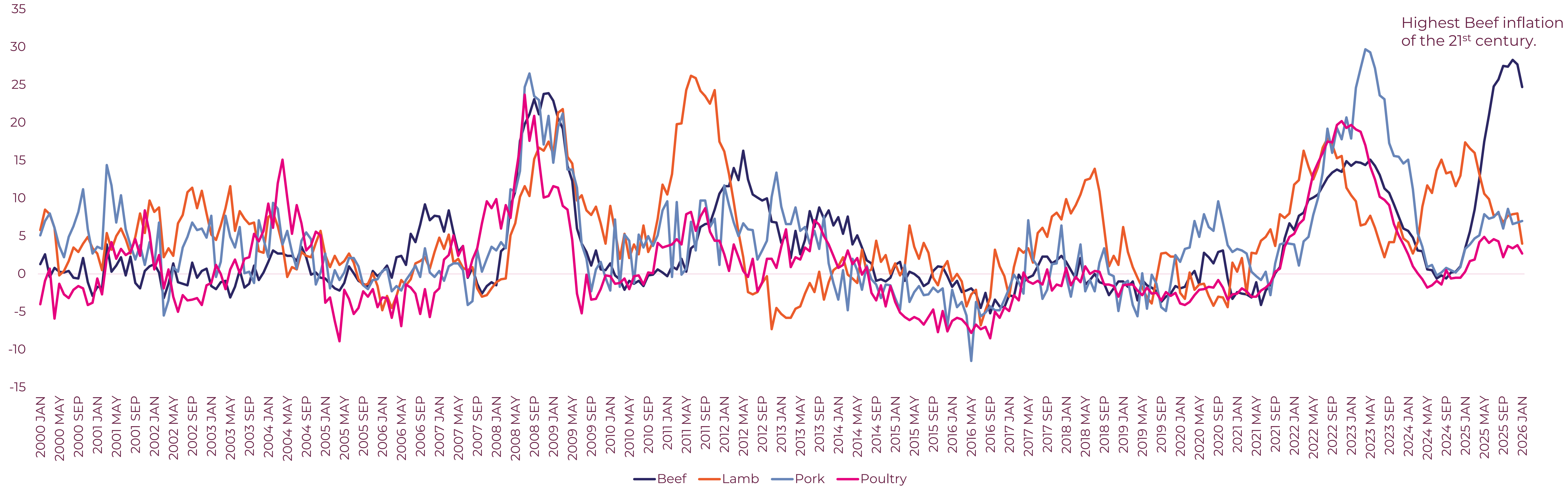
With fiscal tightening set to continue and external shocks ever present, confidence is expected to remain muted as household incomes remain static. Shopper confidence is expected to remain fragile, with more consumers planning to cut back on away-from-home spending in 2026.

Source: ONS Dec 2025

MEAT & POULTRY CATEGORY REPORT

## Look specifically at inflation, Beef has soared above other meat types, surpassing its previous 21st century highs seen during the global financial crisis of 2008/2009. Lamb inflation peaked in early 2025, while Pork and Poultry have been largely in line with total food inflation.

**Inflationary & Supply Chain Pressures - RPI:Percentage change over 12 months by Meat Type**




 Sources: Inflation and price indices - Office for National Statistics

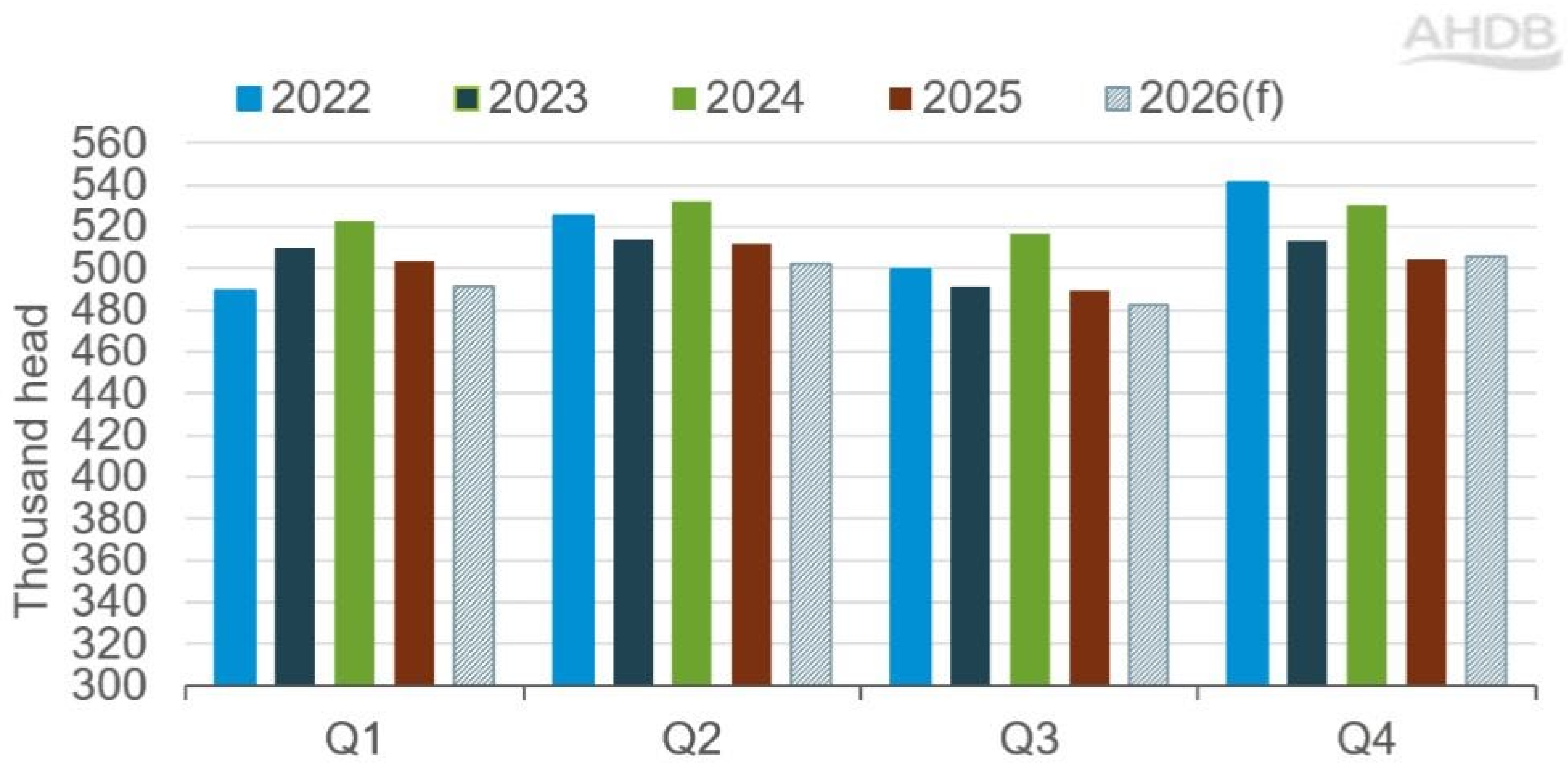
THE KNOWLEDGE BANK
Turning insight into action

MEAT & POULTRY CATEGORY REPORT

# The UK beef sector is facing a supply squeeze as a shrinking national herd leaves fewer cattle available for the market. High feed costs are also a problem as demand grows, so farmers are reducing feed volumes to protect their margins against these rising pressures, but this translates to end-of-chain price increases for shoppers.

## Supply Chain Issues

### Actual and Forecast (f) UK Prime Cattle Slaughter




In 2025, prime cattle slaughter fell 4.4% to 2.01 million head, with steers seeing the sharpest decline at 5.6%. This shortage was caused by a shrinking national herd and high processing rates in 2024, which left fewer cattle available for the market.

Demand for cattle and sheep feed is rising as lower energy and grain prices improve producer margins. Resultedly, the market faces a global grain deficit & high straw costs.

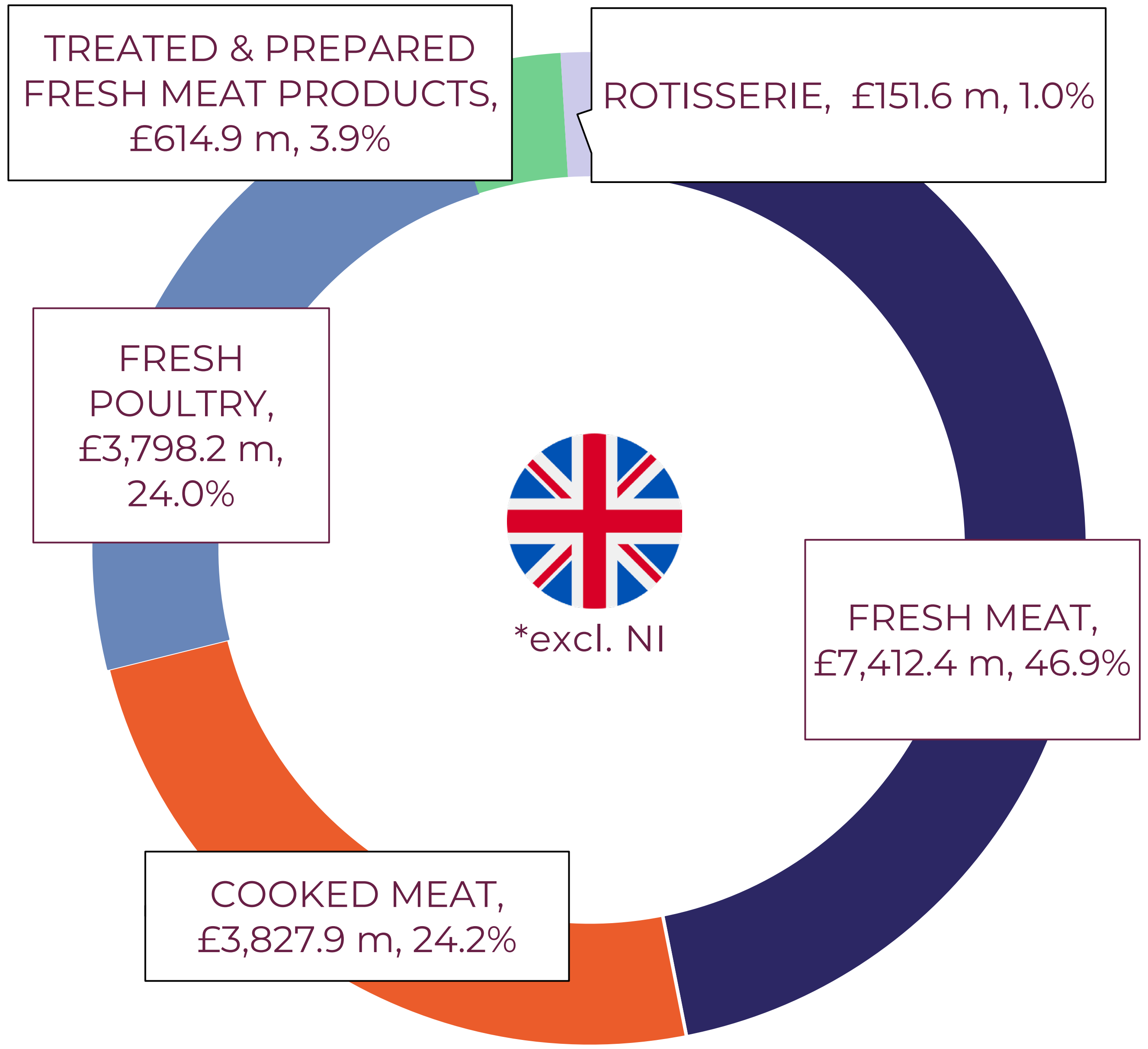
To manage these pressures, farmers are encouraged to adopt flexible feed rations and adjust to higher baseline costs for inputs. While the medium-term outlook for grain prices remains bullish due to tight global supplies, an abundance of soy may cap costs. Long-term risks include geopolitical trade disruptions and new carbon taxes (CBAM) set for 2027, which could keep fertilizer prices elevated.

 Sources: AHDB, February 2026 (References in Bibliography)

In retail, the total Meat & Poultry market has reached a valuation of £15.82bn, driven significantly by supply chain pressures, which have contributed to strong increases in volume prices YoY.

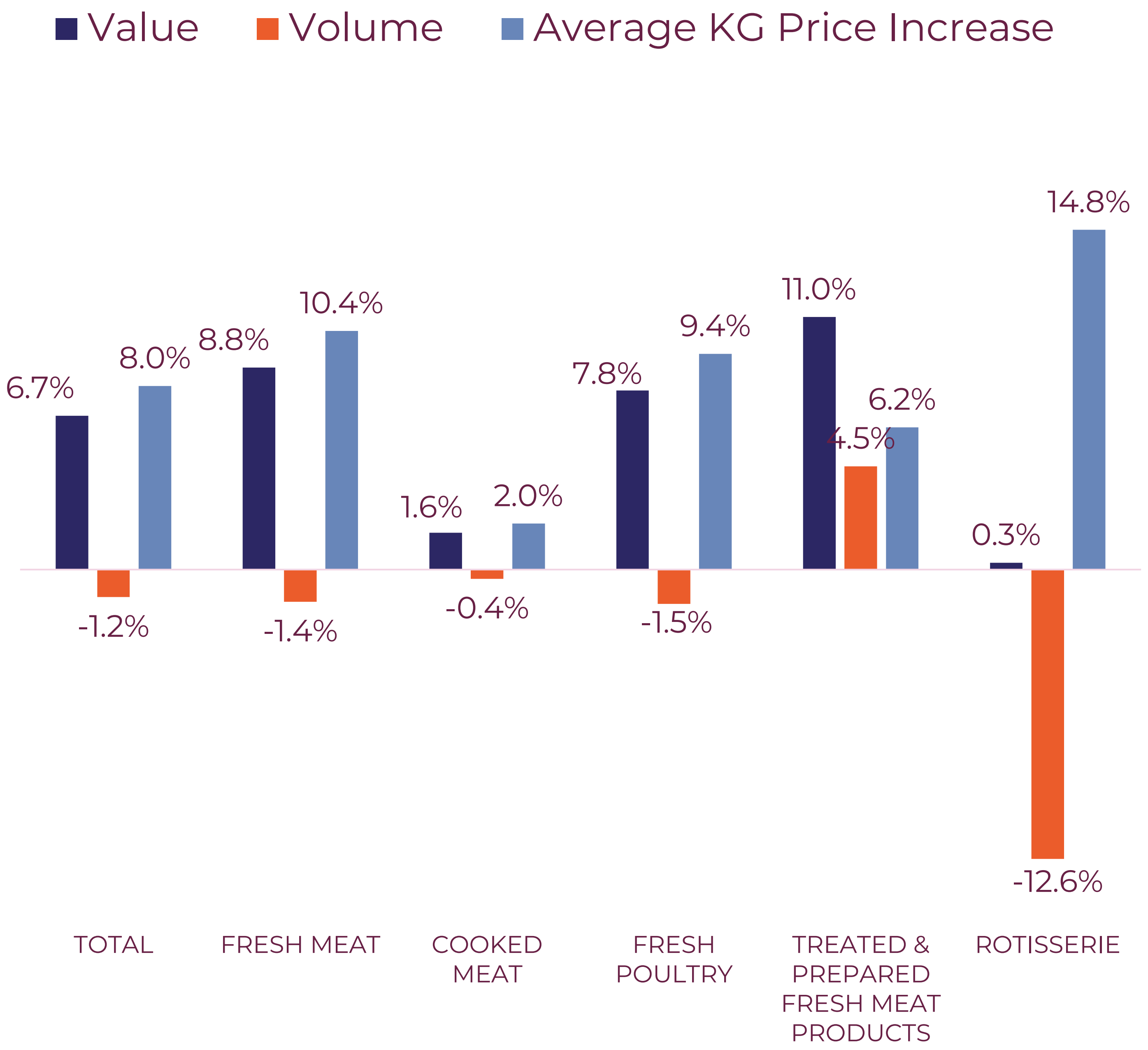
Most of the sectors have sold less volume over the past year. Rotisseries chicken is under significant pressure after experiencing the largest price increases. Treated and Prepared Meats have performed the best after experiencing the least inflation.

**Total GB Meat & Poultry Market Value Breakdown by Sector (£m)***




**Total Market Value: £15.82bn**

**Total Meat & Poultry Year-on-Year Change (%) by Value (£), Volume (KG), & Average KG Price Increase (£)**





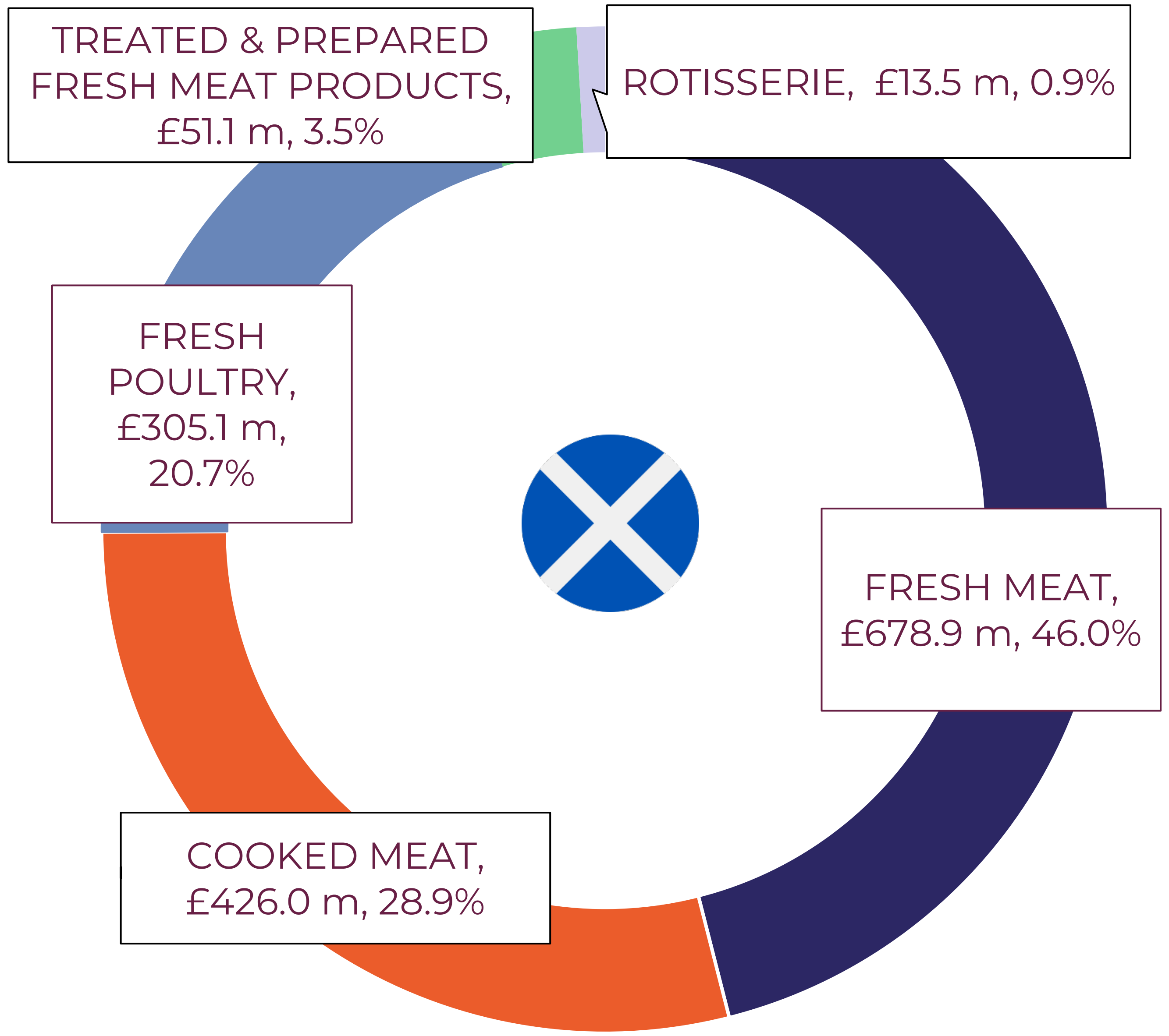

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026

In Scotland, the market is closing in on a £1.5bn valuation, growing slightly below GB rate, but is ultimately driven by similar inflationary pressures.

Among individual sectors, Cooked Meat indexes higher among Scots, where convenience preferences may be higher, while Poultry under indexes vs total GB.

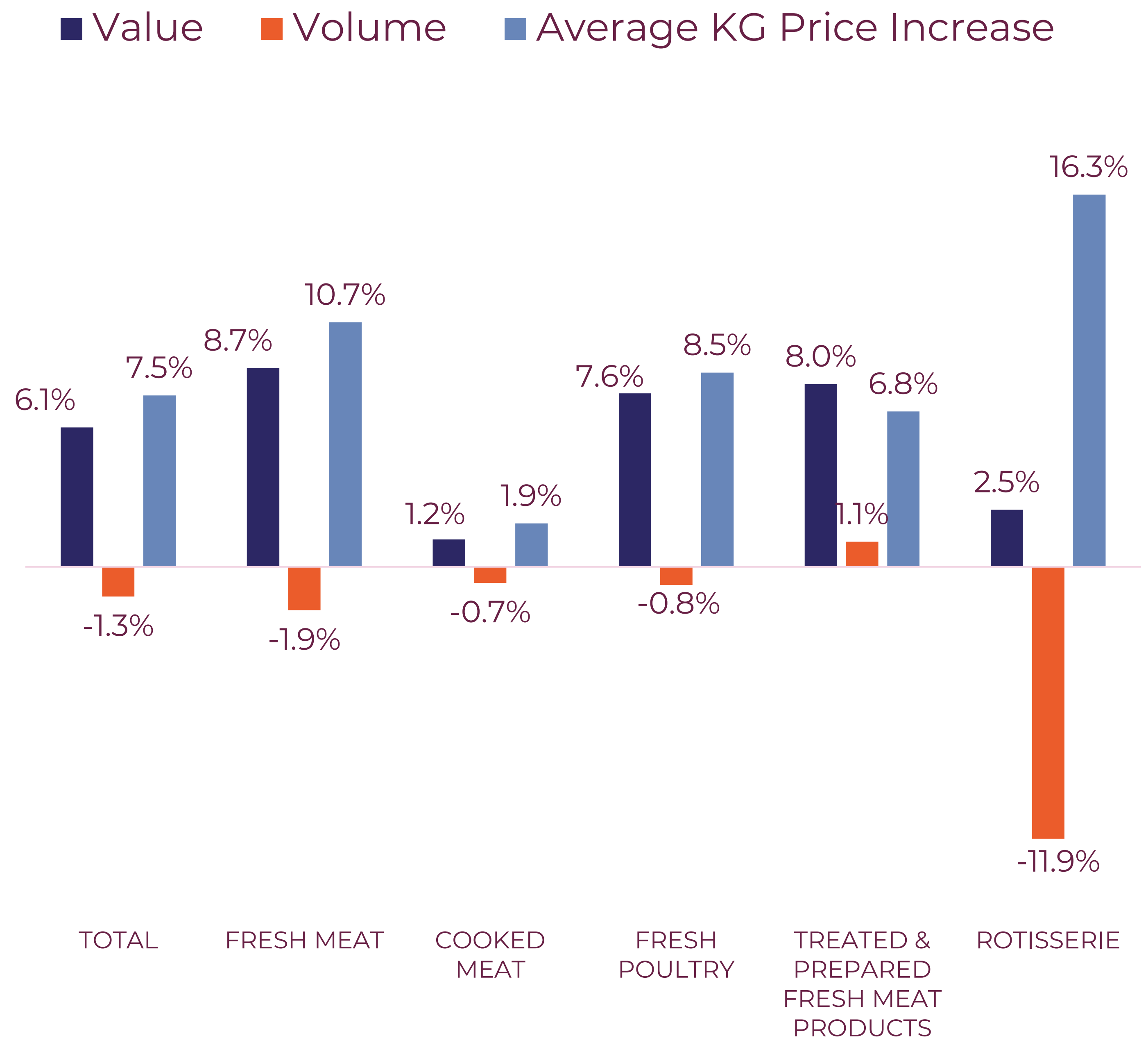
Like GB, only Treated & Prepared Fresh Meat products saw volume growth.

**Total Scotland Meat & Poultry Market Value Breakdown by Sector (£m)***




**Total Market Value: £1.47bn**

**Total Meat & Poultry Year-on-Year Change (%) by Value (£), Volume (KG), & Average KG Price Increase (£)**



## Total Meat & Poultry Market Share Breakdown by Region & Sector (£m)

| Region | Total | Fresh Meat | Cooked Meat | Fresh Poultry | Treated & Prepared Fresh Meat | Rotisserie |
|---|---|---|---|---|---|---|
| Central | 14.5% | 14.5% | 14.3% | 14.8% | 14.1% | 13.9% |
| East of England | 8.1% | 8.3% | 7.8% | 8.1% | 8.3% | 6.1% |
| Lancashire & Border | 11.9% | 11.8% | 12.3% | 11.4% | 12.3% | 16.4% |
| London | 19.6% | 19.0% | 17.7% | 22.9% | 18.8% | 18.1% |
| Northeast | 4.7% | 4.8% | 4.9% | 4.3% | 4.7% | 6.9% |
| South & Southeast | 10.3% | 10.6% | 10.1% | 10.1% | 11.4% | 6.9% |
| Southwest | 3.4% | 3.5% | 3.3% | 3.1% | 3.5% | 2.6% |
| Wales & West | 8.8% | 9.0% | 8.8% | 8.4% | 9.1% | 8.1% |
| Yorkshire | 9.4% | 9.5% | 9.7% | 8.9% | 9.5% | 12.2% |
| **Scotland** | **9.3%** | **9.2%** | **11.1%** | **8.0%** | **8.3%** | **8.9%** |



THE KNOWLEDGE BANK
Turning insight into action

Scotland holds a 9.3% share of the Meat & Poultry market. Only Cooked Meat holds a higher share among sectors, showing how much that sector holds value in Scotland.

Overall, and compared to Scotland's 8.3% share of the GB population, Scotland's overtrade within the market is equal to roughly £158m, again heavily driven by Cooked Meat, but also Fresh Meat holding a 9.2% share.

Source: Nielsen Total Coverage GB – 52w/e 24 January 2026
ONS, Population Figures, 2022 Population estimates for the UK, England, Wales, Scotland, and Northern Ireland - Office for National Statistics (ons.gov.uk)

Within all Meat categories, Branded share of the market is notably higher in Scotland than at GB level.

Fresh Meat, for example, sees brand share almost double in Scotland vs GB, while T&P share triples. This is helped largely by brands like Simon Howie, Malcolm Allan, Lawson's, Highland Game & We Hae Meat who continue to hold significant share & distribution in Scotland. Many of these brands will be eyeing expansion south of the border, particularly those that have grown.




Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026

## Total Meat & Poultry Promotional Activity: GB

**Key**

**Promo Sales (%)**
Promo Sales (£)
(YoY £ growth)

**Total**
*excl. NI

**25.1%**
£3.89bn
(+6.7% YoY)

**Fresh Meat**
**24.0%**
£1.26bn
(+11.0% YoY)

**Cooked Meat**
**27.3%**
£1.01bn
(+9.1% YoY)

**Fresh Poultry**
**20.2%**
£762.4m
(+3.0% YoY)

**T&P Meat**
**36.8%**
£221.9m
(+12.8% YoY)

**Rotisserie**
**24.5%**
£36.9 m
(-3.6% YoY)

Despite significant supply chain pressures, promo sales have increased YoY, as total meat & poultry sales under promotion close in on a £4bn valuation. With a 6.7% rate of growth, this was however significantly lower than last year's reporting, where promo sales grew by 18.3%, suggesting a deceleration in activity.

Meat categories were very influential here, all pushing more promo growth than category average. Poultry grew promo sales, but below market rate, while only Rotisserie saw a reduction YoY in activity.

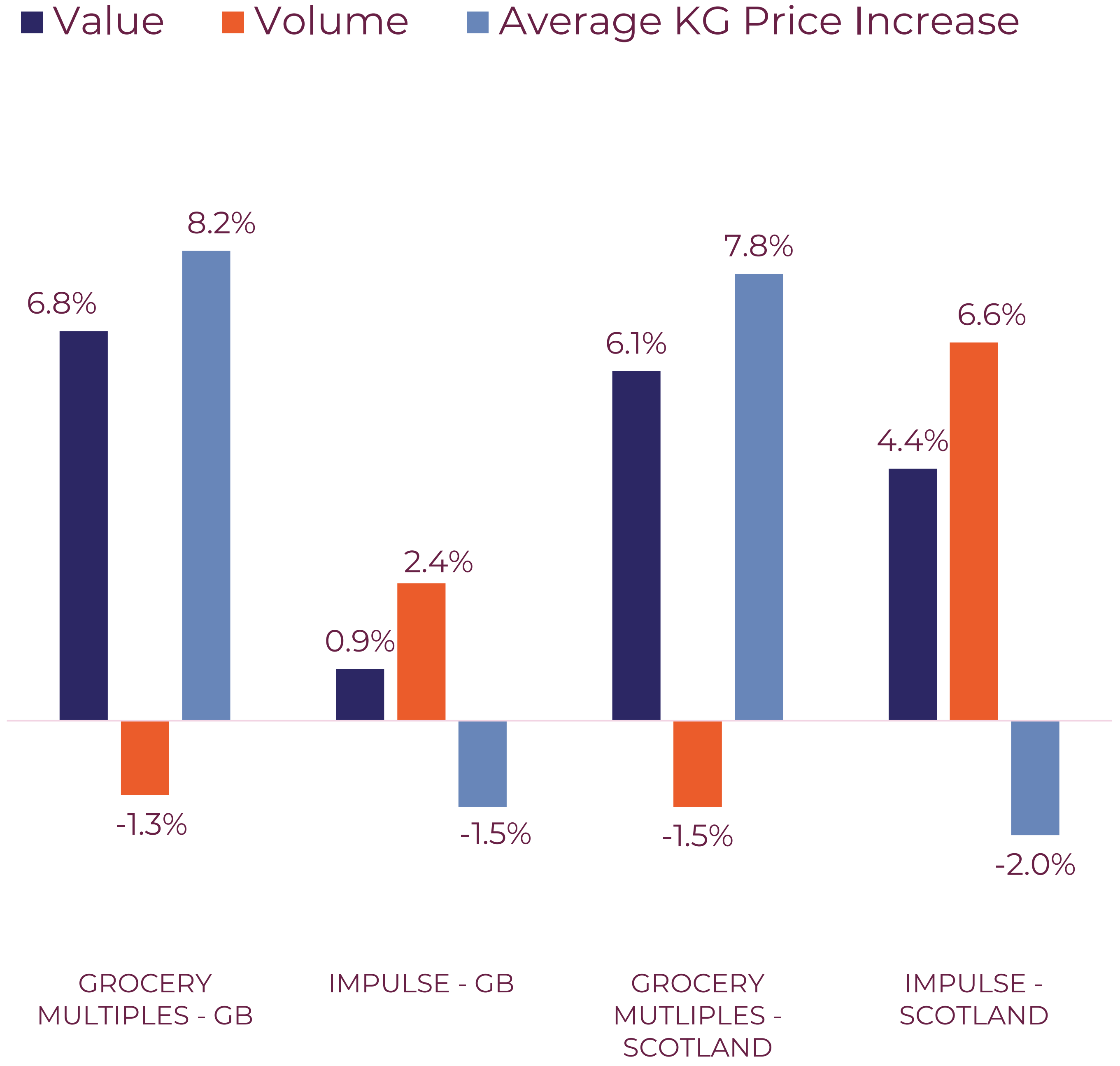
Source: Nielsen Total Grocery Multiples GB
52 w/e 24 January 2026

Grocery Multiples continue to have a strong hold on the market value, gaining share on the Impulse channel,  especially in the wider GB market, where growth has been slower YoY.

Impulse sales have performed better in Scotland, where they have experienced strong volume growth, supported by a greater reduction in average price per kilo vs the wider GB Impulse market.

**Total Meat & Poultry Breakdown by Market Channels (£m)**


**Total Meat & Poultry Market Channels Year-on-Year Change (%) by Value (£), Volume (KG), & Average KG Price Increase (£)**






Source: Nielsen Total Coverage GB/Scotland – 52 w/e 24 January 2026

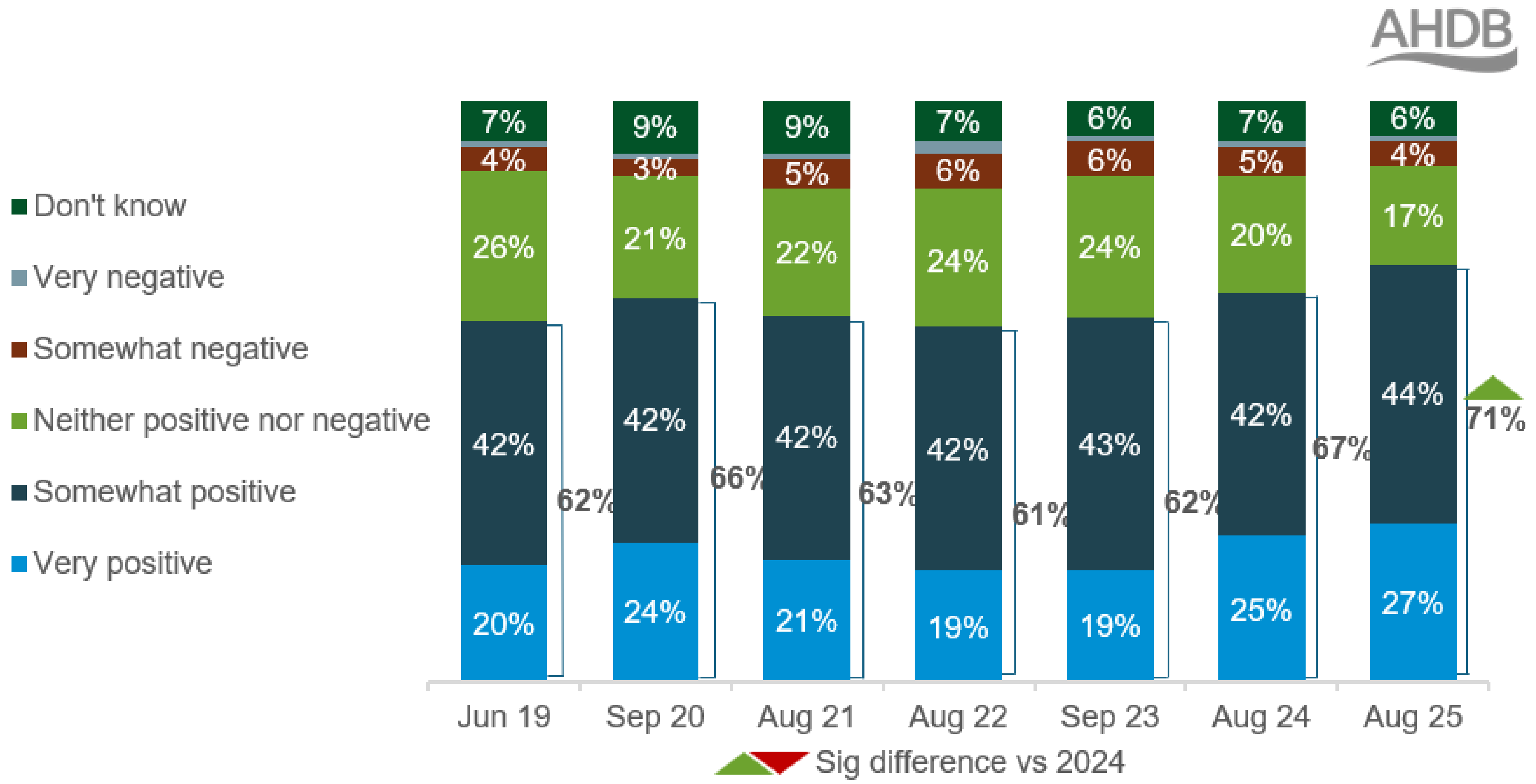
THE KNOWLEDGE BANK

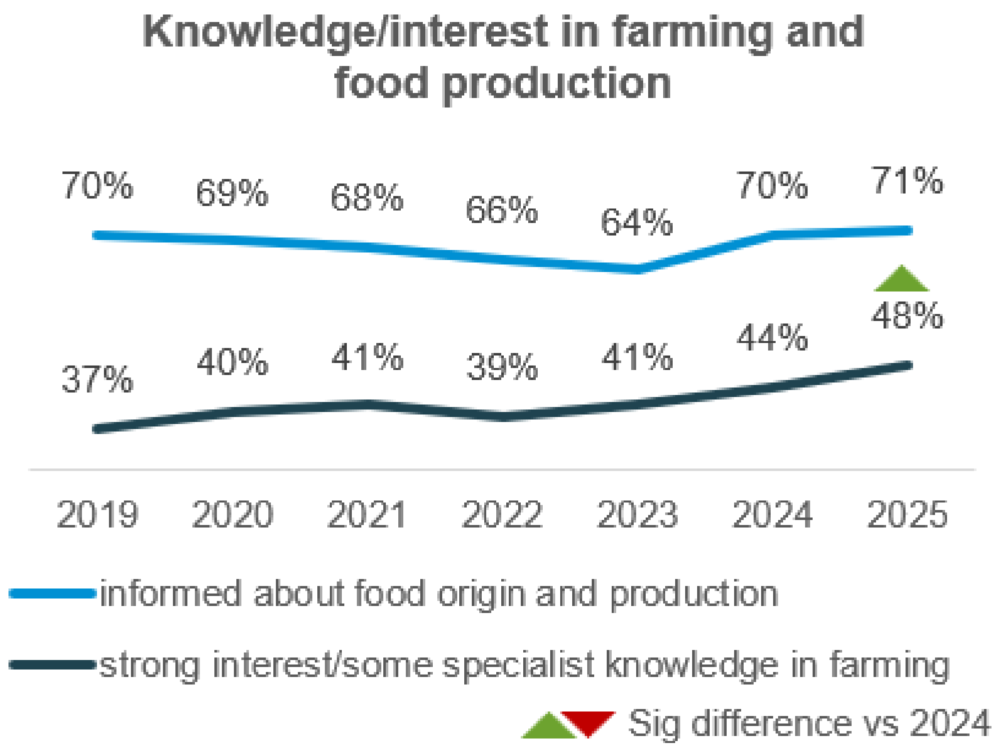
Delivered by
**Scotland Food & Drink Partnership**

# How are consumers feeling?

# Despite record inflation, consumer positivity towards British agriculture reached a record 71% in 2025. With 77% of shoppers now trusting farmers, there is a growing appetite for transparency and provenance.

## Public Trust in Farming on the rise




| Age group | % with strong interest/some specialist knowledge in farming |
|---|---|
| 18–24 | 58% |
| 25–34 | 78% |
| 65+ | 29% |
| **Average** | **48%** |

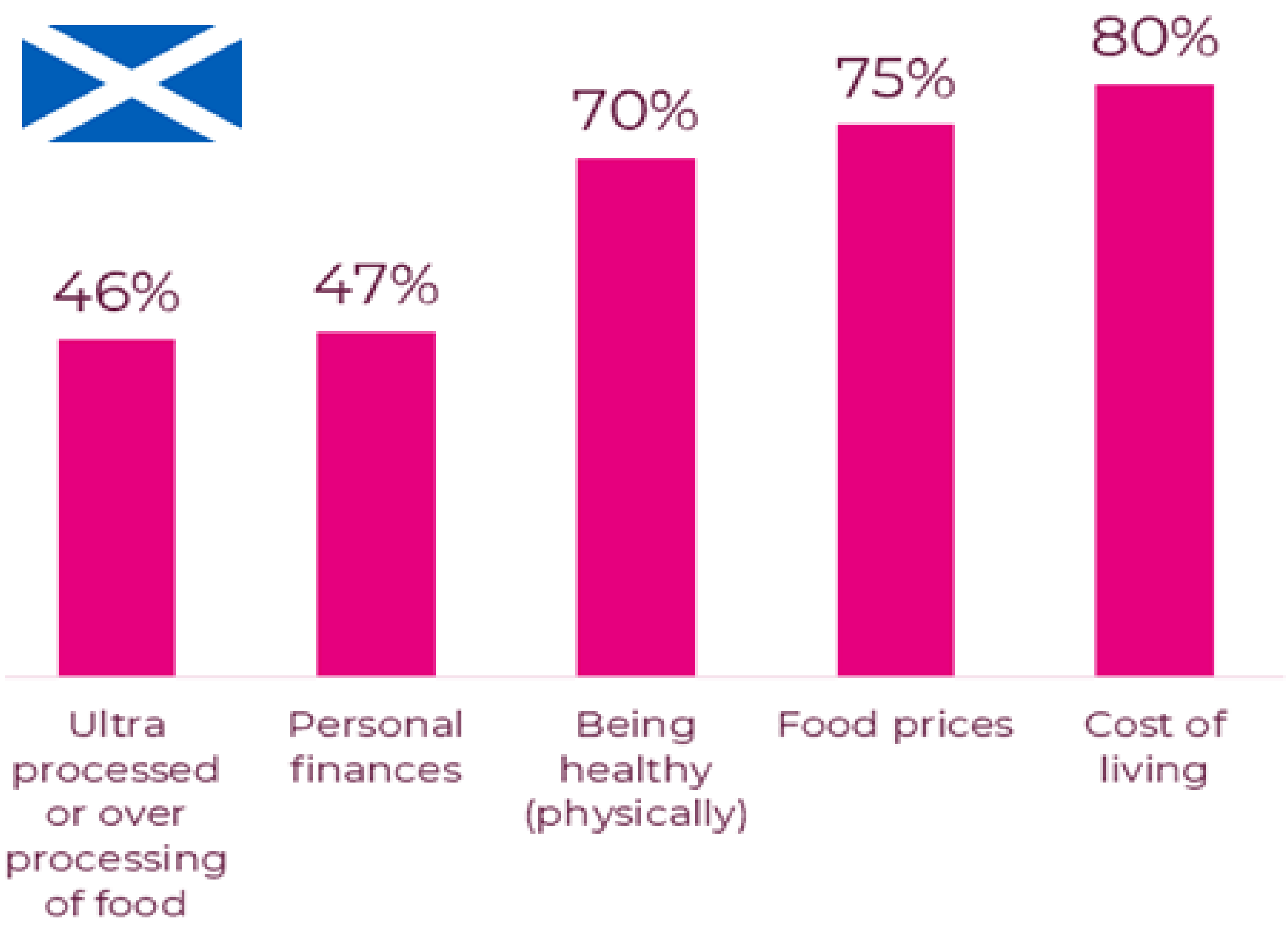
**Trust in British farming is at a record high**, with farmers seen as experts, caring for their livestock and the environment.

**Interest and knowledge about food production are rising**, especially among younger consumers.

 Sources: Consumer positivity towards British agriculture hits new high in 2025 | AHDB

The Knowledge Bank’s bespoke Scottish Shopper Tracker shows that worries over finances and the economy account for three of the top five concerns at the start of 2026 – the other two are health related.

## Top 5 Current Concerns Amongst Scottish Shoppers




| | | |
|---|---|---|
| Frequency 258 Trips | +4.0% | vs YA |
| Spend per trip £19.50 | -0.4% | vs YA |
| Units per trip 9.3 items | -4.2% | vs YA |

The ‘little and often’ purchasing habit continues as consumers look to control their cashflow and cut down on food waste.

 Sources: The Knowledge Bank Scottish Consumer Tracker Dec 2025, NiQ Homescan 52 w/e 27.12.25

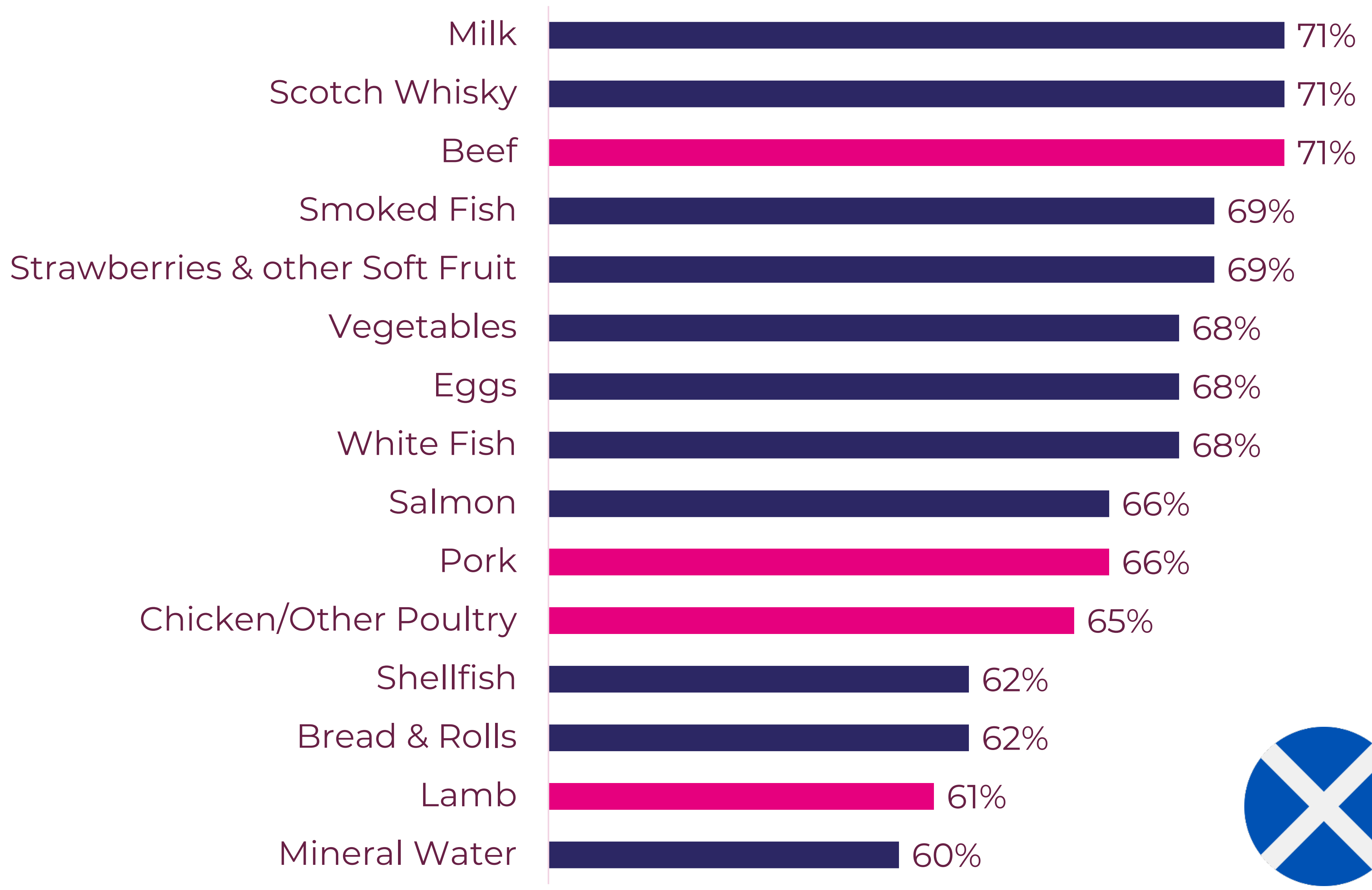
## Scottish people have a strong affinity with domestically produced goods; 5 in every 6 shoppers claim they would like to buy food produced in Scotland. Looking specifically at Meat, roughly two-thirds of shoppers would be more likely to buy Meat & Poultry if they knew it came from Scotland, suggesting there is ample demand for Scottish meat.

### The Importance of Provenance to Shoppers

**84%**

...of Scots would like to buy more food & drink produced in Scotland when grocery shopping (an increase from 82% in 2023)

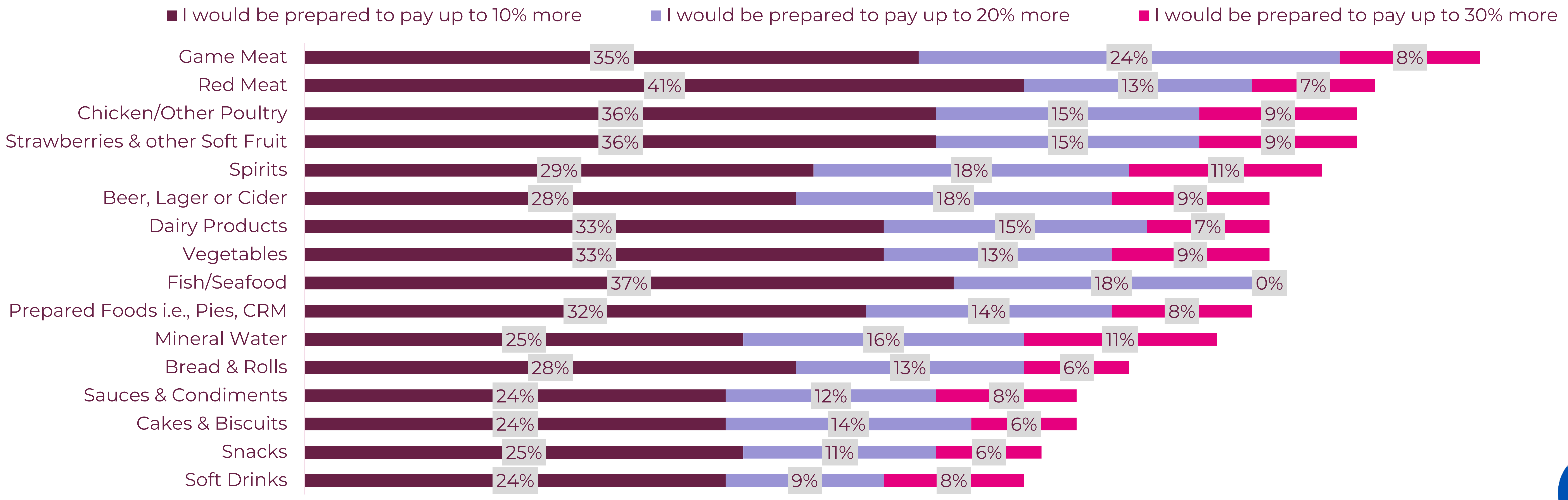
**Percentage more likely to buy if they know it's made in Scotland – Top 15**




 Source: Provenance Research, July 2025, 56 Degree Insight for the Knowledge Bank

# Looking deeper, many shoppers claim they would also pay a premium for products if they came from Scotland, with Game & Red Meat, as well as Chicken/Other Poultry leading across all categories.

## Willingness to Pay 'Premiums' for Provenance

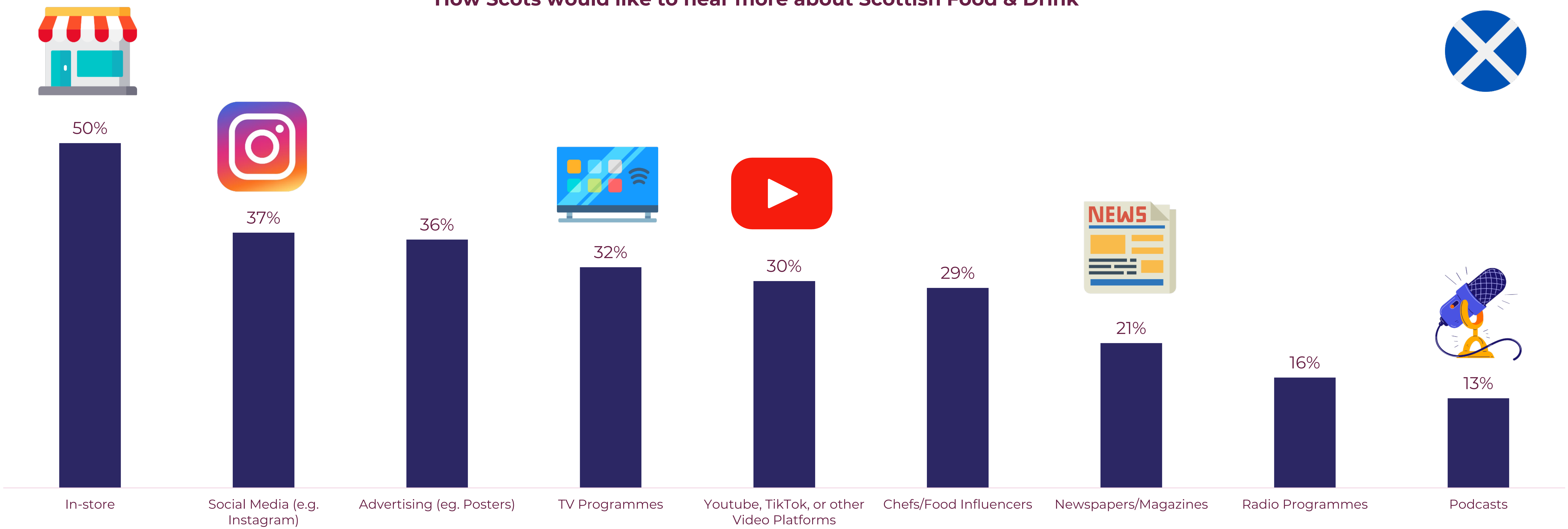



 Source: Provenance Research, July 2025, 56 Degree Insight for the Knowledge Bank

MEAT & POULTRY CATEGORY REPORT

# Traditional in-store activation remains the most preferred option for Scots to hear about domestic produce; however, there is now a greater preference to hear more through social media vs traditional forms such as TV, Newspapers and Radio.

## How Scots would like to hear more about Scottish Food & Drink




 Source: Provenance Research, July 2025, 56 Degree Insight for the Knowledge Bank

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

- QMS Brand Research 2025 EssenceMediacom

- Nationally representative online sample of 1,000 Scottish adults (18+).
- Focus on understanding the drivers and barriers to visiting local butchers for red meat purchases, as well as shopper purchase habits and motivations.

QMS
Quality Meat Scotland

# Most Scottish consumers want convenience when preparing food and are willing to try new recipes. They care about what they eat, carefully reading ingredient labels and food origin.

**69%**
**I like food which can be prepared quickly and easily**

**65%**
**I like to try new recipes**

**64%**
**I prefer to prepare my meals from scratch**

**63%**
**I often read labels to see the list of ingredients**

**58%**
**I like to look out for where my products are made or grown**

**55%**
**Quality meat is too expensive**

While over half feel financial pressure when buying quality meat, nearly half do not, suggesting a willingness to pay for premium products.





Source: QMS Butchers Research with Essence Mediacom 2025. 1001 Scottish Respondents. Q. Please indicate the extent to which you agree or disagree with each the following statements: NET Agree

# Price and appearance are most likely to influence where Scots buy red meat, while animal welfare and Scottish provenance are ranked high as well.

**What factors influence your decision when choosing where to buy red meat? %NET Important**

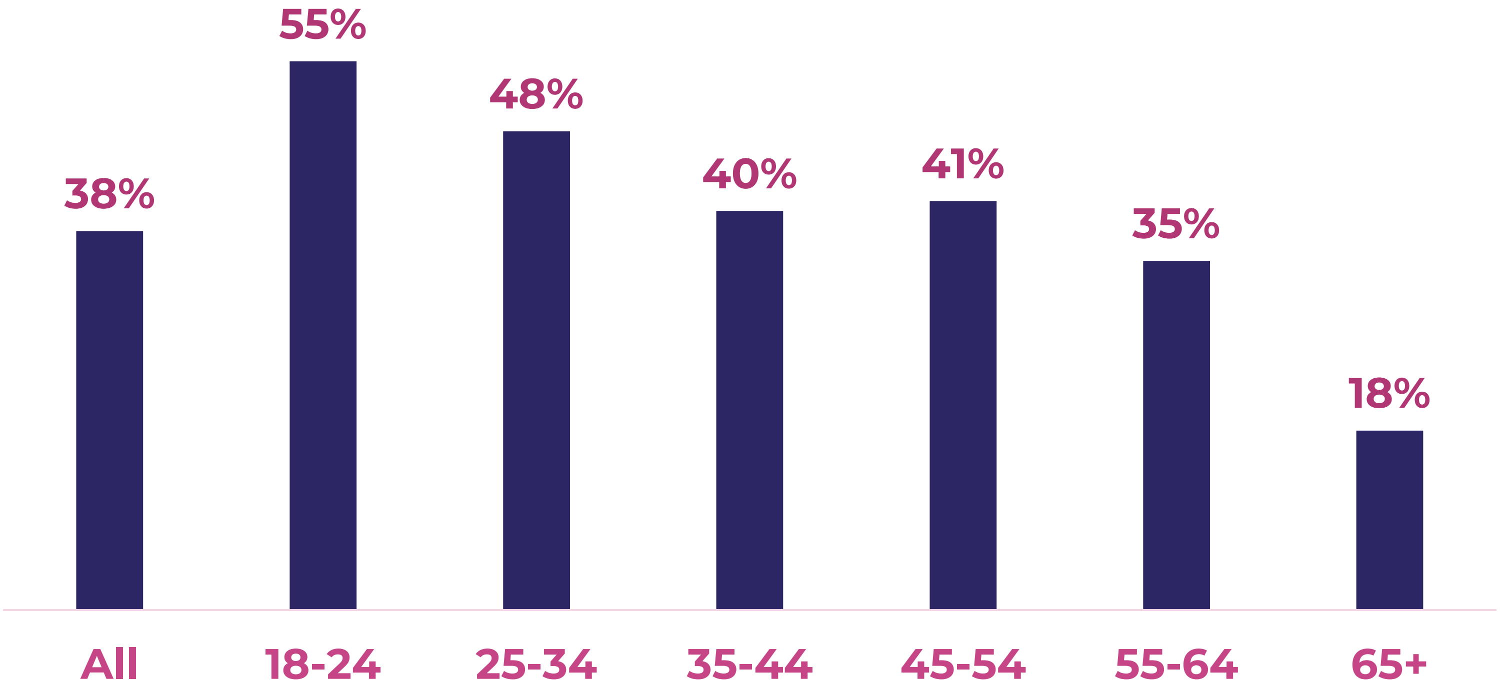



Source: QMS Butchers Research with Essence Mediacom 2025. 1001 Scottish Respondents

# Most respondents (93%) take product labels into consideration when buying food. Provenance and animal welfare rank highly…

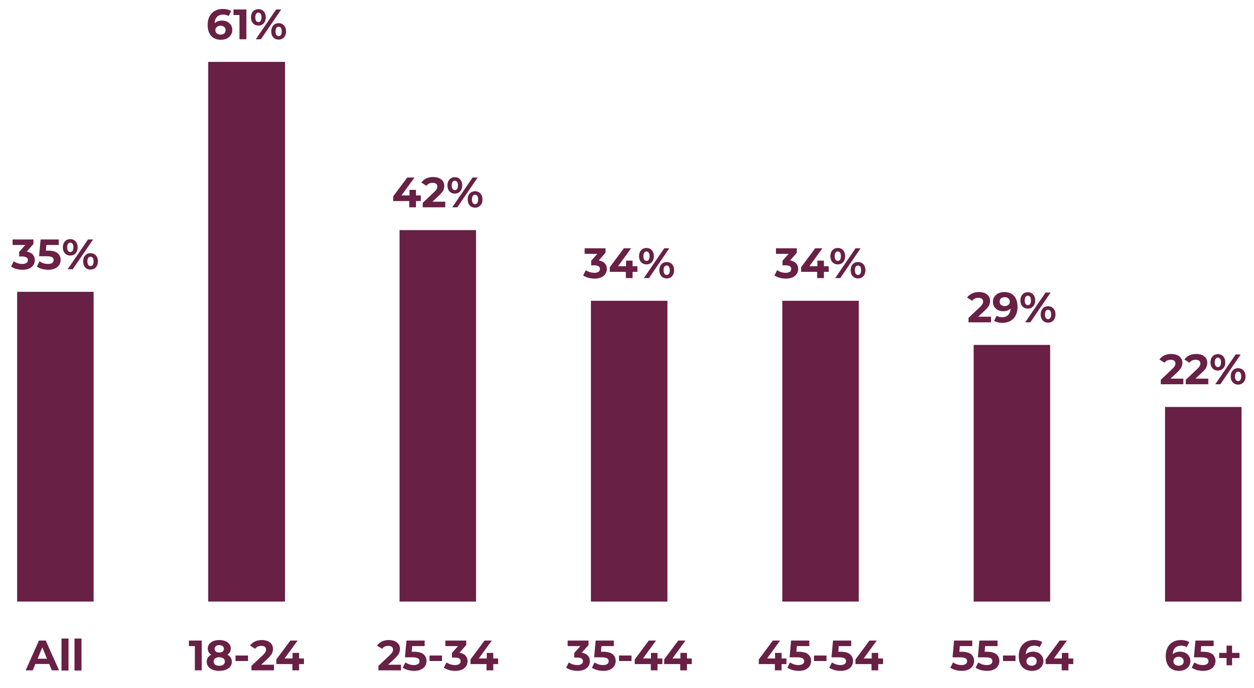
Younger adults are more likely to make "fakeaways", which are quick and easy to prepare and often include meat, such as pasta dishes, burgers and meatballs.

**"I like to make fakeaways (homemade style takeaways)"**
**% NET Agree**




Younger adults are the most likely to intend to go to a butchers in the next 12 months, highlighting their increasing demand for premium meat.

**"I intend to go to the butchers more in the next 12 months"**
**%NET Agree**






Source: QMS Butchers Research with Essence Mediacom 2025. 1001 Scottish Respondents

Quality Meat Scotland

THE KNOWLEDGE BANK

Turning insight into action

# Supporting Scottish farmers and the local economy is the main reason consumers choose Scottish red meat over imports, while Scots trust local produce for high quality, traceability and freshness.

**1st 74%**
Supporting Scottish farmers

**2nd 72%**
Supporting the Scottish economy

**3rd 66%**
Locally sourced

**4th 54%**
Higher quality

**5th 54%**
You know where it comes from (traceability)

**6th 52%**
Fresher





Source: QMS survey 2025. 1000 Scottish Respondents (aged 16+) that at least sometimes eat red meat

# About QMS

QMS is the public body responsible for helping the Scottish red meat sector improve its **efficiency, sustainability, integrity and profitability and maximise** its contribution to Scotland's economy.


**Our Brands**
We market the PGI labelled Scotch Beef and Scotch Lamb brands and promote Scottish pork products under the Specially Selected Pork Banner.

**Quality Assurance**
Our quality assurance schemes underpin the integrity of our brands and reassure consumers of provenance and the highest standards of production.

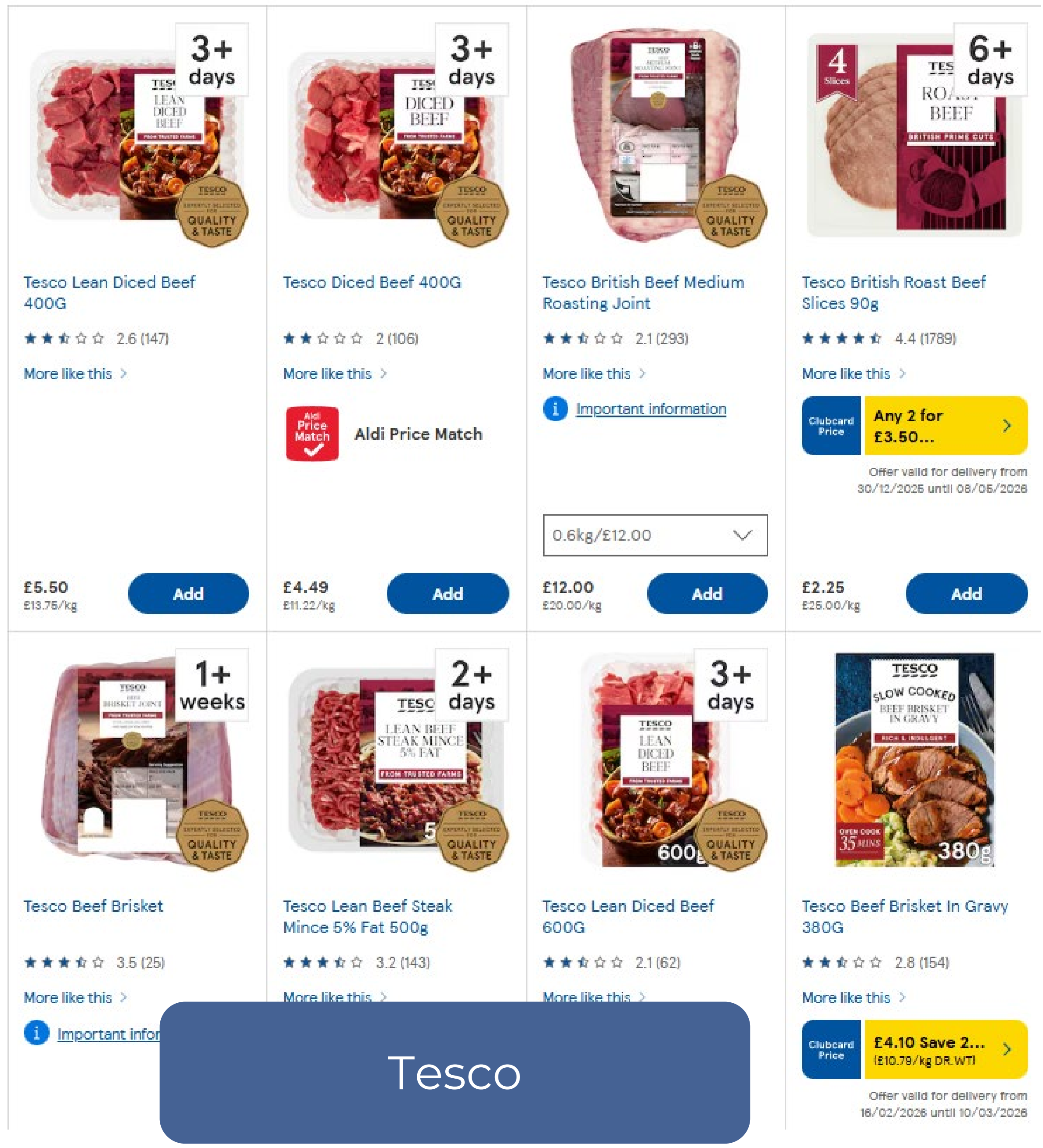
**Market Intelligence**
We work with producers and the supply chain to increase productivity and profitability throughout the red meat value chain. Check out the latest market developments with commentary from the QMS team, or drop us an email with any specific red meat insight needs you'd like to discuss.

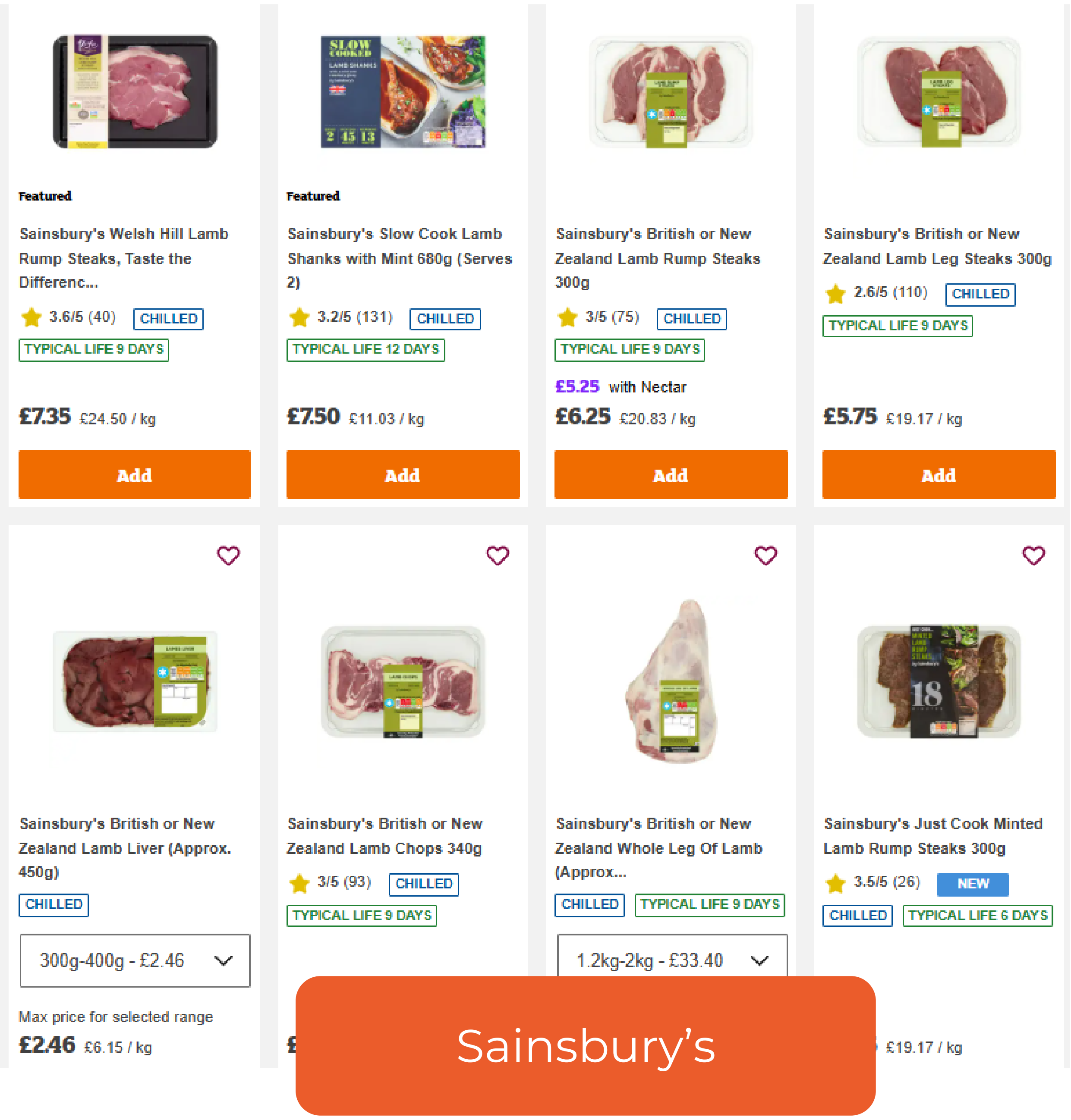
For more information, please visit us at qmscotland.co.uk or email info@qmscotland.co.uk

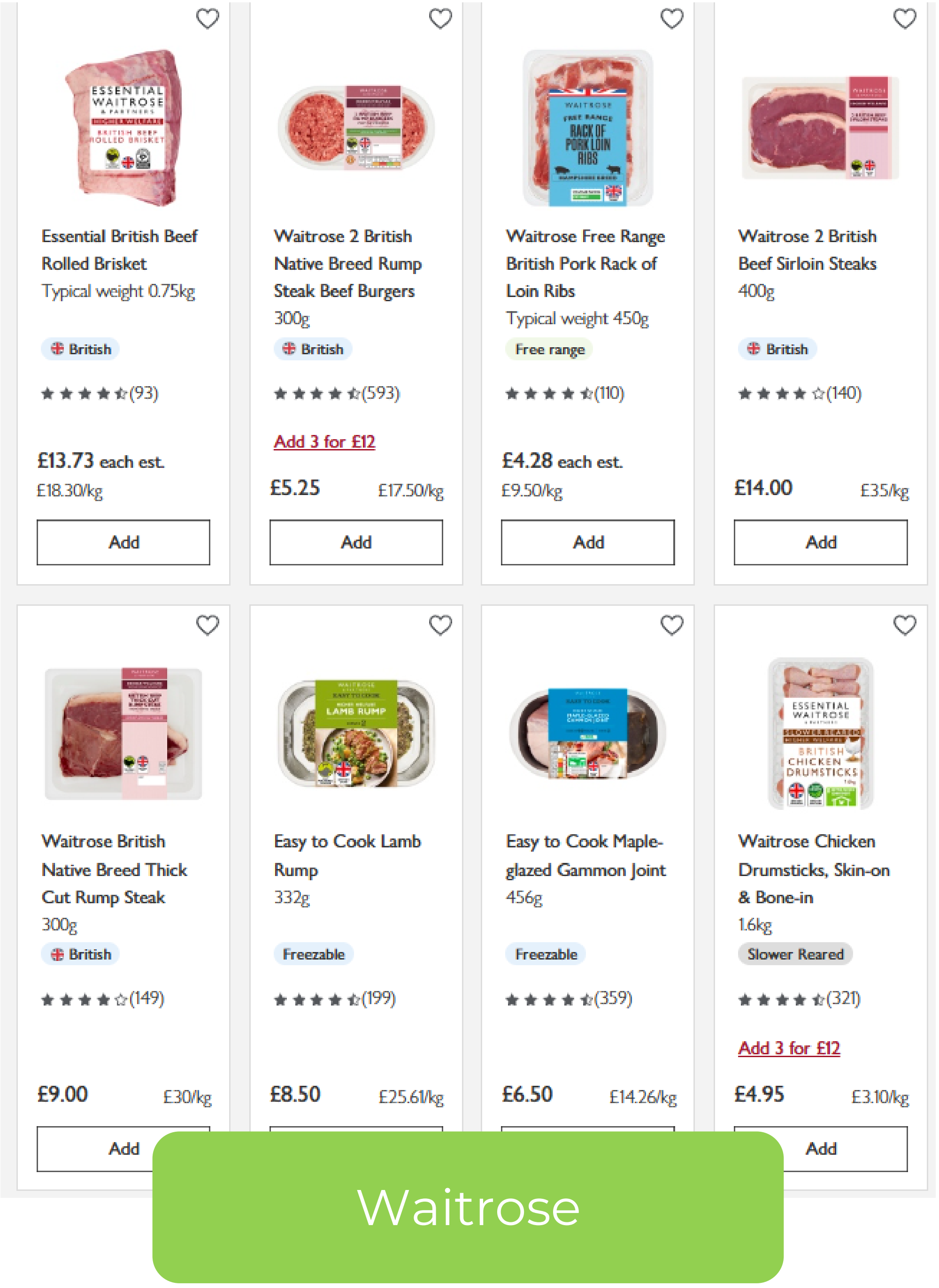
MEAT & POULTRY CATEGORY REPORT

# Promos vary per retailer by mechanics & category. Multibuy offerings appear key to the T&P Meats category (which has pushed volume YoY), occurring within the Cooked/T&P Meats space in Tesco and the Poultry space in Waitrose. Sainsbury's on the other hand offers frequent price reductions through its Nectar scheme.

## Promo Mechanics within Meat & Poultry




 Source: Retailer Online Catalogues, 2026

MEAT & POULTRY CATEGORY REPORT

THE KNOWLEDGE BANK
Turning insight into action

# The rise of GLP-1 drugs like Ozempic could impact many categories, simply from a volume of consumption perspective. Worldpanel reports households with GLP-1 users are cutting grocery spend, while NNB says over 40% of consumers have considered these drugs.

## A New Challenge with GLP-1 Drugs Designed to Reduce Consumption

GLP-1 drugs, such as Ozempic, Wegovy, and Mounjaro, are medications that mimic the gut hormone GLP-1 to regulate blood sugar, slow digestion, and suppress appetite.

Originally developed to treat type 2 diabetes, they are now widely used for weight loss, leading to significant reductions in calorie intake.

**66%** of users claim to be taking GLP-1 drugs for Weight loss

**64%** of users claim they're snacking less because of the medication

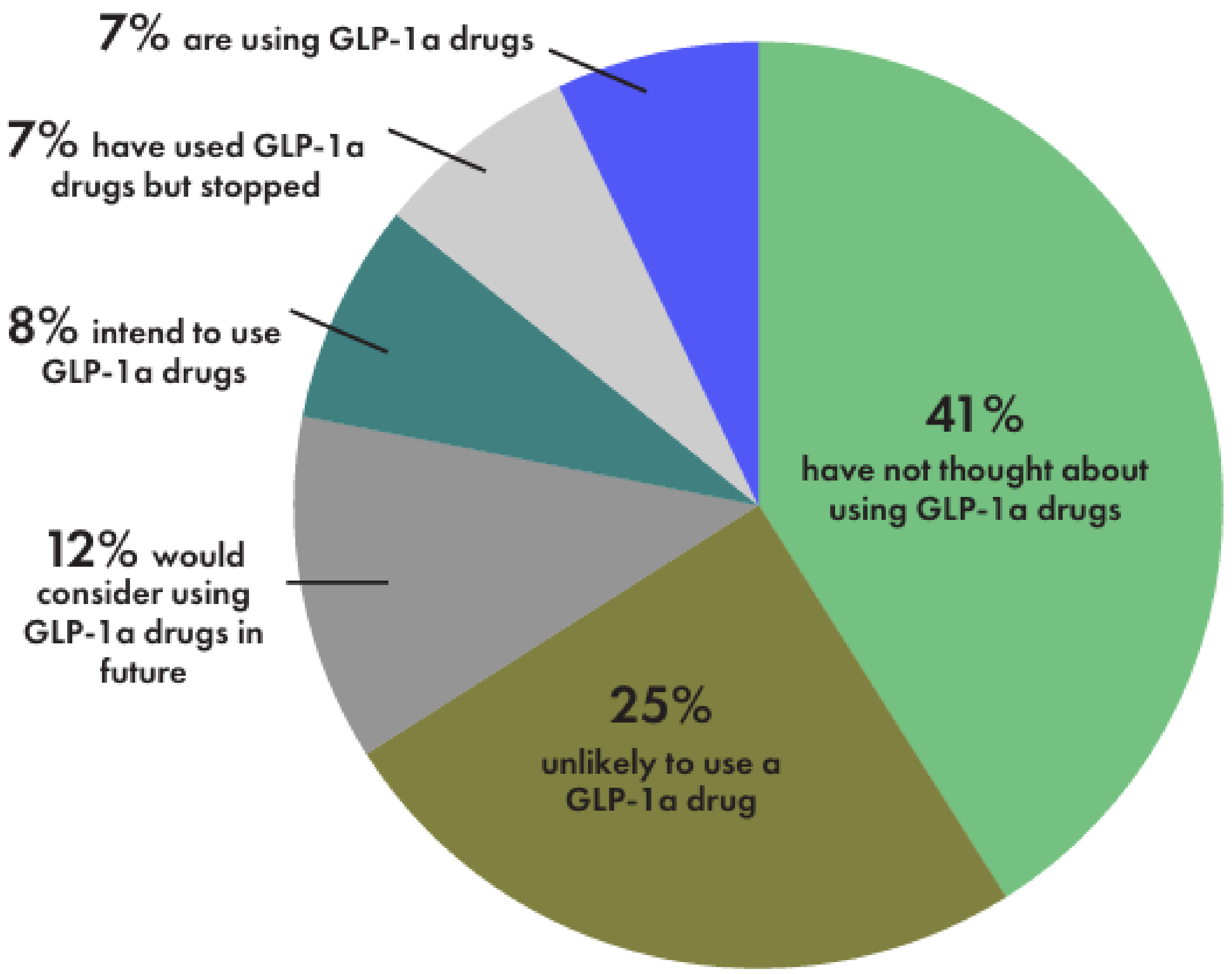
**63%** of users claim they were scaling back on indulgent treats

**2.3% -> 4.1%**

Share of UK Households with at least one GLP-1 user

GLP-1 Households saw an average **5.5%** reduction in monthly grocery spend.

**Chart 1: Consumer attitudes to GLP-1a drugs**



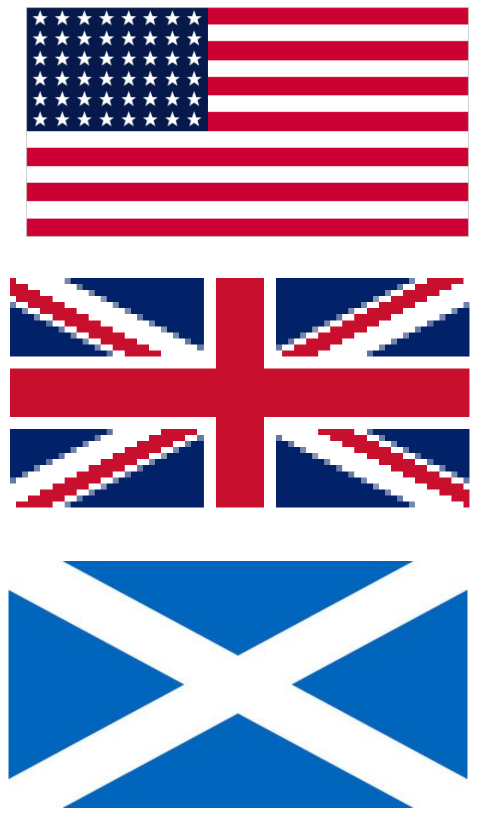

*Source: NNB five country consumer survey*

 Source: Worldpanel, 2025 / The Grocer, 2025 / NNB July 2025 Newsletter

THE KNOWLEDGE BANK
Turning insight into action

# In Scotland, 51% of Scots have been trying to lose weight in the last 12 months ; while 86% have heard of GLP-1 weight loss medications, only 13% claim an excellent understanding

**GLP-1 Usage**



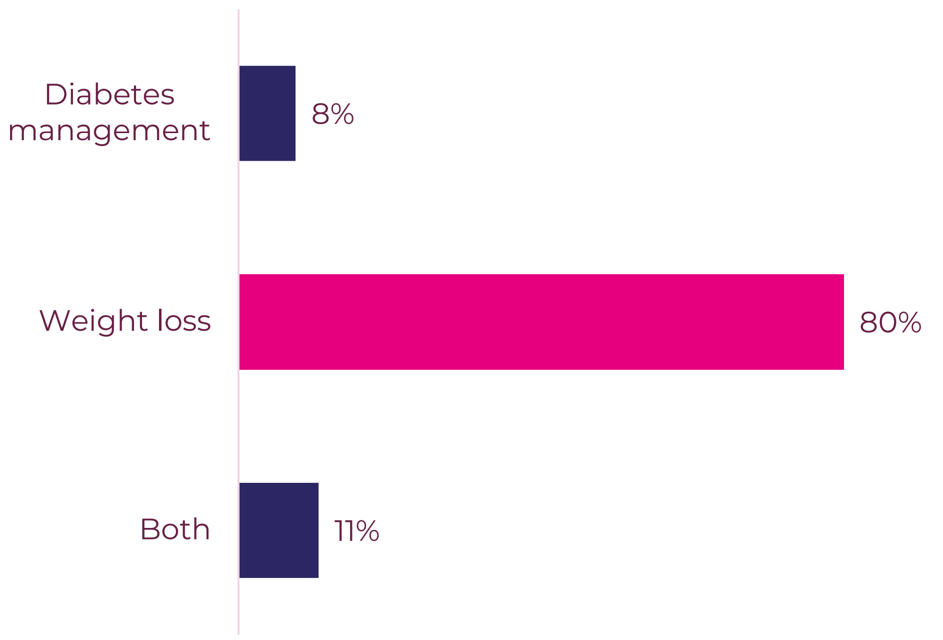
11.8%

4.3%

5%

5% have used them in the past
5% are thinking about using them

**For what purpose?**
**(Those with experience of them)**




For those currently using or who have used GLP-1 medication in the past, the primary reason for use is weight loss.

**How has taking the weight loss medication impacted how much you buy/spend on the following categories for yourself or your household?**

| More | Less |
|---|---|
| Vegetables | Cakes & biscuits |
| Strawberries/soft fruit | Sweets & chocolate |
| Chicken/other poultry | Prepared foods e.g. pies, ready meals |
| Eggs | Ice cream |
| Yoghurt | Snacks |

Retailers are responding with 'high protein' and 'nutrient dense' options

THE KNOWLEDGE BANK
Turning insight into action

MEAT & POULTRY CATEGORY REPORT

# Shopper Health persists as an area of importance, while almost 50% of shoppers claim they find the idea of nutrient dense meals appealing. Keeping this & GLP-1's in mind, Meat & Poultry products can be among some of the most nutrient dense foods available, so leveraging communications to educate shoppers in this area could help.

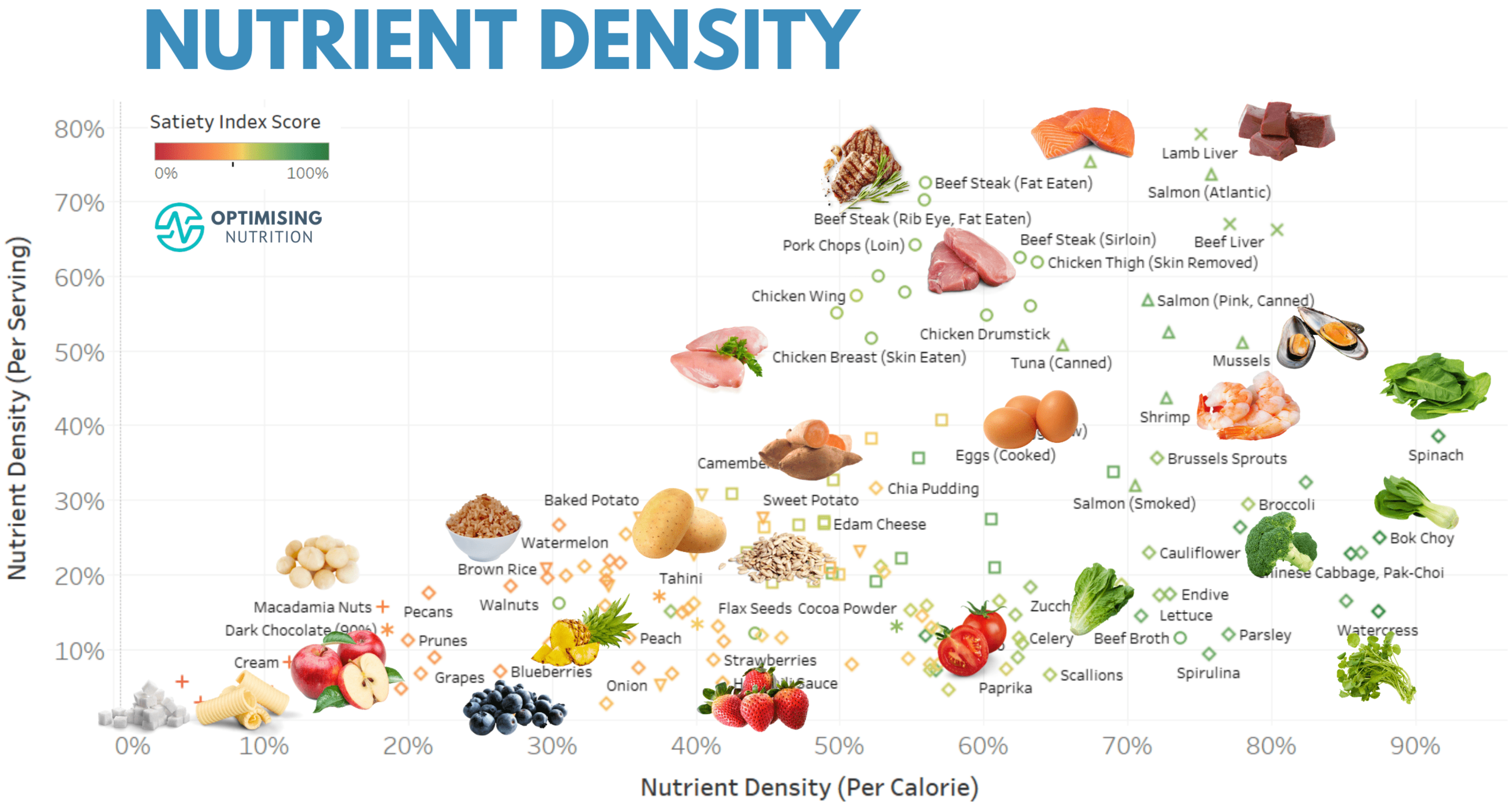
## Promo Mechanics within Meat & Poultry

**31%**

...of consumer claim not to have bought nutrient dense meals before but find them appealing.

**17%**

...of consumer claim nutrient dense meals appeal to them and have bought them before.

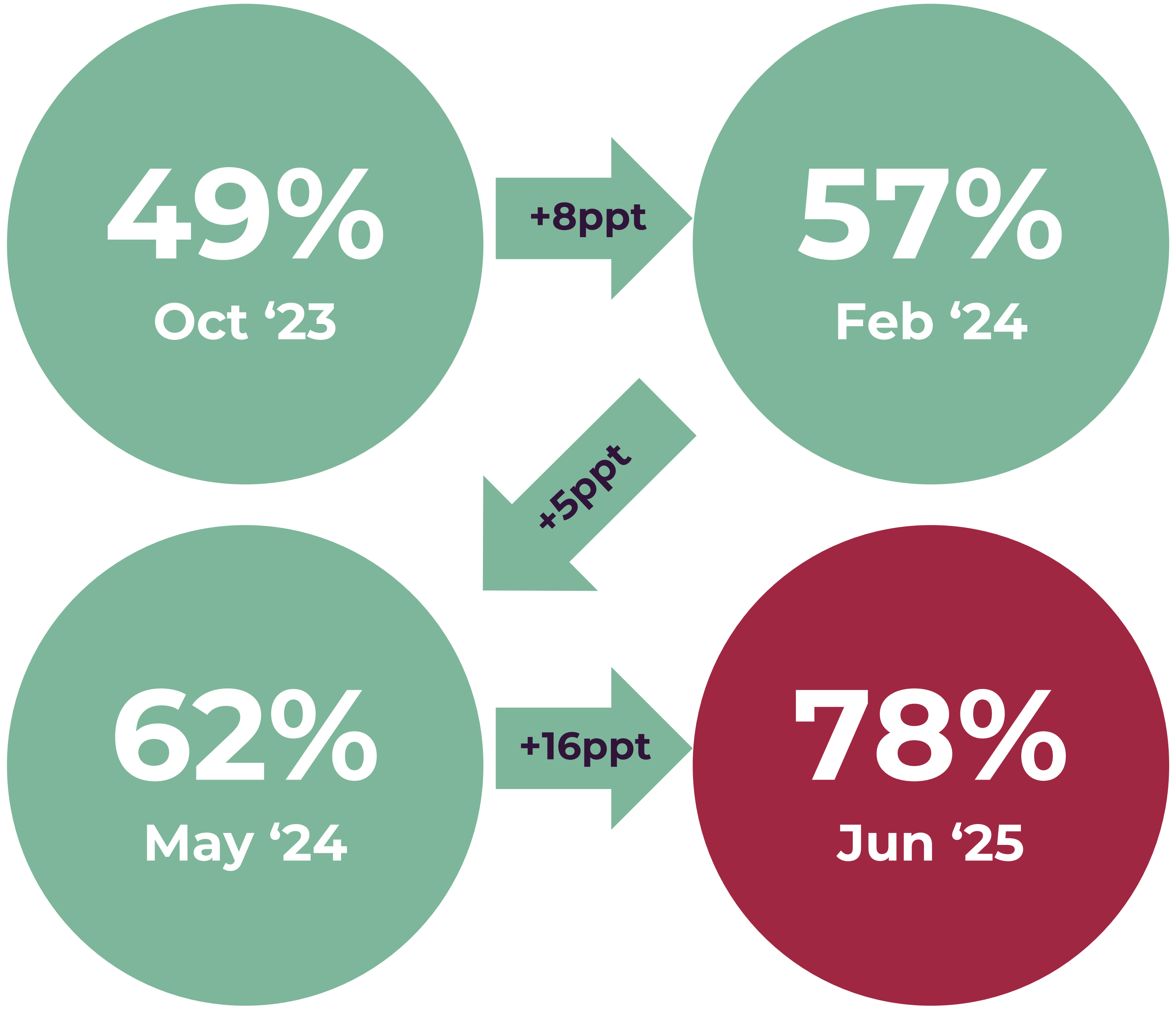



 Source: Levercliff Consumer Tracker, Version 20 / Optimised Nutrition Press Release, 2023

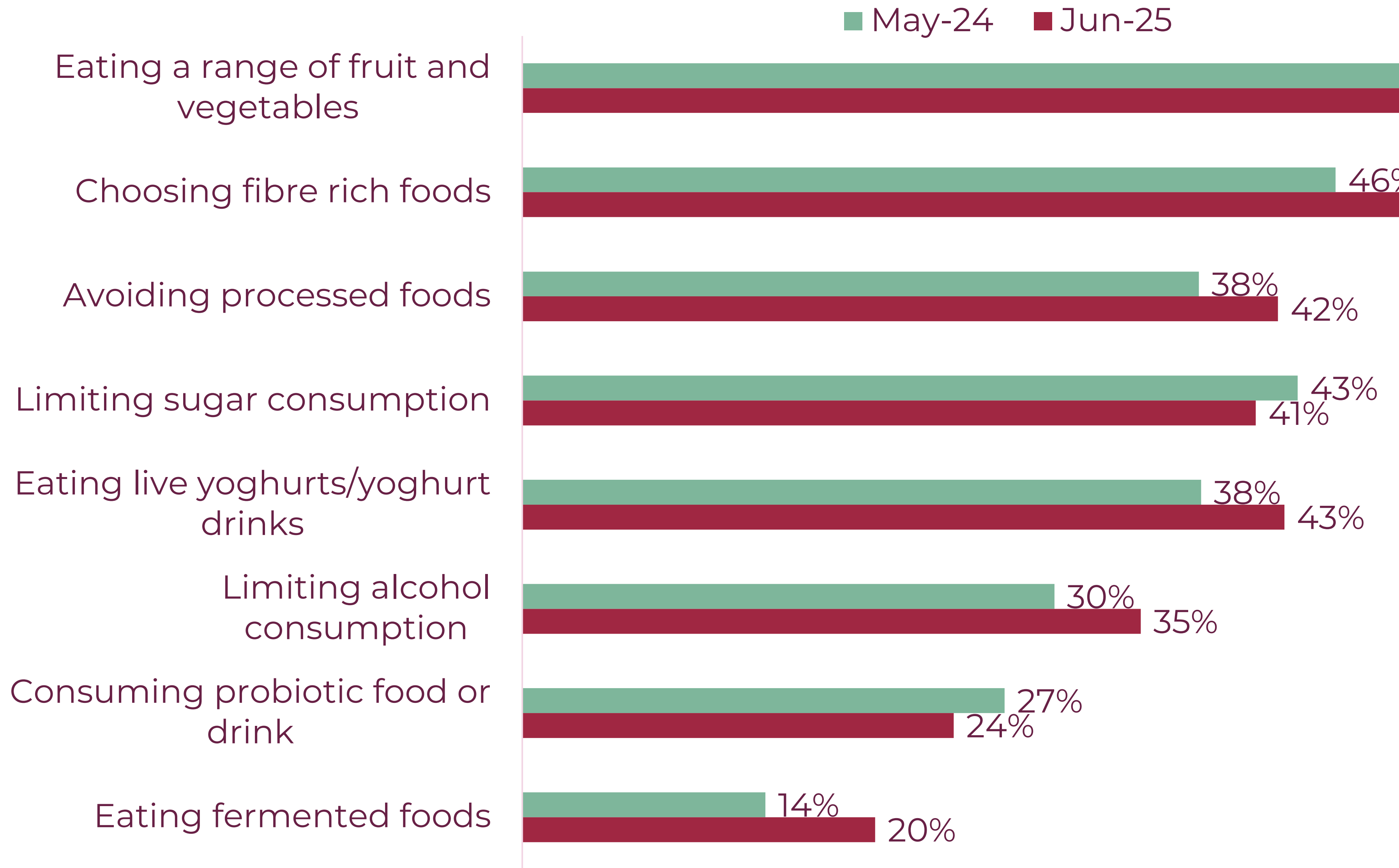
This becomes even more important when factoring in the growing awareness of both UPF's and Gut Health. For areas of the sector like Bacon, some shoppers make a UPF connection. Ensuring the nutritional information is communicated, while focusing on product reformulation to address these concerns can help grow the category.

## UPF Awareness Risin, Gut Health, and their Category Effect

### UPF Awareness Timeline




### Methods used to Support Gut Health





 Source: Levercliff Tracker Survey, Edition 17, June 2025

# From an NPD perspective, producers are focusing on adding value, where high-tier premiumisation in own-label, licensed brand partnerships, and appliance-specific product design are collectively working to move the category forward and enhance choice for shoppers.

## The Latest in the World of innovation & NPD



Finnebrogue has launched **Guinness-infused bacon and sausages** (£3.75), combining the iconic stout's flavor with its signature **nitrite-free** production, immediately addressing that UPF concern.

This innovation uses high-profile licensing to elevate everyday staples into "gourmet" experiences, signaling a category shift toward **cross-brand partnerships**. By merging health-conscious "clean labels" with premium flavors, it sets a template for driving value in traditional meat sectors through unique collaborations.

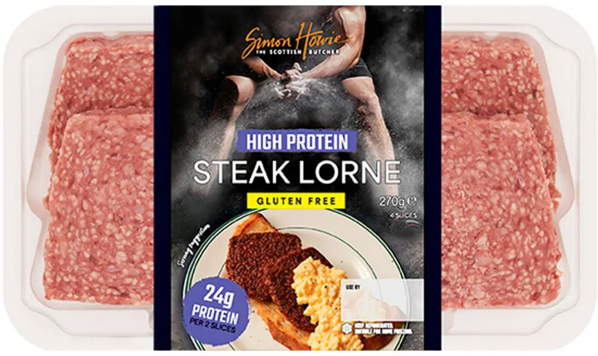
**Morrisons**' new "**Best Signature Collection**" elevates the fresh meat category by introducing ultra-premium, restaurant-quality cuts and gourmet seasonings with a "farm shop" aesthetic.

This innovation shifts the category from basic commodities toward **high-margin premiumisation**, signaling a future where supermarkets directly challenge high-street butchers through speciality quality and convenience.



Forresters' new **'Crisp Up'** range (£4) at Morrisons features chicken specifically engineered to deliver a "fakeaway" crunch in air fryers in under 10 minutes.

This launch shifts the chilled category toward **appliance-first innovation**, signaling a future where products are designed for specific kitchen tech rather than universal oven cooking.




**Simon Howie** are offering a **modern take** on the **classic Scottish square sausage,** the new Steak Lorne combines a rich, meaty flavour with a performance driven **protein boost.**

Made with 70% beef and delivers 24g of protein per serving (two slices) to cover a post-workout recovery meal or as a hearty breakfast.

Additionally, the launch is also **gluten-free**


Source: The Grocer, 2025 (Articles Referenced in Bibliography)

MEAT & POULTRY CATEGORY REPORT

# Supermarkets are embracing "meaty not greedy" value, using "frugal chic" techniques like slow-cooking and rendering fats to turn budget cuts into high-flavour, protein-rich meals. By pairing bold pantry flavours with accessible "treat meats," they are providing affordable satiety that fits current budget realities.

## The Food People’s Meat & Poultry Evaluation

### SHOPPER & MARKET: KEY INSIGHTS

**When two become one** – it isn’t enough anymore to advertise a tasty sausage or burger and expect customers to come running. With funds stretched paper thin and food choice noise coming from all parts of the internet, consumers need a good reason to part with their hard-earned money. Meal-inspired mix-ins or twists straddle the line of new and familiar, giving consumers lots of bang for their buck.

**Fat-forward** – used for its flavour and cost-saving purposes, animal fats are being rendered and reserved then used in a variety of ways E.g. mixing and matching animals (for example, chicken fat with fish), brushing over veg for extra flavour with little extra cost, adding umami/kokumi to dessert dishes.

**Tastes like chicken** – the humble chicken is being elevated as chefs and producers turn to the popular bird, driven by costs and consumer cravings. Its familiarity makes it a ‘safe’ menu addition; one that can be taken in a variety of flavour and format led directions.

### MEAT & POULTRY: NEW & EVOLVING TRENDS

**Frugal is the new chic.** In this economy, it really is about making meat and poultry affordable, without sacrificing taste or flavour. That boils down to **rendering fats**, **bones and marrow** and **using every inch of the animal for flavour**, without hesitation or apology. Low and slow techniques are applied to cheaper, tougher cuts to make them tender and luxe-tasting whilst an overarching approach to simplicity makes dining out a bit more affordable for both producer and consumer.

**Indulgence** is still on the menu, added through **sauces, sides and condiment layering** rather than premium meats, to add flavour without adding prohibitive cost.

The meat aisle is adapting to a "meaty not greedy" mindset, where shoppers are looking to satisfy a protein-rich "carnivorous itch" without overspending. This has led to the rise of "frugal chic," a trend where consumers and producers alike embrace traditional, cost-effective techniques like low-and-slow cooking for tougher cuts and using every part of the animal, including fats, bones, and marrow, to maximize flavor without adding prohibitive costs.

This shift toward "bold acidity and balance" using global pantry staples like pickles and spice rubs allows for a gourmet experience on a budget. By elevating the "humble chicken" and exploring "treat meats" like duck in more accessible, ready-meal formats, the category is finding new ways to deliver indulgence and "fat-led satiety" while remaining firmly grounded in the realities of the ongoing cost-of-living crisis.

 Source: The Food People, ‘Meat & Poultry Snapshot’, 2025

MEAT & POULTRY CATEGORY REPORT

# Market Summary
(Topline)

**The Meat & Poultry market** is growing in value and has reached a valuation of £15.8bn. That said, volume has declined, so the category is becoming notably more expensive.

**Scotland accounts for 9.3% of the total market**. Growth in Scotland is largely similar, as the market is quickly closing in on a £1.5bn valuation.

**Fresh Meat, the largest segment, grows its share slightly**, helped by sectors such as Beef which has seen the most notable level of inflation across all meat types. Cooked Meat & Rotisserie have struggled, growing below market rate, while T&P Meats has performed well in terms of volume growth.

Within all Meat categories, **Brand's share of the market is notably higher in Scotland** than at GB level. Only in Poultry categories are shares more aligned.

**Beef has soared above other meat types from an inflationary perspective,** driven by falling cattle numbers and increasing animal feed costs. The level of inflation surpassed its previous 21st century high during the global financial crisis of 2008/2009.

Despite record inflation, **consumer positivity towards British agriculture reached a record 71% in 2025.**

**Scots have a strong affinity toward Scottish produce** - 5 in every 6 shoppers claim they would like to buy food produced in Scotland, and many claim they would pay a premium for multiple meat types if it were Scottish, though retailers are currently divided.

**Producers and retailers are developing meat and poultry ranges** in stores by adding value at both ends of the spectrum. They offer better quality and choice for those who can trade up but also promote the use of cheaper cuts with recipes and/or cooking methods.

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

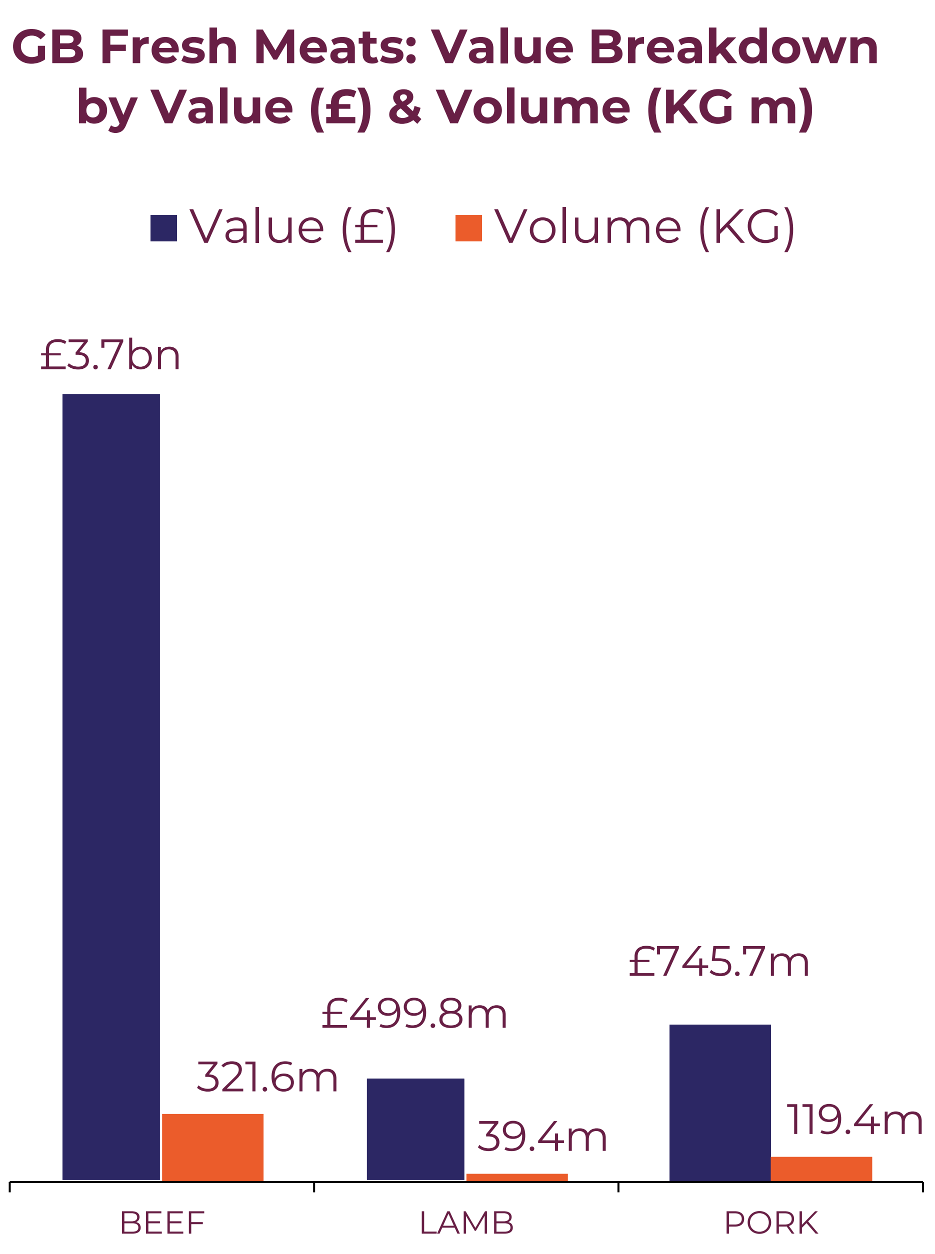
# Fresh Meat

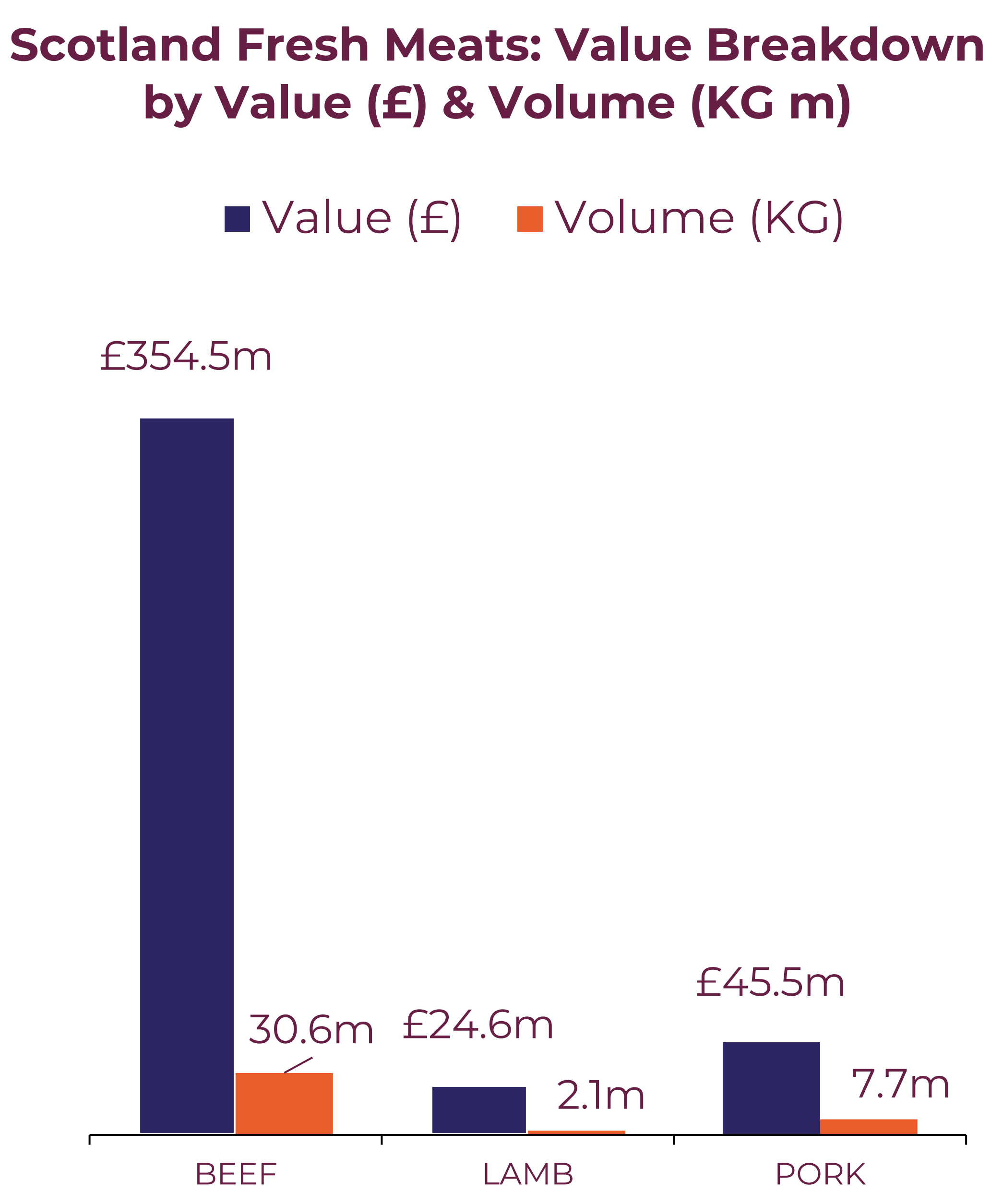
MEAT & POULTRY CATEGORY REPORT

Of the leading Fresh Meat categories, there is minimal difference in performance across both GB & Scotland.

The core differences lie in share. At GB level, Lamb is around 7.5x smaller than Beef, but this increases to around 14x in Scotland.

Similarly with Pork, it is about 20% the size of Beef at GB level, but about 13% the size of Beef in Scotland, suggesting there is opportunity to grow sales.




| GB Change vs YA (%) | Beef | Lamb | Pork |
|---|---|---|---|
| Value | +17.0% | +4.6% | +4.5% |
| Volume | -5.0% | -5.0% | +2.2% |

| Scotland Change vs YA (%) | Beef | Lamb | Pork |
|---|---|---|---|
| Value | +16.2% | +3.7% | +4.0% |
| Volume | -5.5% | -7.6% | +2.0% |

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

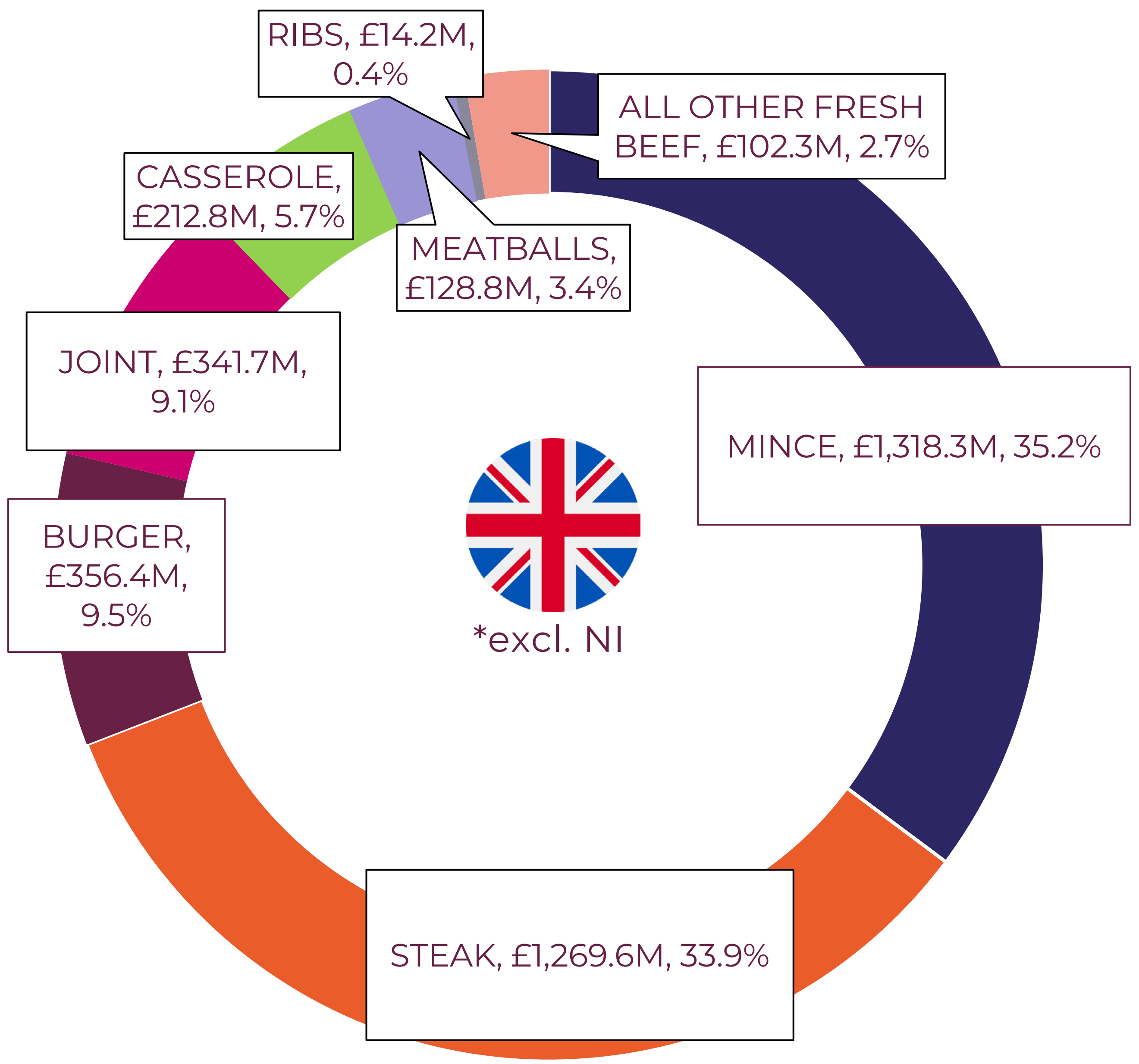
# Beef

Beef sales reached a £3.74bn valuation by the beginning of 2026, heavily driven by supply chain pressures as value was up 14% while volumes entered a decline YoY.

Mince was the primary driver, growing by almost a quarter in value sales YoY, surpassing Steak as the largest Beef sub-category in retail, but both entered a volume decline.

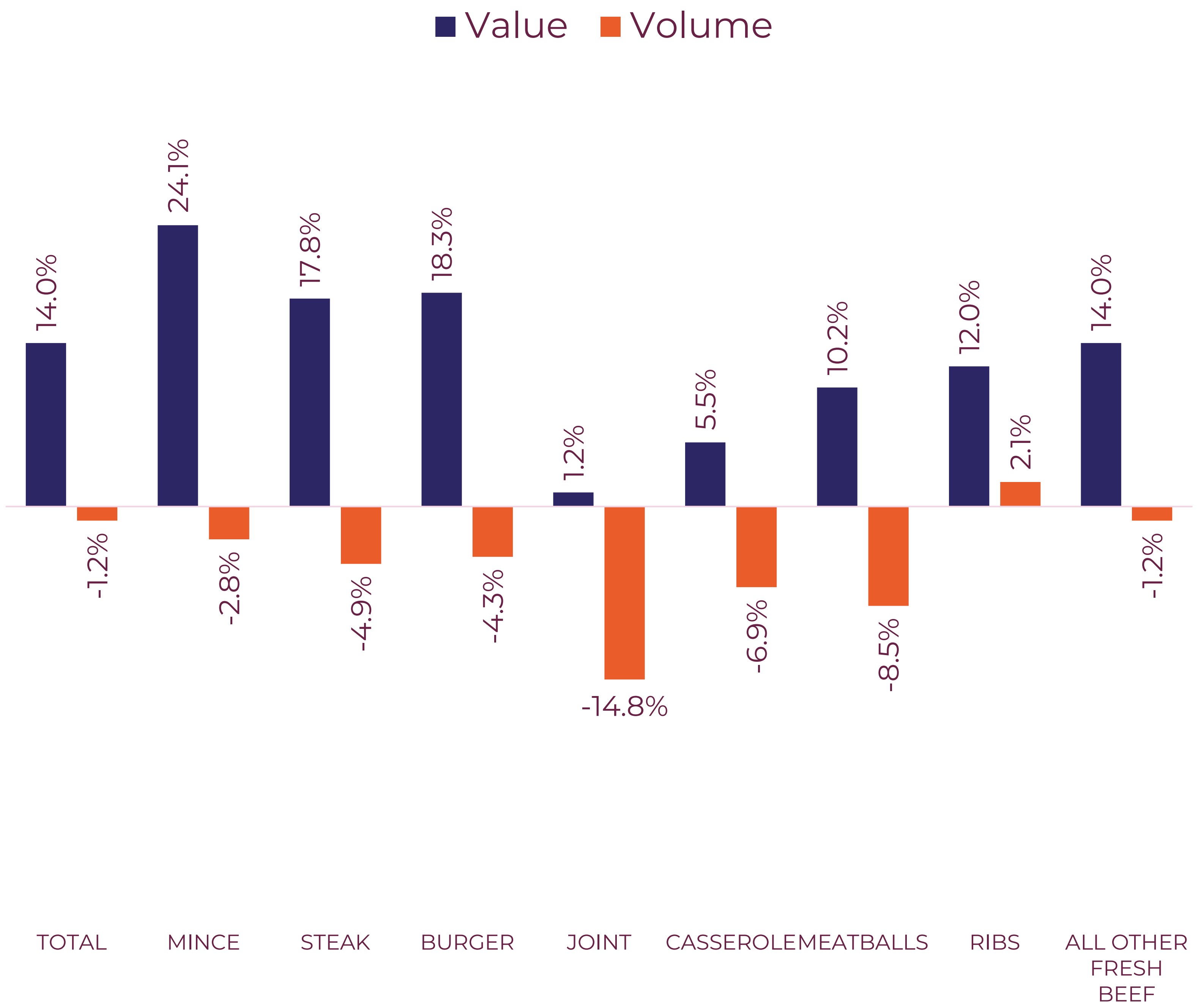
Joint was hit the hardest across sub-categories while only Ribs saw volume growth.

**Total GB Beef Market Value Breakdown by Sub-category (£m)***




**Total Market Value: £3.74bn**

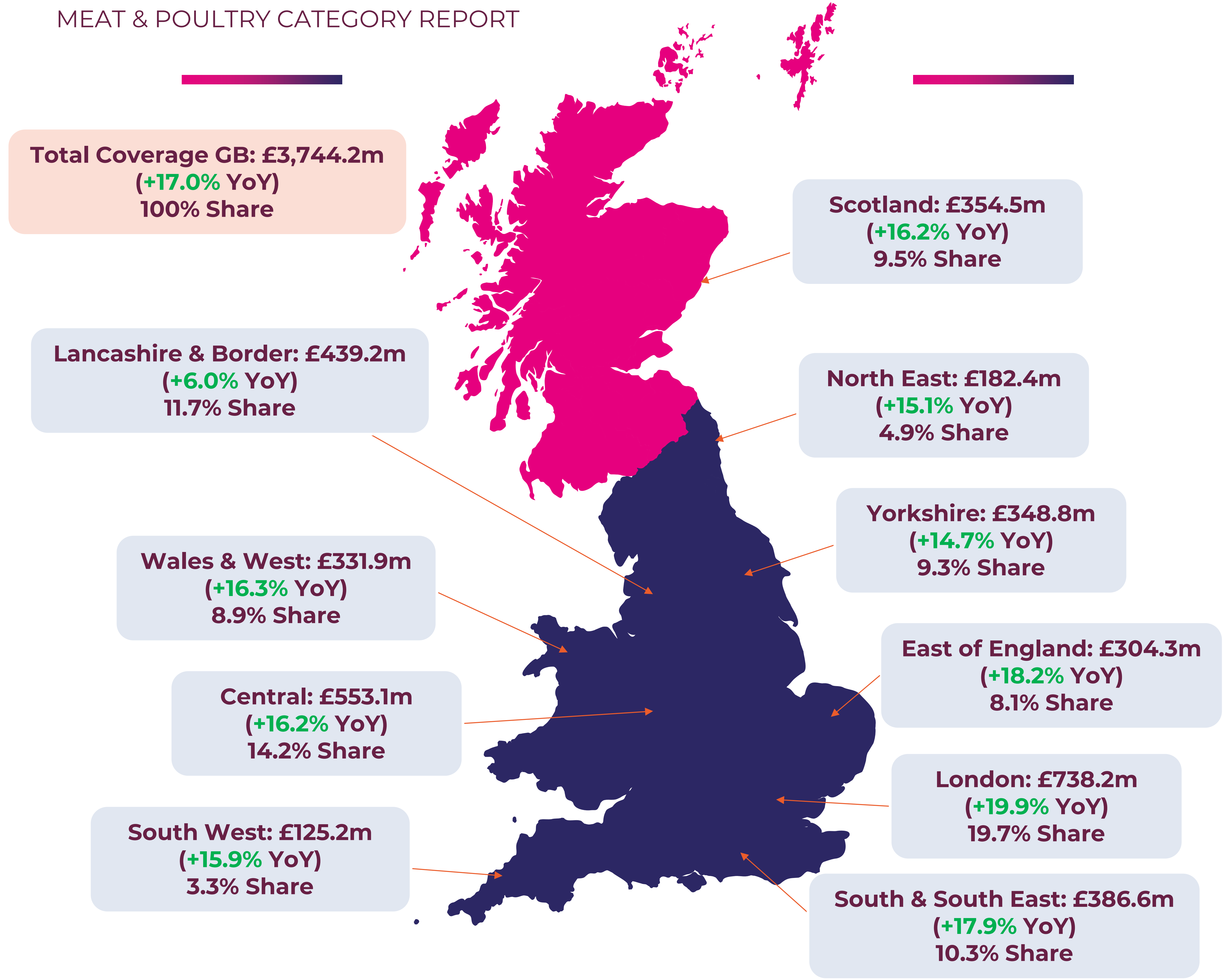
**Total GB Beef Year-on-Year Change (%) by Value (£), Volume (KG)**




 Source: Nielsen Total Coverage GB – 52 Wks - w/e 24 January 2026

MEAT & POULTRY CATEGORY REPORT

## Total Beef Market Value Breakdown by Region (£m)




THE KNOWLEDGE BANK
Turning insight into action

Scotland holds a 9.5% share of the Beef market, slightly overtrading vs its fair share of the Fresh Meat category (9.2%), equal to roughly £10.3m. It has experienced strong growth, slightly below that of the market, but above many Northern English regions.

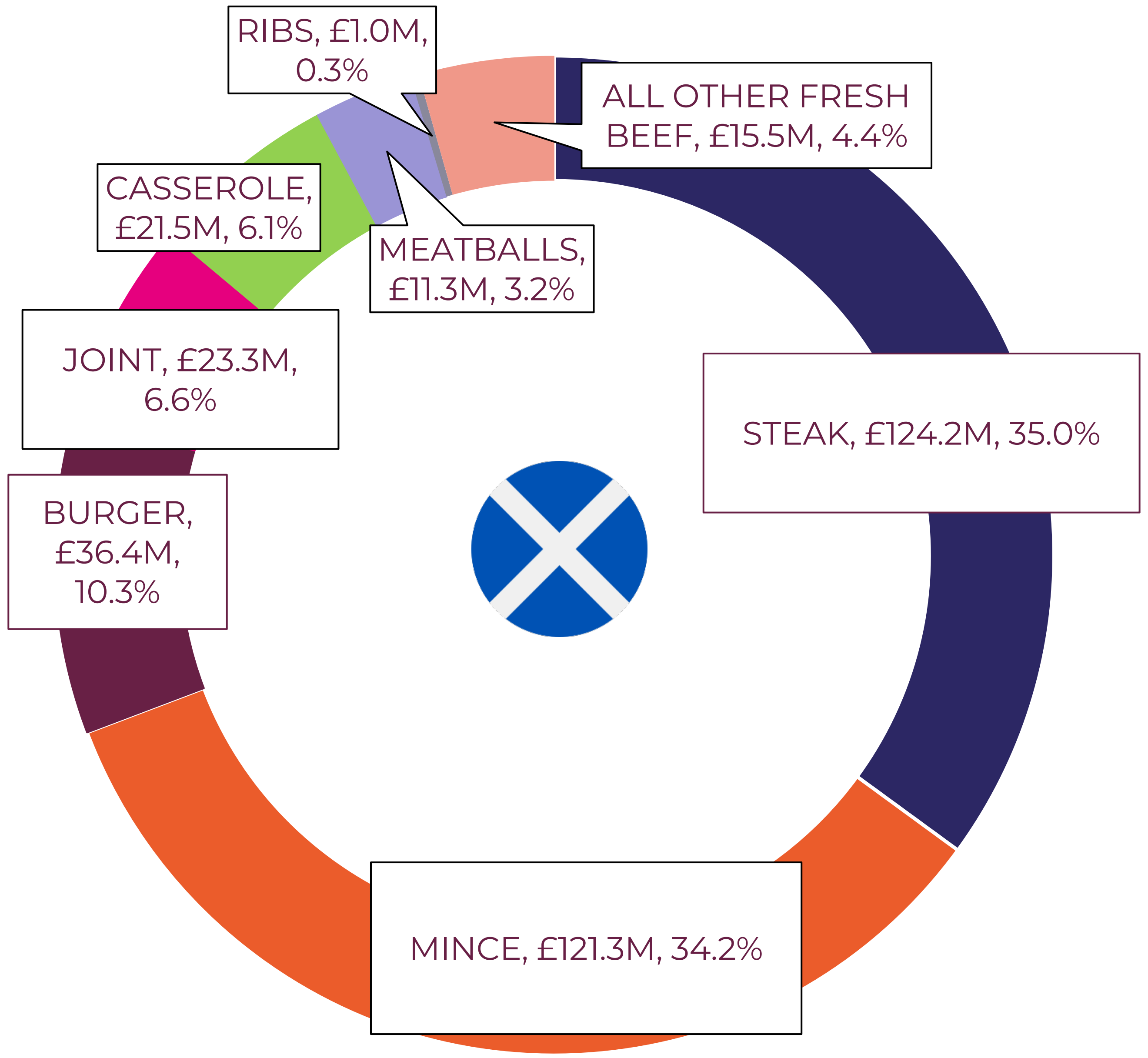
London, the East & England and the South & South East continue to grow ahead of the market, suggesting more affluent areas were less impacted by price increases.

Source: Nielsen Total Coverage GB – 52w/e 24 January 2026

In Scotland, beef grew by roughly £50m YoY to reach a £354.5m valuation, again driven similarly by sub-categories that drove total GB performance. Steak continues to hold the largest share in Scotland, but Mince is closing in quickly.

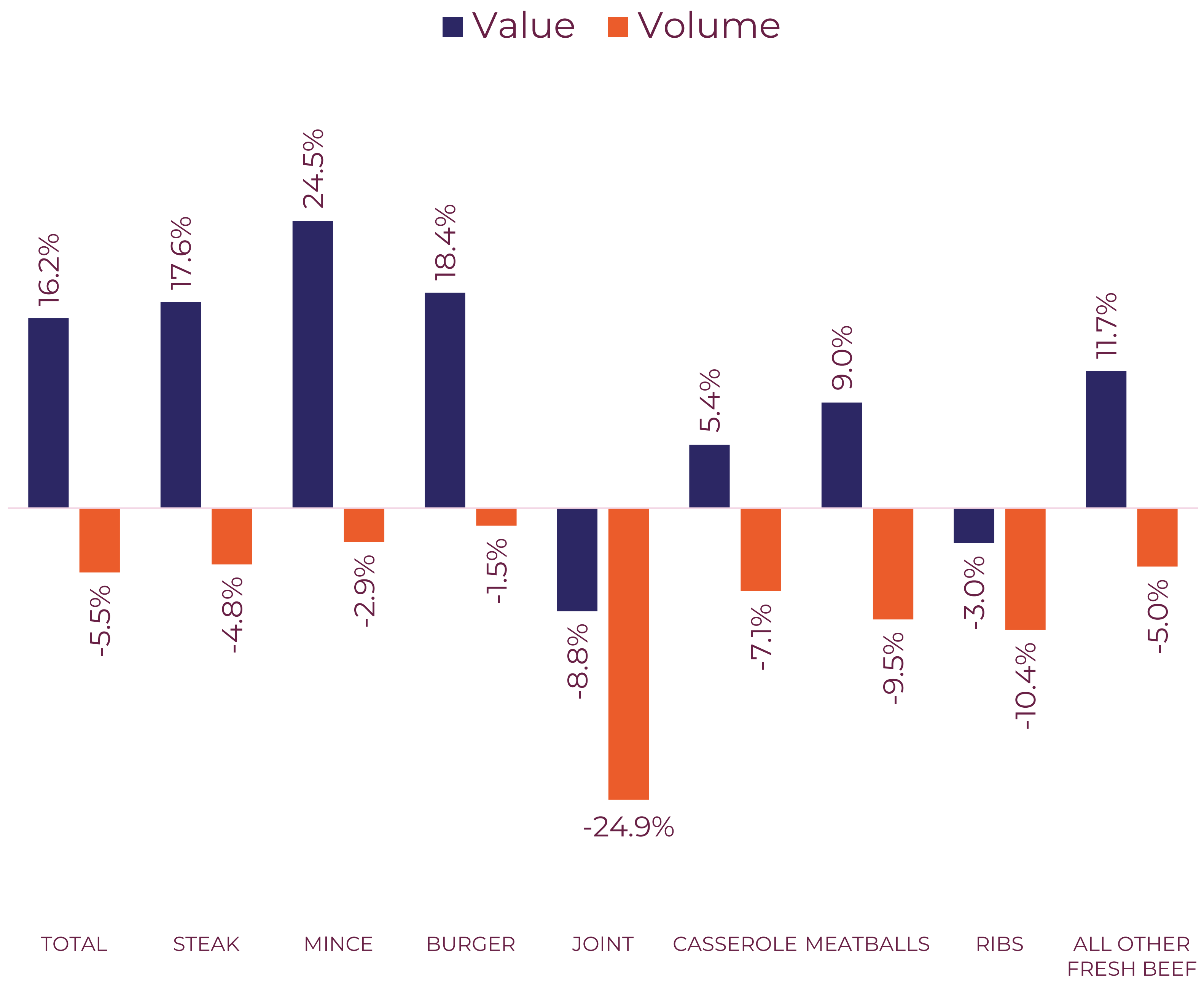
Scotland's largest issue is that volume has fallen significantly more than at GB level and hasn't really been recovered across other Meat & Poultry categories, suggesting a greater level of price sensitivity.

## Total Scotland Beef Market Value Breakdown by Sub-category (£m)*




**Total Market Value: £354.5m**

## Total Scotland Beef Year-on-Year Change (%) by Value (£), Volume (KG)






Source: Nielsen Total Coverage Scotland – 52 Wks - w/e 24 January 2026

**NOTE:** Figures represent Grocery Multiples channel (not Total Coverage – see source) as it is the only channel where the Promotion Effect measure can be calculated. As such, value sales figures differ slightly

THE KNOWLEDGE BANK

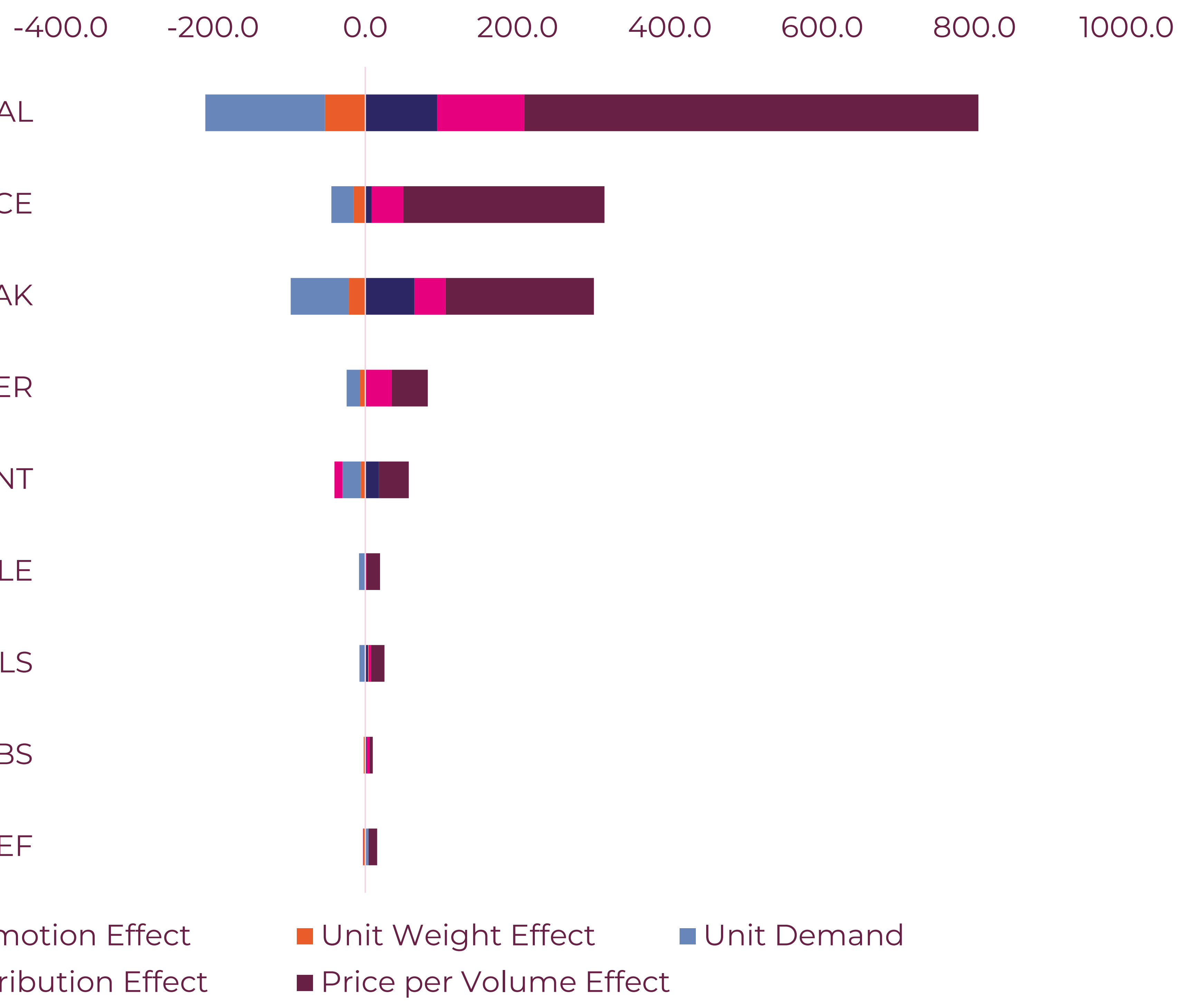
Volume Pricing drove almost £600m of value growth for the Beef category YoY, which caused a fall in demand equal to roughly £160m.

Drivers have been largely consistent across the Beef sub-categories, though more expensive cuts have suffered most, e.g. Steak.

In the more popular sectors such as steak and mince, consumers have moved to smaller pack sizes to manage spend.

## Total Beef Market Breakdown by Value Drivers (£m)

| | £m | Change (£m) vs YA |
|---|---|---|
| TOTAL | £3,717.8 | +543.2 |
| MINCE | £1,308.6 | +270.0 |
| STEAK | £1,262.2 | +202.0 |
| BURGER | £350.3 | +57.7 |
| JOINT | £341.5 | +16.7 |
| CASSEROLE | £212.0 | +11.2 |
| MEATBALLS | £127.7 | +17.6 |
| RIBS | £14.2 | +7.8 |
| ALL OTHER BEEF | £101.3 | +12.5 |



MEAT & POULTRY CATEGORY REPORT

Scotland's average KG pricing continues to operate at roughly 1% lower than GB, but the gap continues to narrow as volume pricing in Scotland increased slightly more so than in GB.

Mince saw pricing increase by almost 30%, which given its larger shopper base, will have been felt a lot more by the average consumer.

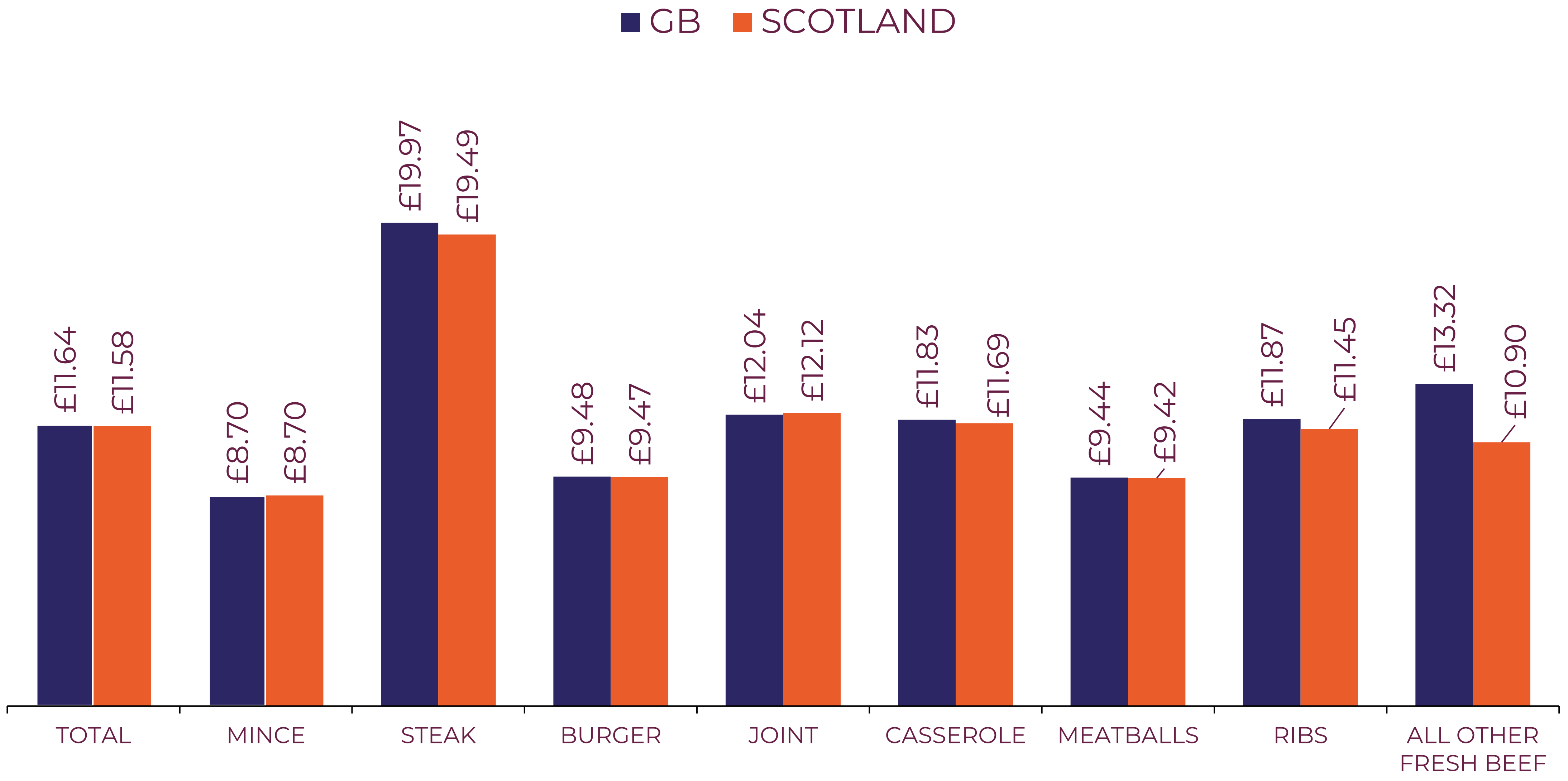
Only Ribs saw an average KG increase of less than 10%, showing the extent of supply chain struggles hitting the category.

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026



THE KNOWLEDGE BANK

**Total Beef: Value Breakdown by Top Price per Kilogram (£)**




| | TOTAL | MINCE | STEAK | BURGER | JOINT | CASSEROLE | MEATBALLS | RIBS | ALL OTHER FRESH BEEF |
|---|---|---|---|---|---|---|---|---|---|
| **GB Change vs YA (%)** | +15.4% | +27.7% | +23.8% | +23.6% | +18.8% | +13.4% | +20.5% | +9.8% | +15.4% |
| **Scotland Change vs YA (%)** | +17.6% | +28.2% | +23.6% | +20.2% | +21.4% | +13.5% | +20.4% | +8.3% | +17.6% |

MEAT & POULTRY CATEGORY REPORT

THE KNOWLEDGE BANK
Turning insight into action

## Total Beef Promotional Activity: GB*

**Key**

**Promo Sales (%)**
Promo Sales (£)
(YoY £ growth)

**Total**
*excl. NI

**19.4%**
£720.2m
(+9.8% YoY)

| | Promo Sales (%) | Promo Sales (£) | YoY £ growth |
|---|---|---|---|
| Mince | 8.3% | £108.6m | (+5.2% YoY) |
| Steak | 20.7% | £261.5m | (+28.7% YoY) |
| Burger | 27.1% | £95.1m | (-1.2% YoY) |
| Joint | 44.5% | £151.9m | (+1.0% YoY) |
| Casserole | 23.3% | £49.3m | (-1.5% YoY) |
| Meatballs | 22.9% | £29.2m | (+2.9% YoY) |
| Ribs | 35.9% | £5.1m | (+5.1% YoY) |
| All Other Fresh Beef | 19.2% | £19.5m | (+0.2% YoY) |

Beef promo sales grew by roughly £65m YoY (+9.8%), suggesting retailers have tried to address rising prices, but activity has been scattered across categories.

For example, Mince at the cheaper end of the category saw an increase of 5.2% in promo sales, but overall promo sales only accounted for 1/12 of total sales. Steak, the most expensive Beef category, increased activity significantly in attempt to maintain its shoppers base, while Burgers saw activity reduce.

Source: Nielsen Total Grocery Multiples GB – 52 w/e 24 January 2026

THE KNOWLEDGE BANK

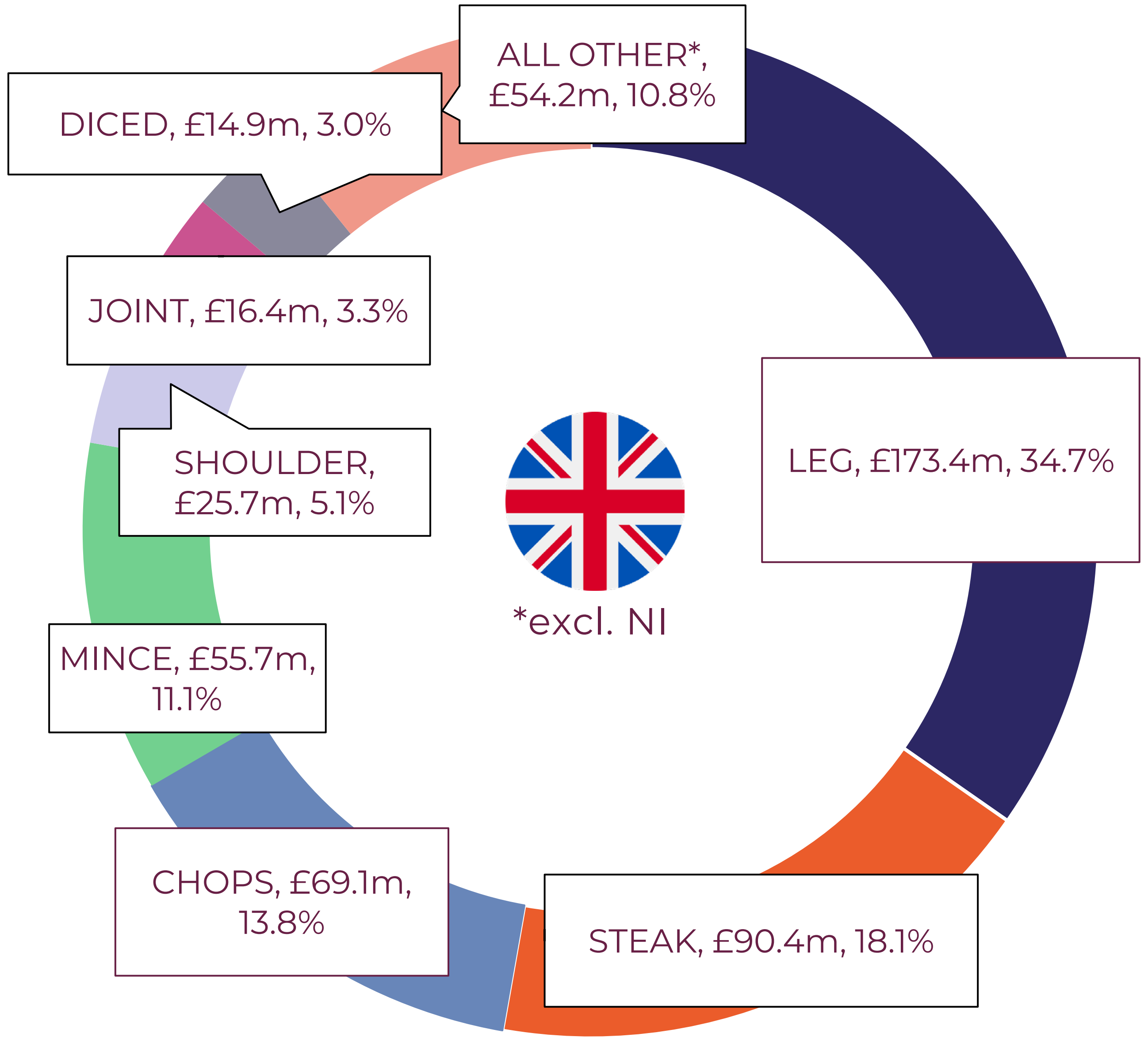
Delivered by
**Scotland Food & Drink Partnership**

# Lamb

Lamb sales have essentially reached the half a billion pounds valuation in GB retail, again suffering heavily from volume price increases. Lamb already one of the most expensive proteins has underperformed vs the Fresh Meat category.

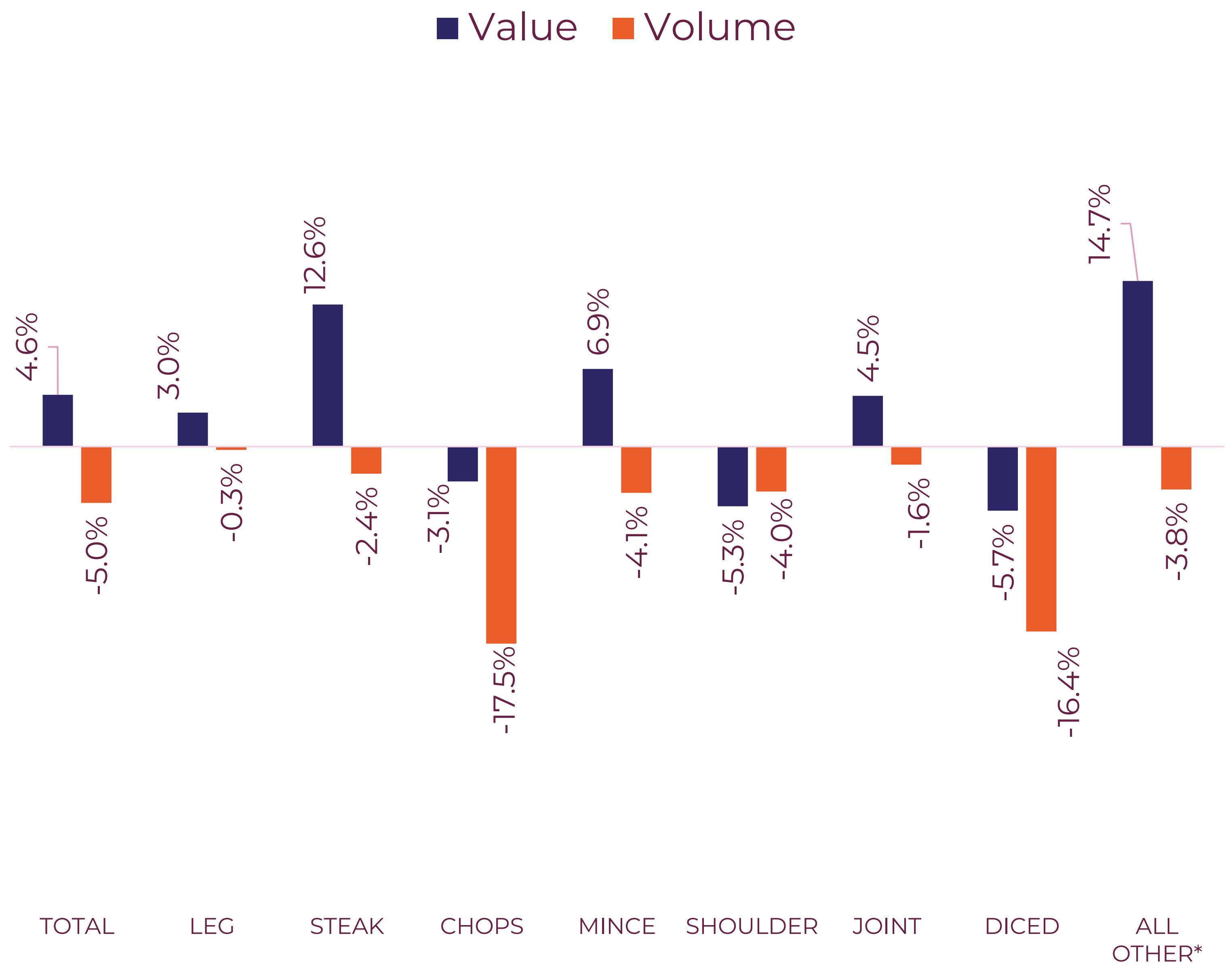
Sub-categories like Steak have provided an element of resilience, growing around 12% in value and seeing lower volume decline, but the overall trajectory of the category remains routed in volume struggles.

**Total GB Lamb Market Value Breakdown by Sub-category (£m)***




**Total Market Value: £499.8m**

**Total GB Lamb Year-on-Year Change (%) by Value (£), Volume (KG)**



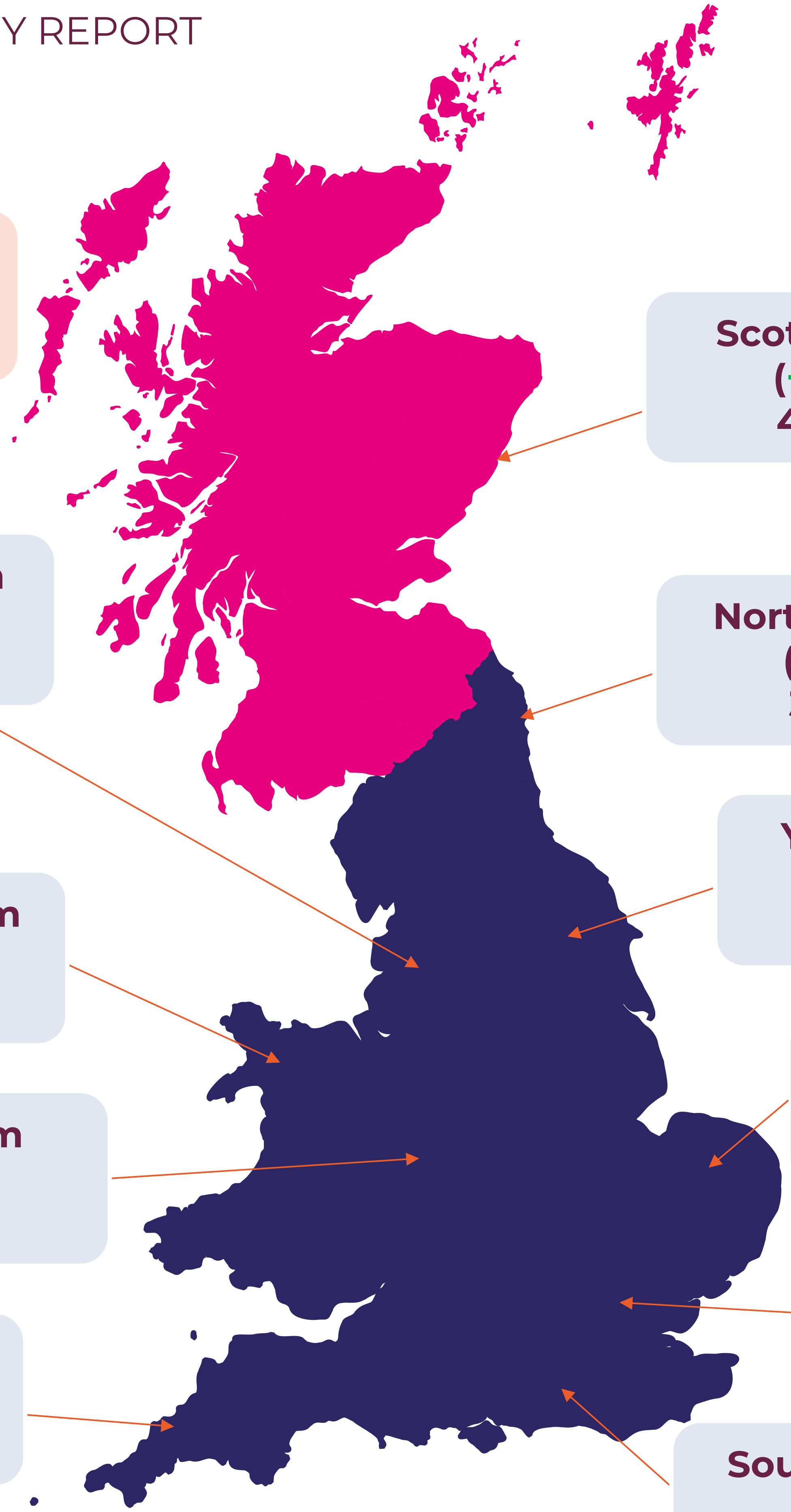



Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026 *Includes Fillet Burger, Shank, Meatballs & Offal

MEAT & POULTRY CATEGORY REPORT

THE KNOWLEDGE BANK
Turning insight into action

## Total Lamb Market Value Breakdown by Region (£m)




Lamb continues to significantly undertrade in Scotland. When compared to its fair share of Fresh Meat (9.2%), this is equal to roughly £21.4m, suggesting there remains a £20m+ opportunity for Scottish lamb producers to reach its fair share.

Due to its expense, Lamb performs better in more affluent southern regions which account for relatively high share of lamb sales compared to Fresh Meat, while also continuing to see growth.

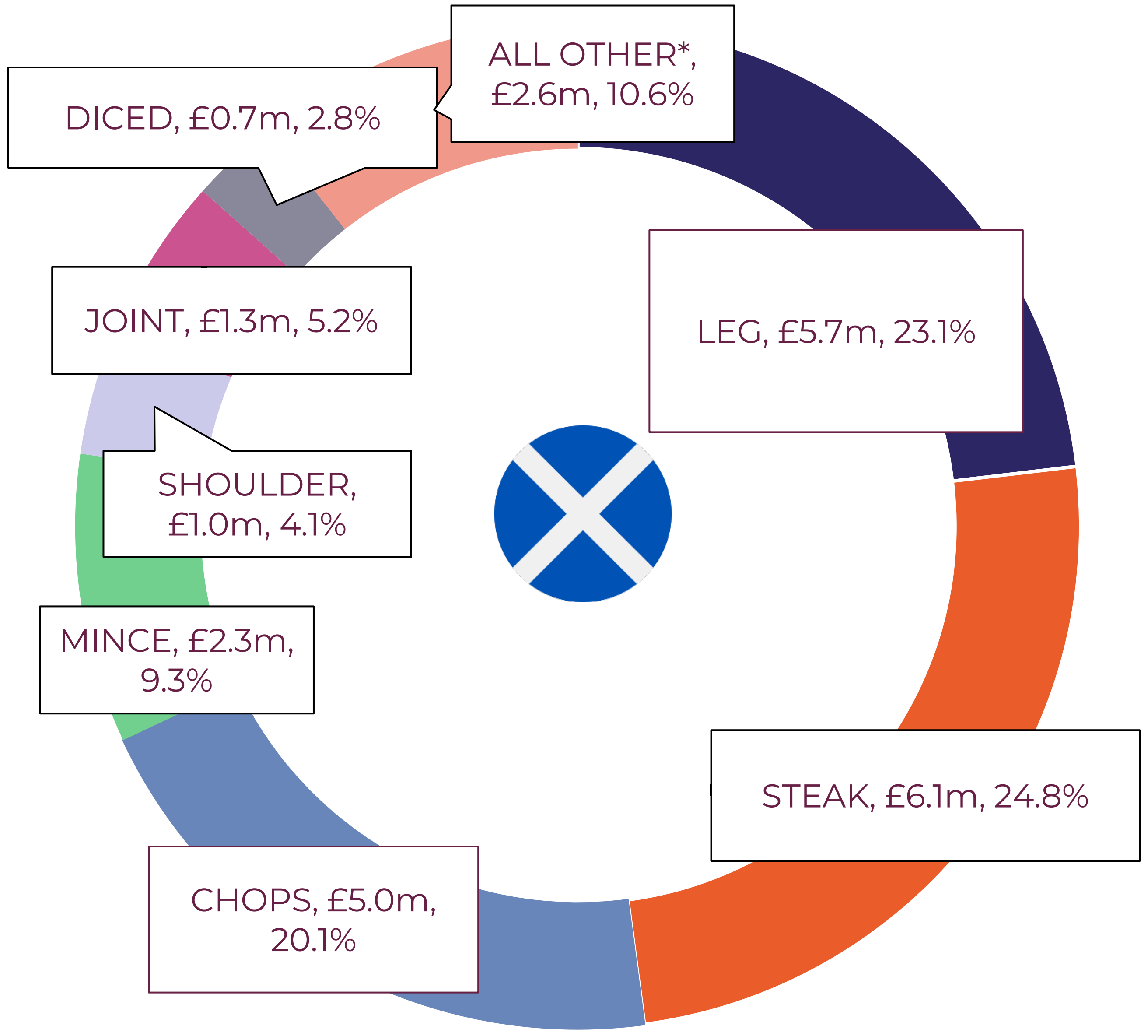
Source: Nielsen Total Coverage GB – 52w/e 24 January 2026

There is a disparity in value & volume performance between Lamb in Scotland and the wider GB market, similar to Beef, except within lamb it is more of an issue.

This is largely attributed to Steak, Chops & Mince, which have seen significant divergence in performance across the two key metrics.

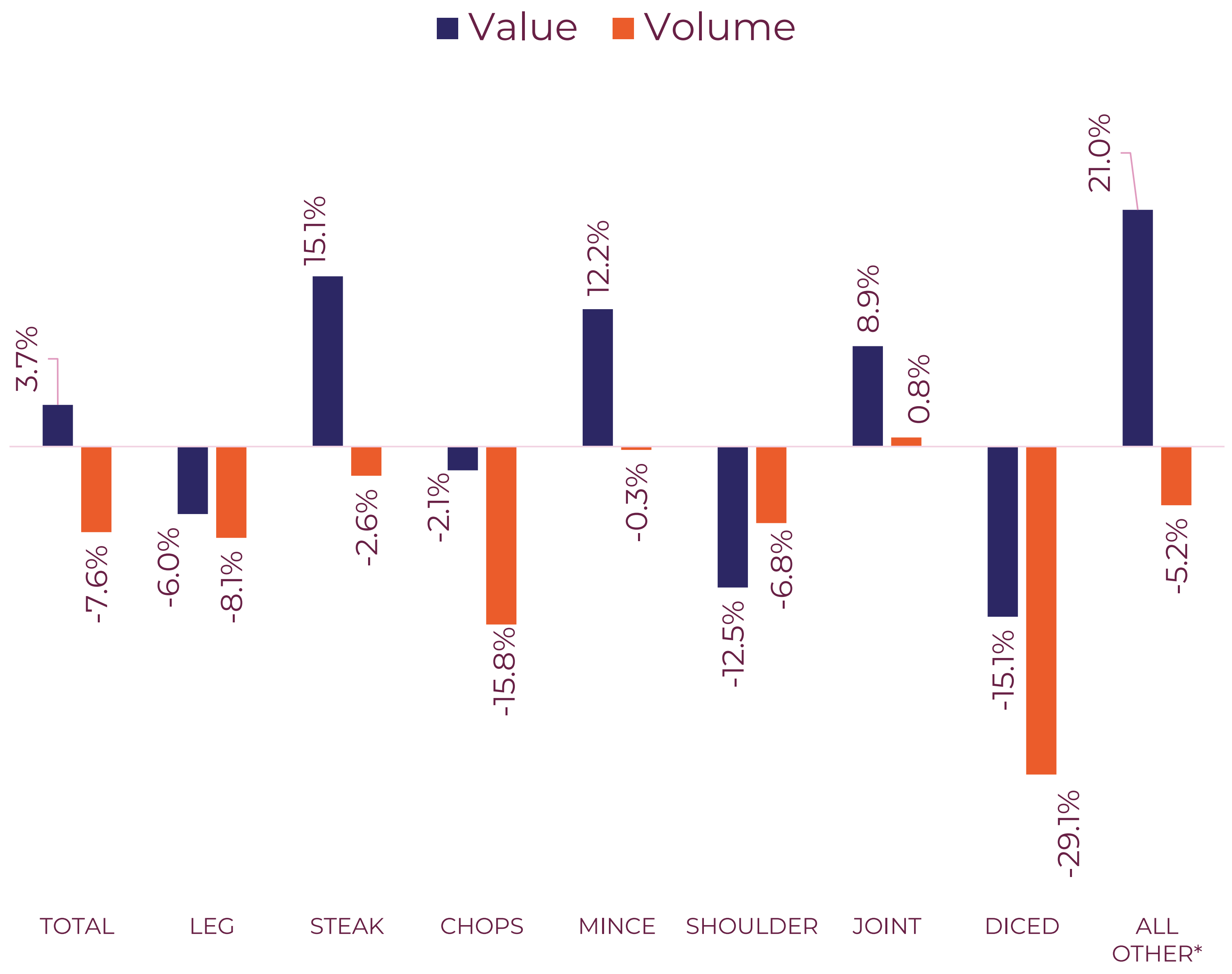
Only Lamb Joint remains in both value and volume growth, despite inflationary pressure.

## Total Scotland Lamb Market Value Breakdown by Sub-category (£m)*




**Total Market Value: £24.6m**

## Total Scotland Lamb Year-on-Year Change (%) by Value (£), Volume (KG)





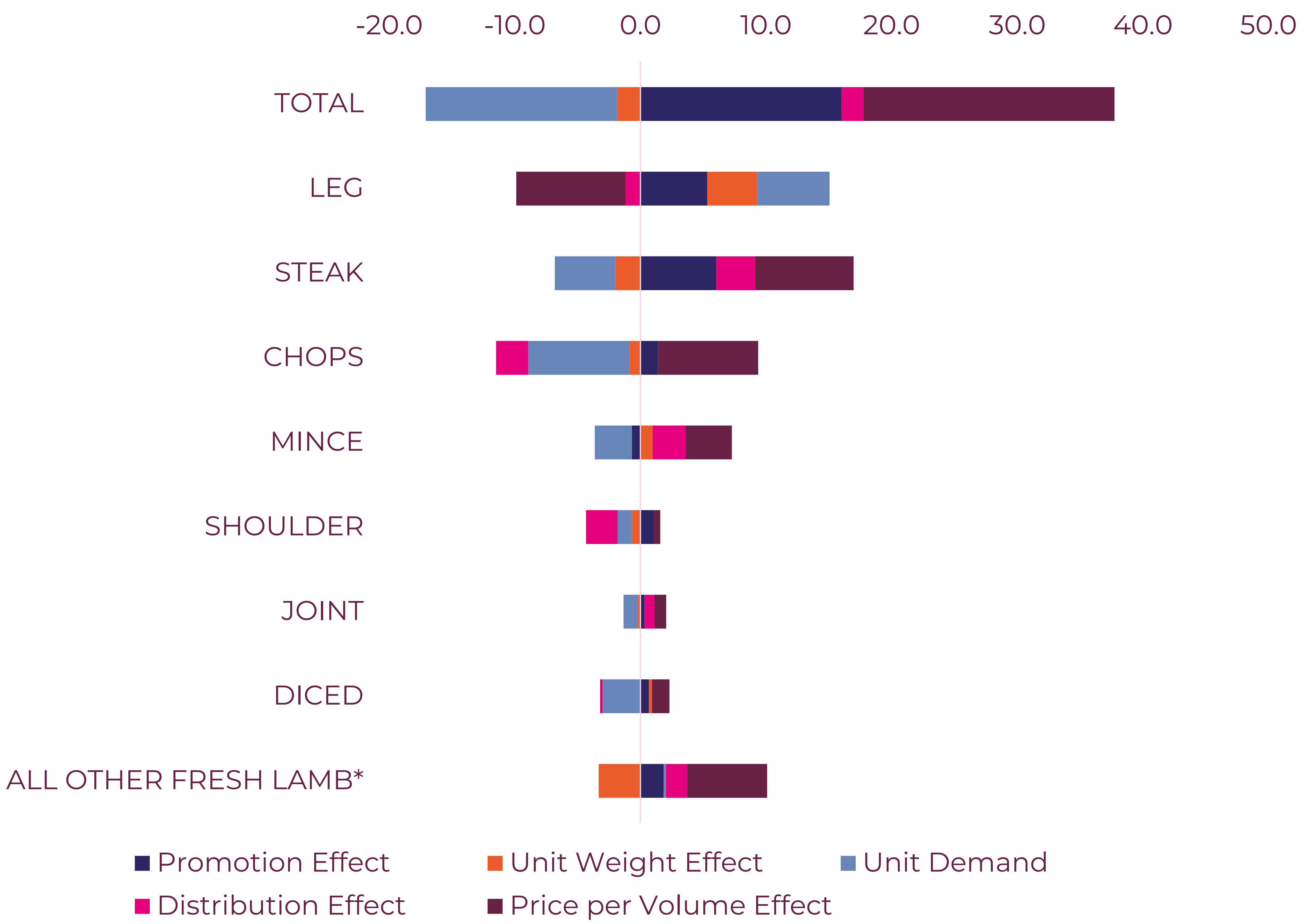

Source: Nielsen Total Coverage Scotland – 52 w/e 24 January 2026 *Includes Fillet Burger, Shank, Meatballs & Offal

**NOTE:** Figures represent Grocery Multiples channel (not Total Coverage – see source) as it is the only channel where the Promotion Effect measure can be calculated. As such, value sales figures differ slightly

Promo incrementality has been a key driver for Lamb, pushing as much growth YoY as volume pricing increases. This has been driven mostly by Leg & Steak, while Leg also saw a decline in volume pricing, which has benefited demand for this cut.

Elsewhere, the overall decline in demand (URoS) has been consistent across all remaining sub-categories.

## Total Lamb Market Breakdown by Value Drivers (£m)




| | £m | Change (£m) vs YA |
|---|---|---|
| TOTAL | £497.8 | +22.0 |
| LEG | £173.1 | +5.2 |
| STEAK | £89.9 | +10.2 |
| CHOPS | £68.8 | -2.1 |
| MINCE | £55.6 | +3.6 |
| SHOULDER | £25.5 | -1.4 |
| JOINT | £16.4 | +0.7 |
| DICED | £14.9 | -0.9 |
| ALL OTHER FRESH LAMB* | £53.6 | +6.8 |



Source: Nielsen Grocery Multiples GB – 52 w/e 24 January 2026 *Includes Fillet Burger, Shank, Meatballs & Offal

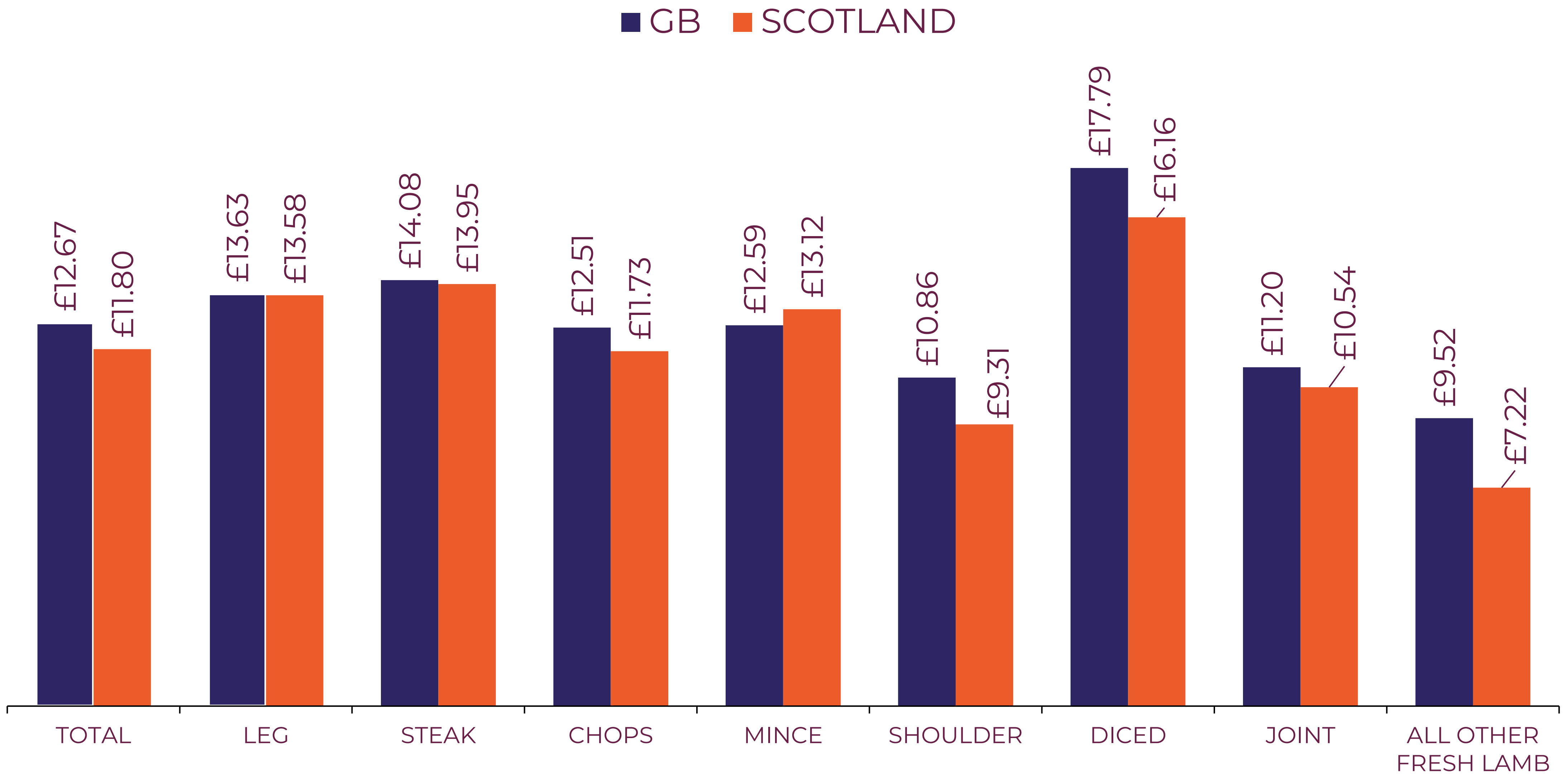
Lamb is roughly 7% cheaper in Scotland by volume, with Scots spending significantly more on chops, a cheaper cut, contributing to this difference. However, almost all categories are cheaper per kilogram in Scotland.

While we saw volume pricing growth of almost 30% in beef, this was maintained for the most part in the low-to-mid teens for Lamb, reducing to as little as 2.2% for Leg in Scotland. Average price growth of 12.2% in Scotland is slightly higher than GB, leading to a sharper drop in volume sales.

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026



## Total Lamb: Value Breakdown by Top Price per Kilogram (£)




| | TOTAL | LEG | STEAK | CHOPS | MINCE | SHOULDER | DICED | JOINT | ALL OTHER FRESH LAMB |
|---|---|---|---|---|---|---|---|---|---|
| **GB Change vs YA (%)** | +10.1% | +3.3% | +15.4% | +17.5% | +11.5% | -1.4% | +12.7% | +6.2% | +19.3% |
| **Scotland Change vs YA (%)** | +12.2% | +2.2% | +18.2% | +16.3% | +12.6% | -6.1% | +19.7% | +8.0% | +27.7% |

MEAT & POULTRY CATEGORY REPORT

## Total Lamb Promotional Activity: GB*

**Key**

**Promo Sales (%)**

Promo Sales (£)
(YoY £ growth)

**Total**

*excl. NI

**36.8%**
£194.8m
(+9.0% YoY)

**Leg**
**54.0%**
£93.5m
(+6.0% YoY)

**Chops**
**32.7%**
£22.5m
(+6.7% YoY)

**Shoulder**
**50.4%**
£12.9m
(+9.1% YoY)

**Joint**
**27.1%**
£4.5m
(+8.1% YoY)

**Steak**
**28.0%**
£25.2m
(+31.4% YoY)

**Mince**
**20.4%**
£11.4m
(-5.6% YoY)

**Diced**
**34.9%**
£5.2m
(+14.8% YoY)

**All Other Fresh Lamb**
**36.8%**
£19.7m
(+10.4% YoY)



Source: Nielsen Total Grocery Multiples GB – 52 w/e 24 January 2026 *Includes Fillet, Burger, Shank, Meatballs & Offal

THE KNOWLEDGE BANK
Turning insight into action

Almost £2 in every £5 spent on Lamb over the previous year came from promotions, far higher than Beef.

Lamb Leg saw the highest promo sales, accounting for more than half of overall sales, which has led to only a slight drop in volume sales at GB level. Only Mince saw a decline in promo activity YoY, which will have contributed to its overall price increase.

In Scotland, activity was higher (37.5% of sales), indicating that Scots are relying more on promotional activity.

THE KNOWLEDGE BANK

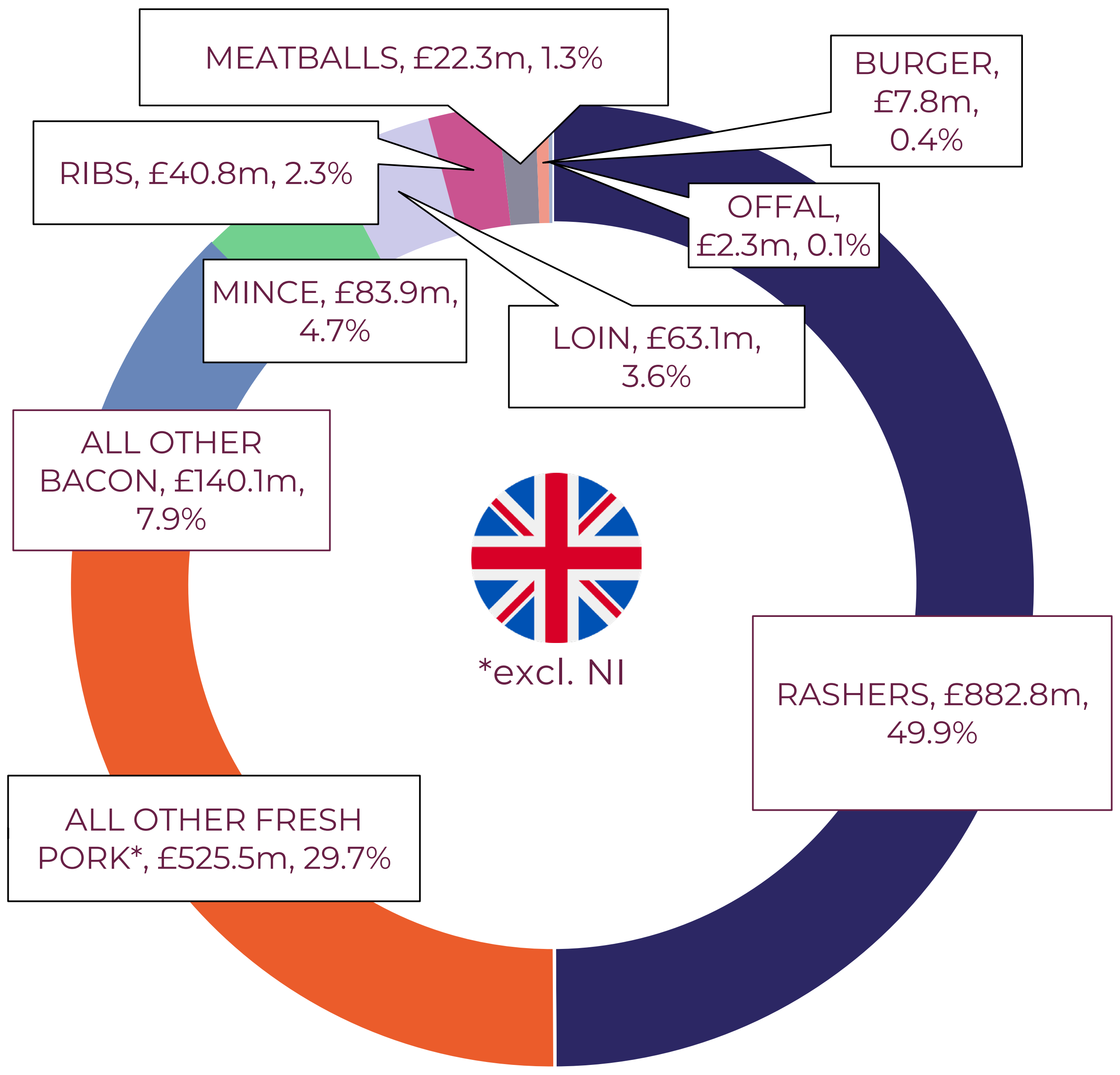
Delivered by
**Scotland Food & Drink Partnership**

# Pork (incl. Bacon)

The Pork & Bacon market regressed slightly YoY to a £1.77bn valuation, driven almost exclusively by Bacon rather than other Pork cuts as shoppers purchase less.

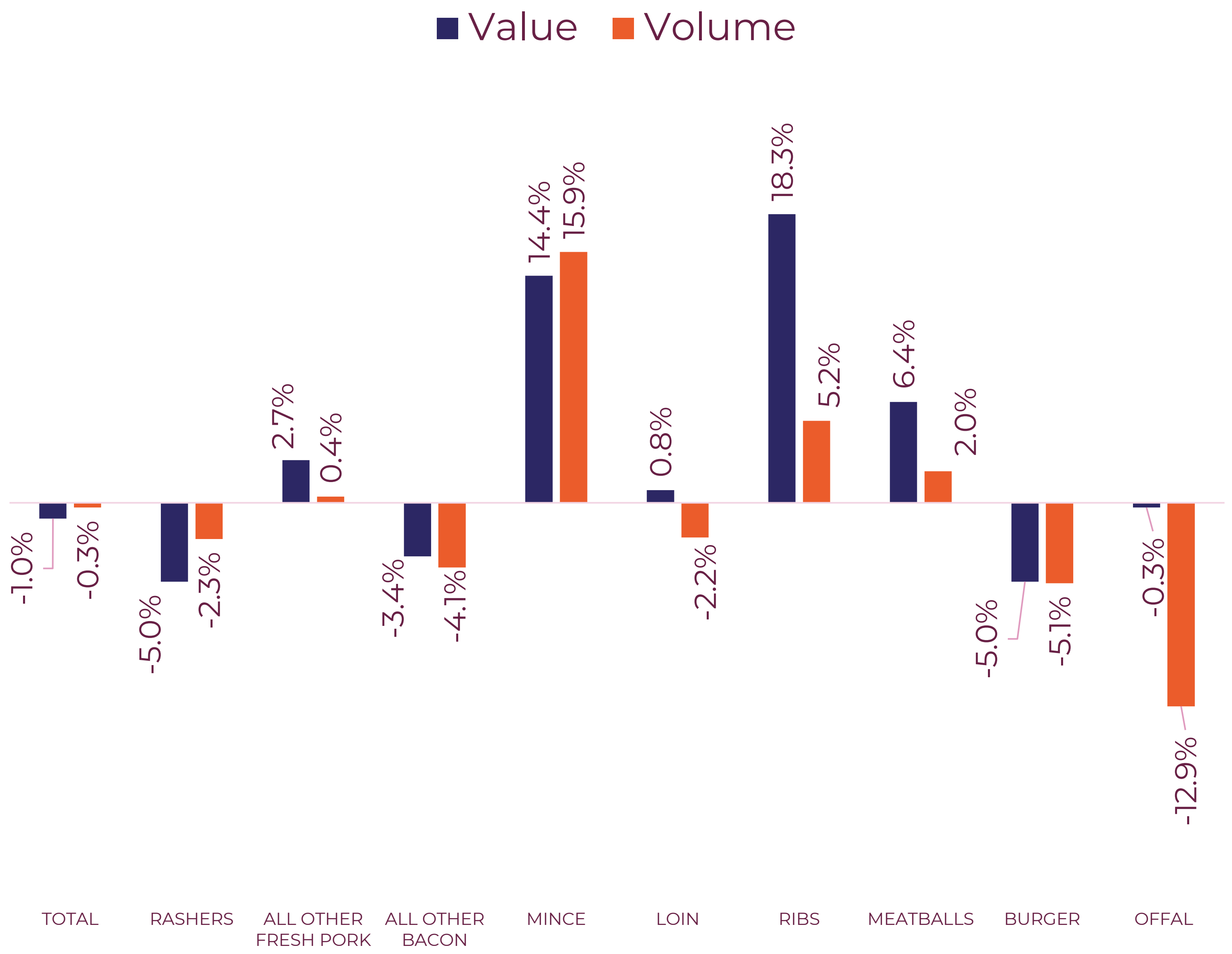
Rashers, which account for almost half the market, saw the most notable decline, likely as some shoppers make the UPF connection. Elsewhere, in Pork, Mince saw the strongest growth of all sub-categories, pushing value and volume above 14% growth.

**Total GB Pork & Bacon Market Value Breakdown by Sub-category (£m)***




**Total Market Value: £1.77bn**

**Total GB Pork & Bacon Year-on-Year Change (%) by Value (£), Volume (KG)**





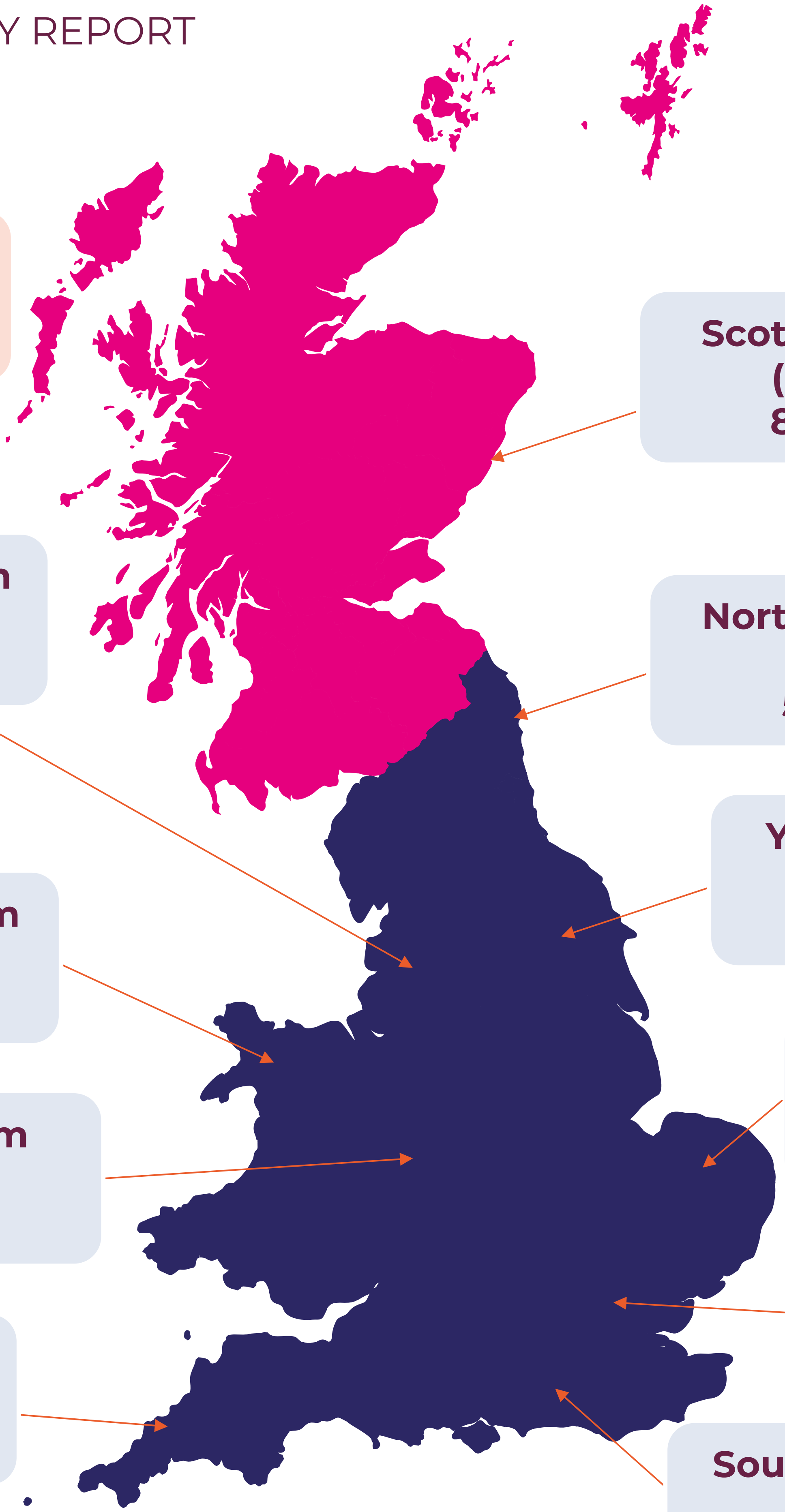

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026 *Contains Steaks, Joints & Chops

THE KNOWLEDGE BANK
Turning insight into action

MEAT & POULTRY CATEGORY REPORT

## Total Pork & Bacon Market Value Breakdown by Region (£m)

**Total Coverage GB: £1,768.7m**
**(-1.0% YoY)**
**100% Share**



**Scotland: £148.6m**
**(-2.3% YoY)**
**8.4% Share**

**Lancashire & Border: £209.9m**
**(-1.8% YoY)**
**11.9% Share**

**North East: £88.8m**
**(-1.2% YoY)**
**5.0% Share**

**Yorkshire: £179.4m**
**(-1.4% YoY)**
**10.1% Share**

**Wales & West: £163.2m**
**(-1.2% YoY)**
**9.2% Share**

**East of England: £146.2m**
**(+0.1% YoY)**
**8.3% Share**

**Central: £270.6m**
**(-1.4% YoY)**
**15.3% Share**

**London: £308.5m**
**(-0.2% YoY)**
**17.4% Share**

**South West: £66.9m**
**(-0.8% YoY)**
**3.8% Share**

**South & South East: £186.5m**
**(-0.6% YoY)**
**10.5% Share**

Scotland fell in share to 8.4% this year, below its fair share of Fresh Meat and equal to an undertrade of £14.1m.

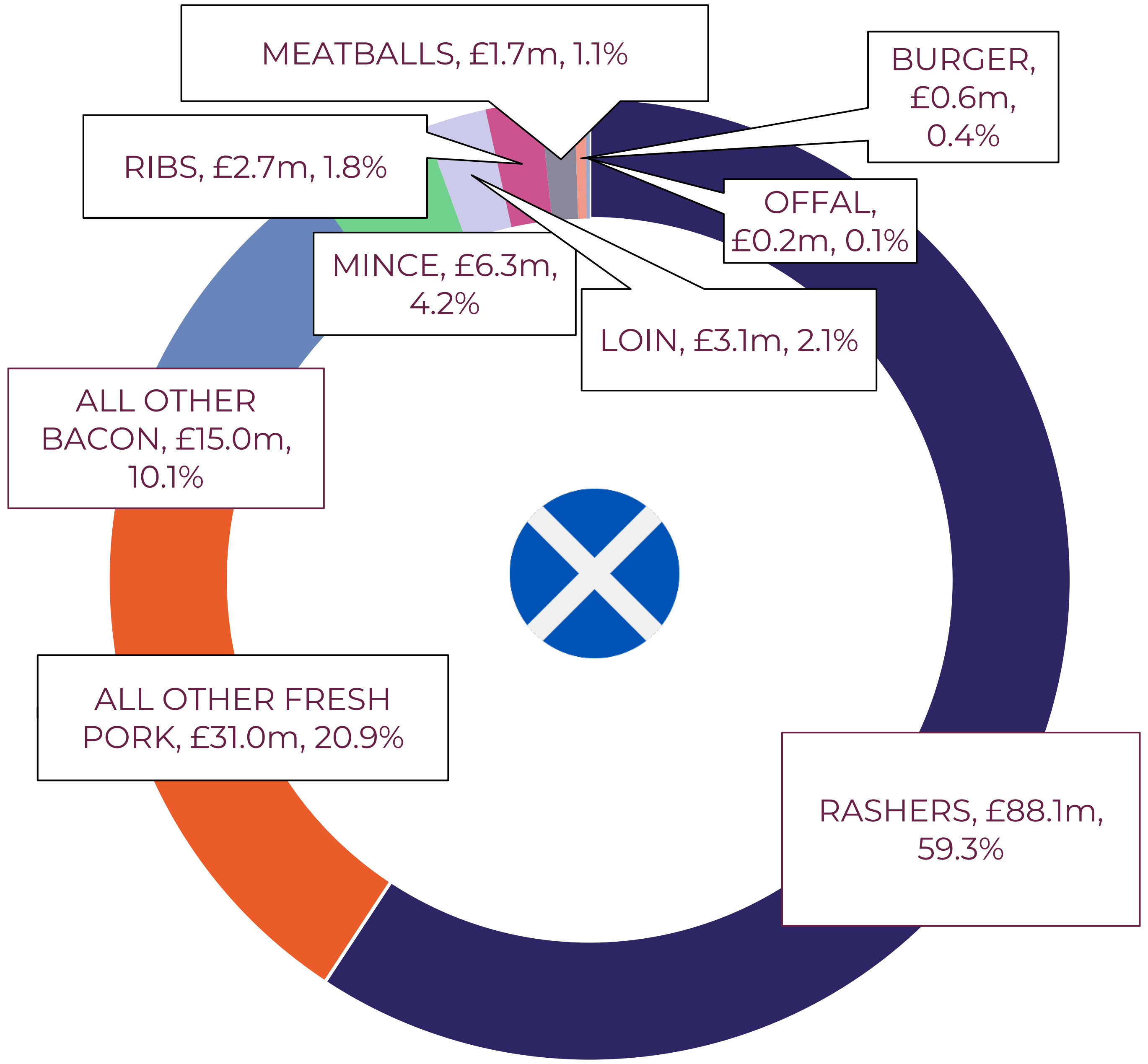
Like previous reporting, East of England, a major hub for pork production, is an area performing relatively well, being the only region to see value growth.

Source: Nielsen Total Coverage GB – 52w/e 24 January 2026

Scotland underperforms vs GB, again driven mostly by Bacon, but also seeing a much sharper decline in smaller categories like Loin & Burger.

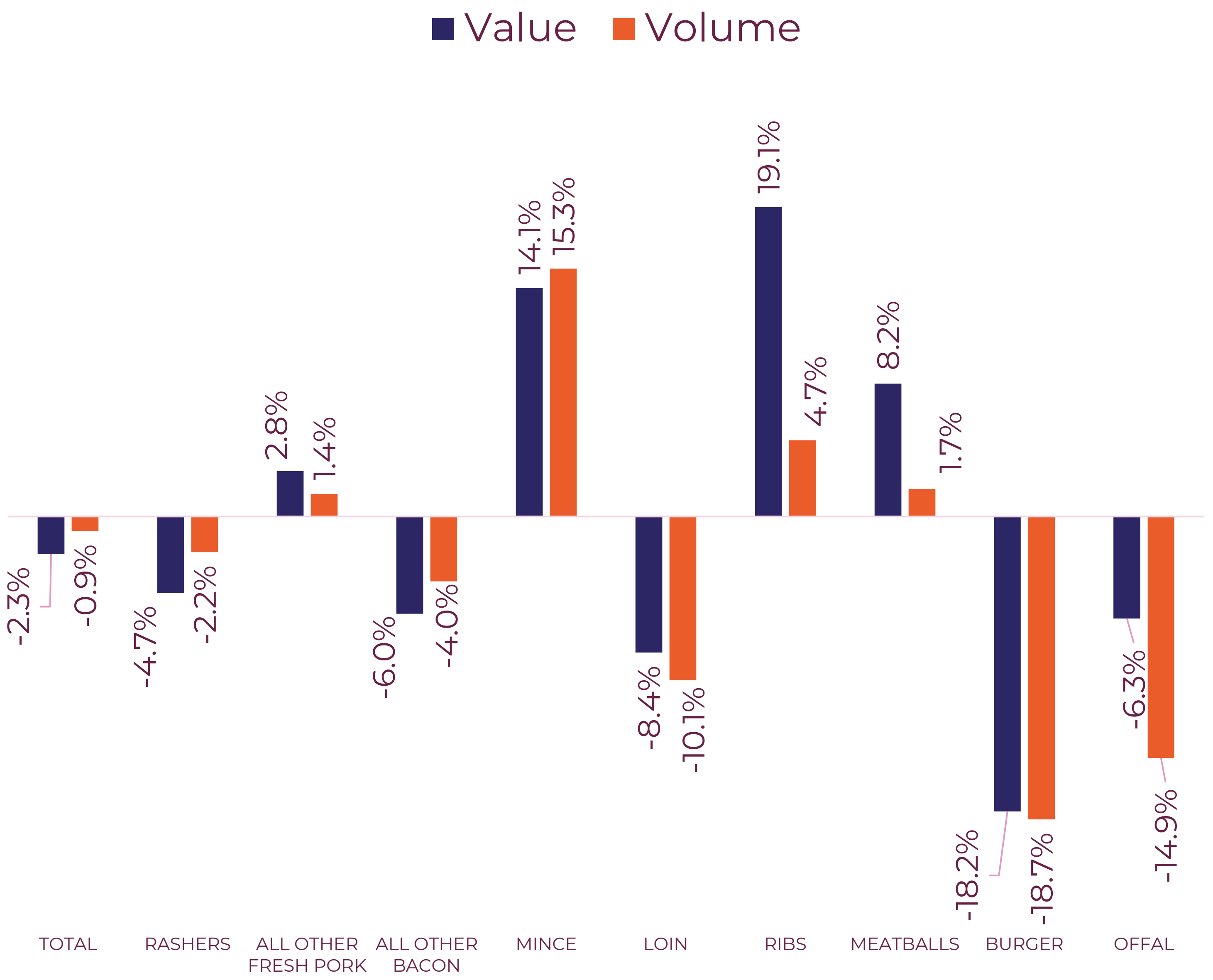
Scottish consumers over-index on Bacon rashers spend (around 120 vs GB base) but are also cutting back expenditure similar to the wider GB market.

**Total Scotland Pork & Bacon Market Value Breakdown by Sub-category (£m)***




**Total Market Value: £148.6m**

**Total Scotland Pork & Bacon Year-on-Year Change (%) by Value (£), Volume (KG)**






Source: Nielsen Total Coverage Scotland – 52 w/e 24 January 2026 *Contains Steaks, Joints & Chops

**NOTE:** Figures represent Grocery Multiples channel (not Total Coverage – see source) as it is the only channel where the Promotion Effect measure can be calculated. As such, value sales figures differ slightly

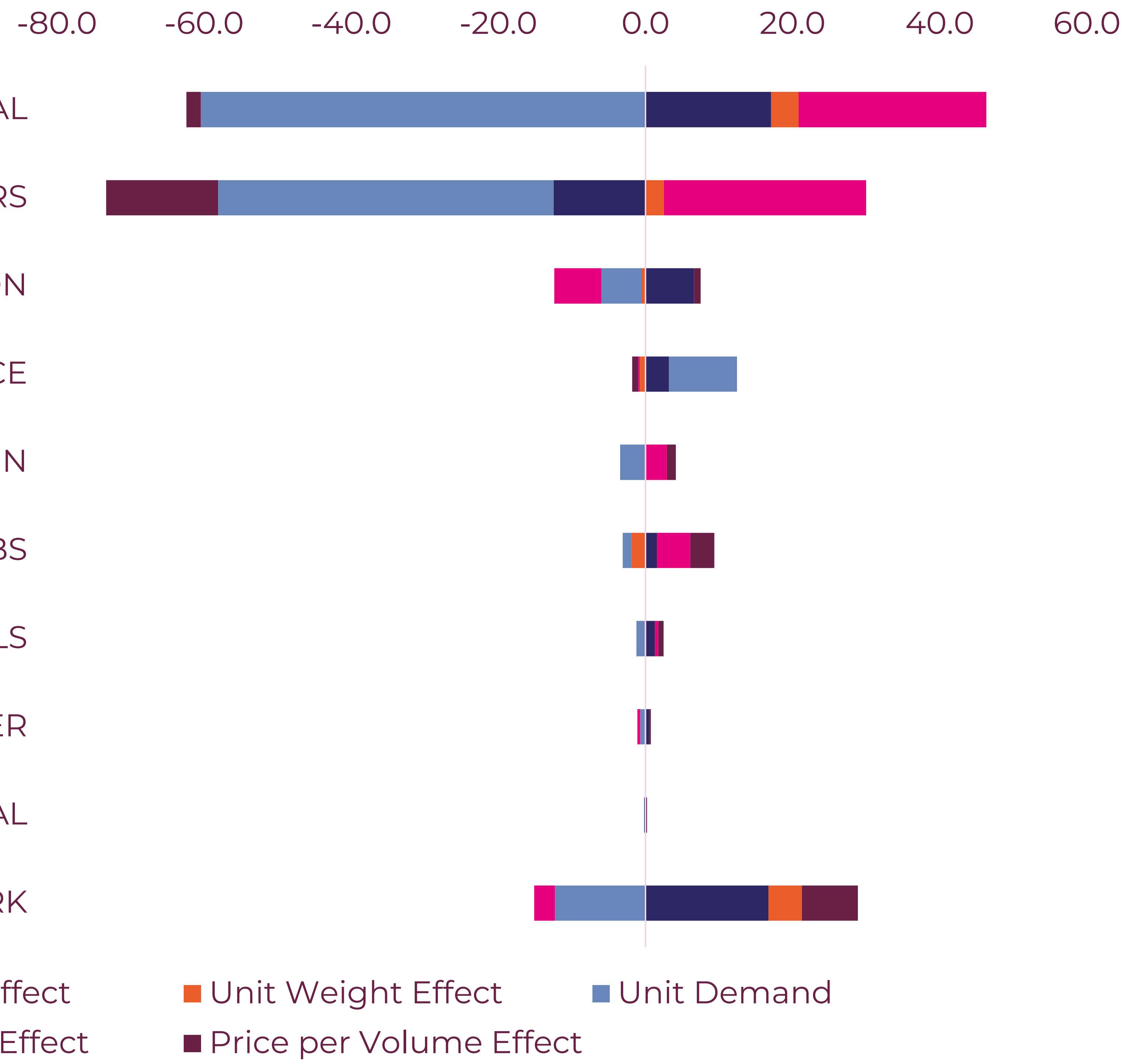
THE KNOWLEDGE BANK

Pork has been an interesting category in that volume pricing has decreased YoY, but demand has dropped, almost entirely driven by Bacon Rashers. Shopper concern around Ultra-Processed Foods is potentially impacting consumption here.

A slight increase in unit weight effect suggests shoppers are trading up to slightly larger packs on occasions, while a growing distribution effect has stemmed further decline.

## Total Pork & Bacon Market Breakdown by Value Drivers (£m)

| | £m | Change (£m) vs YA |
|---|---|---|
| TOTAL | £1719.7 | -15.9 |
| RASHERS | £844.0 | -43.4 |
| ALL OTHER BACON | £139.0 | -4.8 |
| MINCE | £83.8 | +10.6 |
| LOIN | £63.0 | +0.7 |
| RIBS | £40.8 | +6.3 |
| MEATBALLS | £16.4 | +1.2 |
| BURGER | £7.5 | -0.4 |
| OFFAL | £2.3 | -0.01 |
| ALL OTHER FRESH PORK | £523.0 | +13.8 |

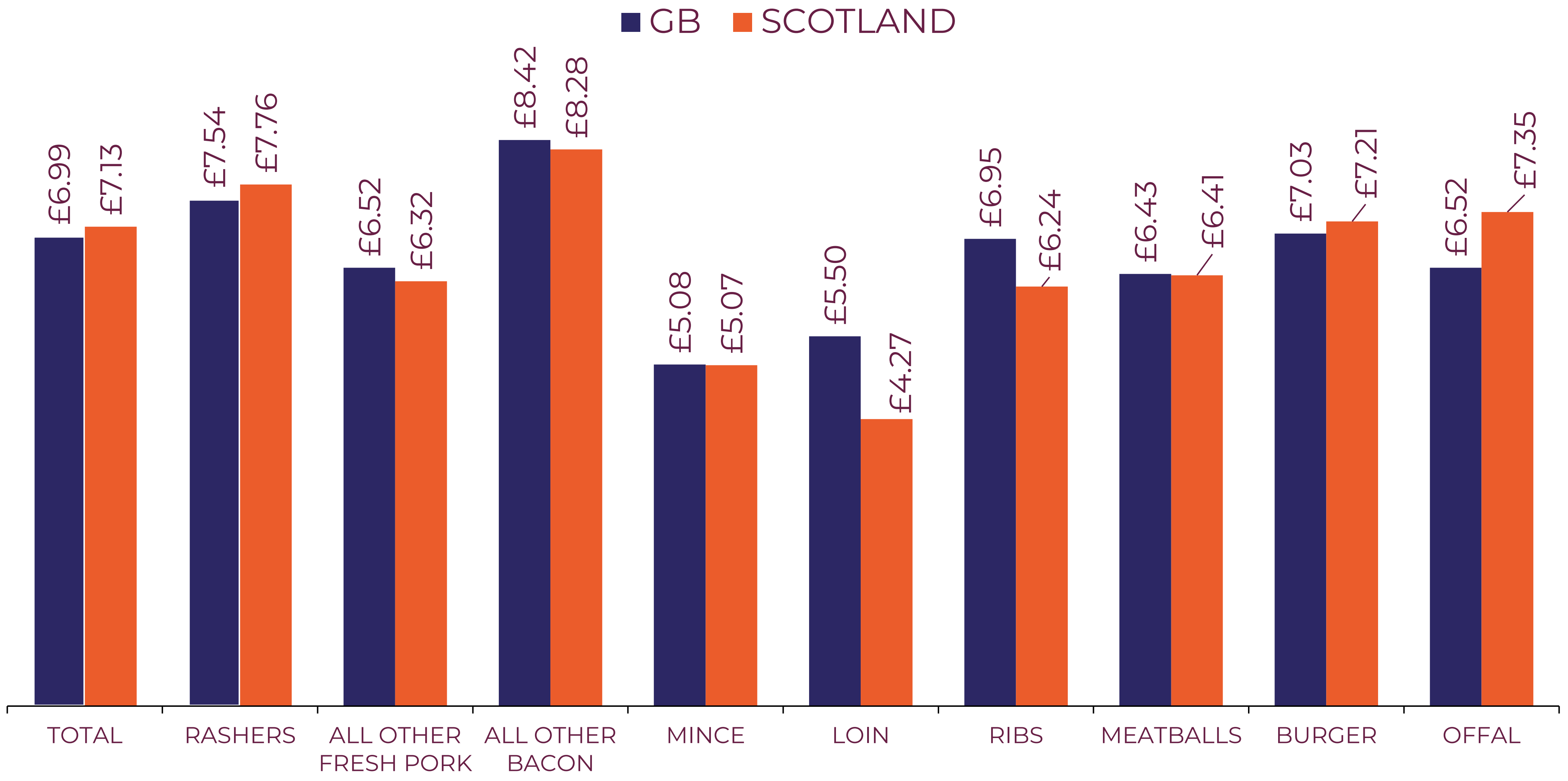


Scotland continues to command a slight premium in volume pricing vs GB, largely through its higher affinity towards Bacon Rashers.

Pork on the other hand remains cheaper in Scotland for the most part.

Only Rashers & Mince saw volume pricing decrease YoY across GB & Scotland, however, mince has been the only segment to experience increased demand.

## Total Pork & Bacon: Value Breakdown by Top Price per Kilogram (£)




| | TOTAL | RASHERS | ALL OTHER FRESH PORK | ALL OTHER BACON | MINCE | LOIN | RIBS | MEATBALLS | BURGER | OFFAL |
|---|---|---|---|---|---|---|---|---|---|---|
| **GB Change vs YA (%)** | -0.7% | -2.7% | +2.3% | +0.8% | -1.3% | +3.0% | +12.4% | +4.3% | +0.1% | +14.5% |
| **Scotland Change vs YA (%)** | -1.5% | -2.5% | +1.5% | -2.1% | -1.0% | +1.9% | +13.8% | +6.4% | +0.6% | +10.1% |

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026

THE KNOWLEDGE BANK
Turning insight into action

## Total Pork & Bacon Promotional Activity: GB

**Key**
**Promo Sales (%)**
Promo Sales (£)
(YoY £ growth)

**Total**
*excl. NI

**28.7%**
£494.1m
(+3.6% YoY)

**Rashers**
**23.6%**
£199.0m
(-5.9% YoY)

**All Other Bacon**
**25.7%**
£35.7m
(+22.5% YoY)

**Loin**
**49.1%**
£30.9m
(-0.4% YoY)

**Meatballs**
**35.0%**
£5.7m
(+28.1% YoY)

**All Other Fresh Pork**
**35.5%**
£185.6m
(+9.9% YoY)

**Mince**
**18.5%**
£15.5m
(+25.9% YoY)

**Ribs**
**46.0%**
£18.8m
(+9.3% YoY)

**Burger & Offal**
**29.3%**
£2.9m
(+13.8% YoY)

The category saw an increase to promo activity over the year, up to 28.7% of sales and closing in on £500m sold on promotion.

This was pushed mostly by Pork categories such as Mince & Meatballs which have increased spend on promotion by over 25%.

All Other Fresh Pork, which includes the likes of Steaks & Joints, increased activity the most from an absolute perspective, up almost £17m over the year.



Source: Nielsen Total Grocery Multiples GB – 52 w/e 24 January 2026

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

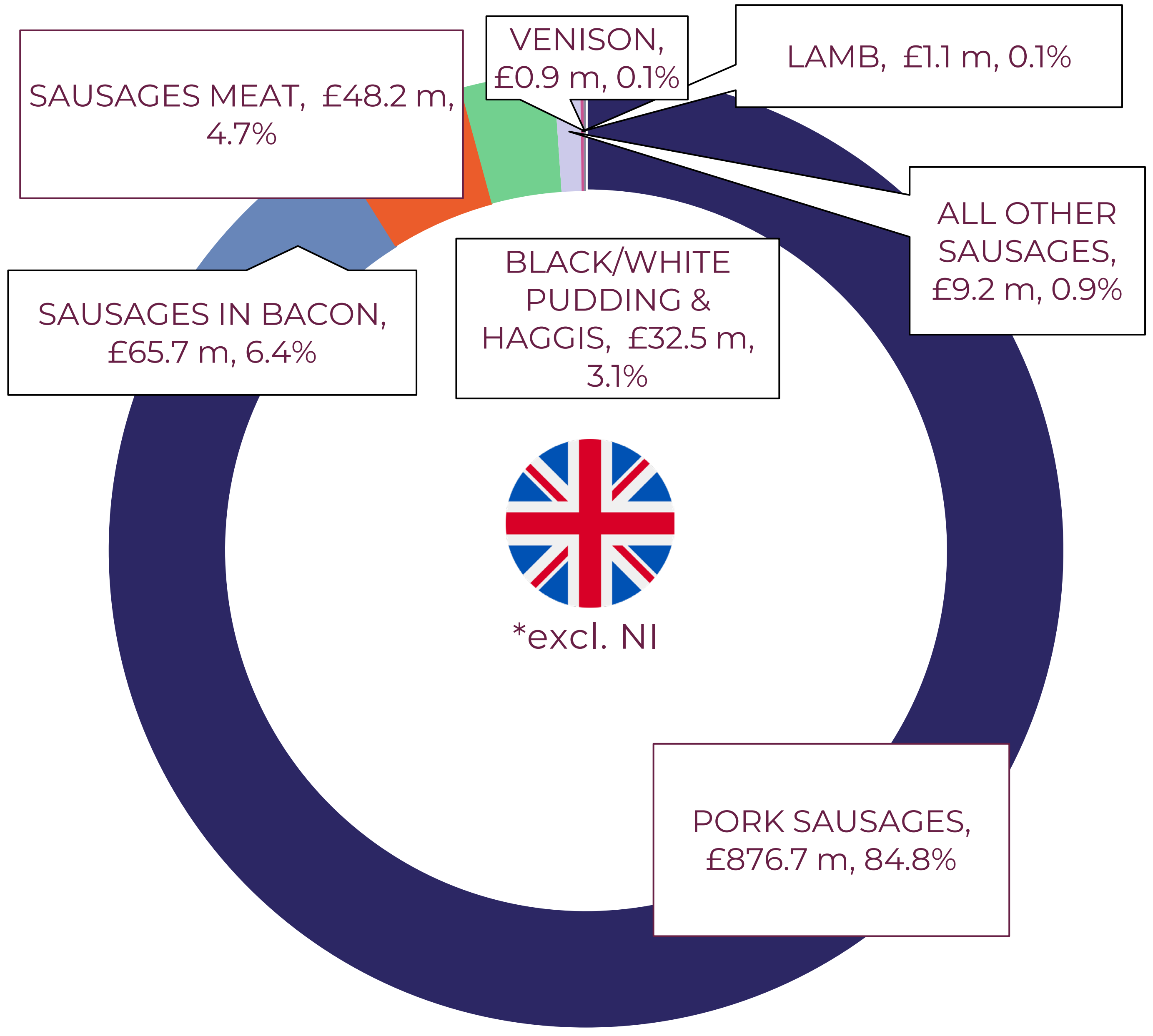
# Sausages

Sausages have surpassed the £1bn valuation for the first time in retail, though growth has been lower and volume led.

This was primarily driven by Pork Sausages, which accounts for more than £5 of every £6 spent, but sub-categories like Pigs in Blankets (Sausages in Bacon) has grown higher proportionally.

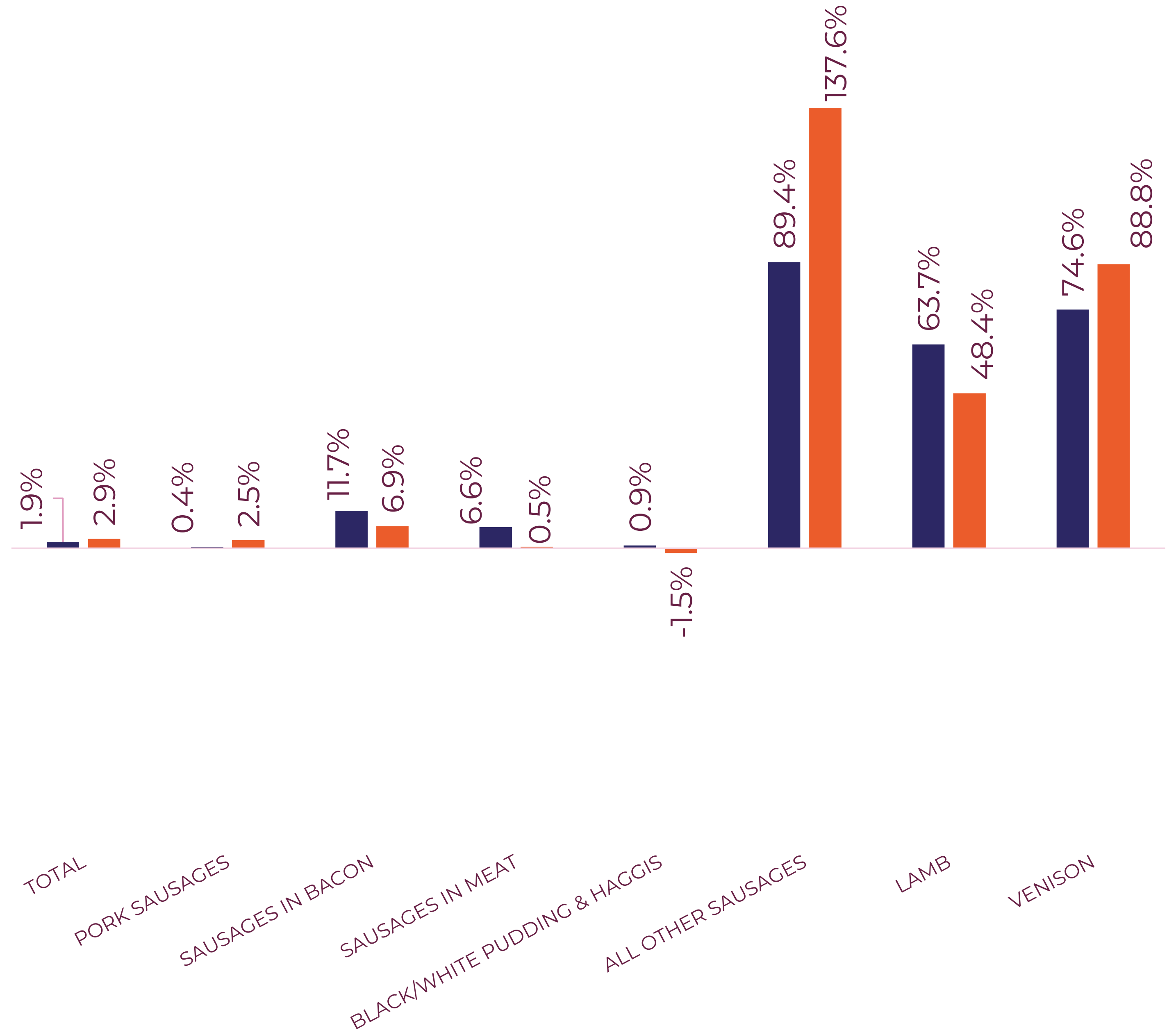
Smaller categories like Lamb & Venison sausages have enjoyed significant advancement in distribution but on a localised scale.

**Total GB Sausages Market Value Breakdown by Sub-category (£m)***




**Total Market Value: £1.03bn**

**Total GB Sausages Year-on-Year Change (%) by Value (£), Volume (KG)**





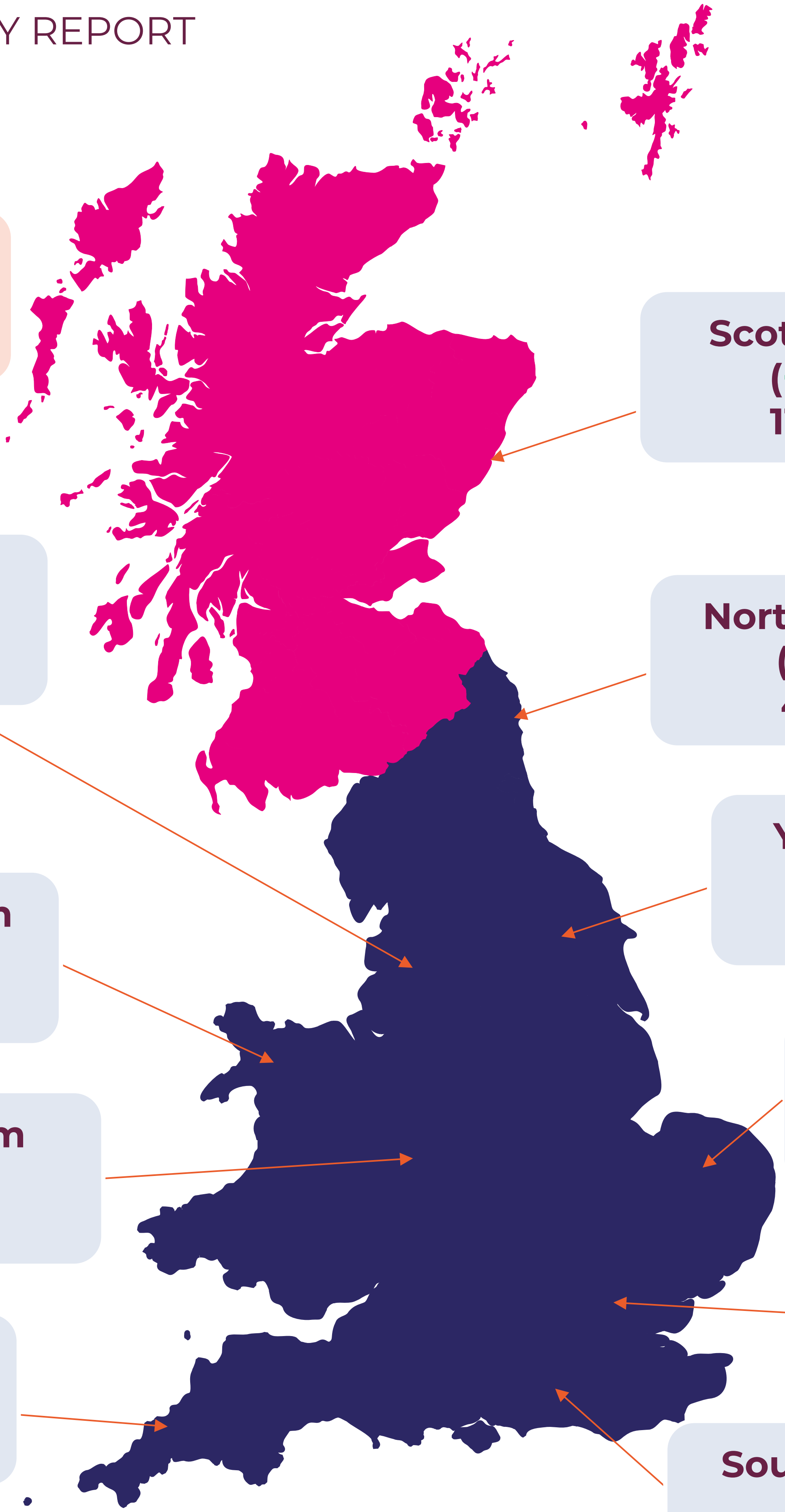

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026

THE KNOWLEDGE BANK

Turning insight into action

## Total Sausages Market Value Breakdown by Region (£m)

MEAT & POULTRY CATEGORY REPORT



**Total Coverage GB: £1,034.6m**
**(+1.9% YoY)**
**100% Share**

**Scotland: £115.5m**
**(+1.4% YoY)**
**11.2% Share**

**Lancashire & Border: £119.1m**
**(+1.6% YoY)**
**11.5% Share**

**North East: £50.8m**
**(+2.0% YoY)**
**4.9% Share**

**Yorkshire: £98.6m**
**(+2.5% YoY)**
**9.5% Share**

**Wales & West: £92.2m**
**(+1.8% YoY)**
**8.9% Share**

**East of England: £91.0m**
**(+2.8% YoY)**
**8.8% Share**

**Central: £144.3m**
**(+1.6% YoY)**
**13.9% Share**

**London: £167.3m**
**(+1.3% YoY)**
**16.2% Share**

**South West: £39.6m**
**(+2.2% YoY)**
**3.8% Share**

**South & South East: £116.1m**
**(+2.1% YoY)**
**11.2% Share**

Scotland holds an 11.2% share of the Fresh Sausages category, equal to roughly £20.3m in overtrade.

Sales are growing slowly in Scotland but remain slightly below the market average.

Eastern regions of GB grow above the rate of market average, along with both southernmost regions. London is currently the slowest market for growth within the Sausages category.

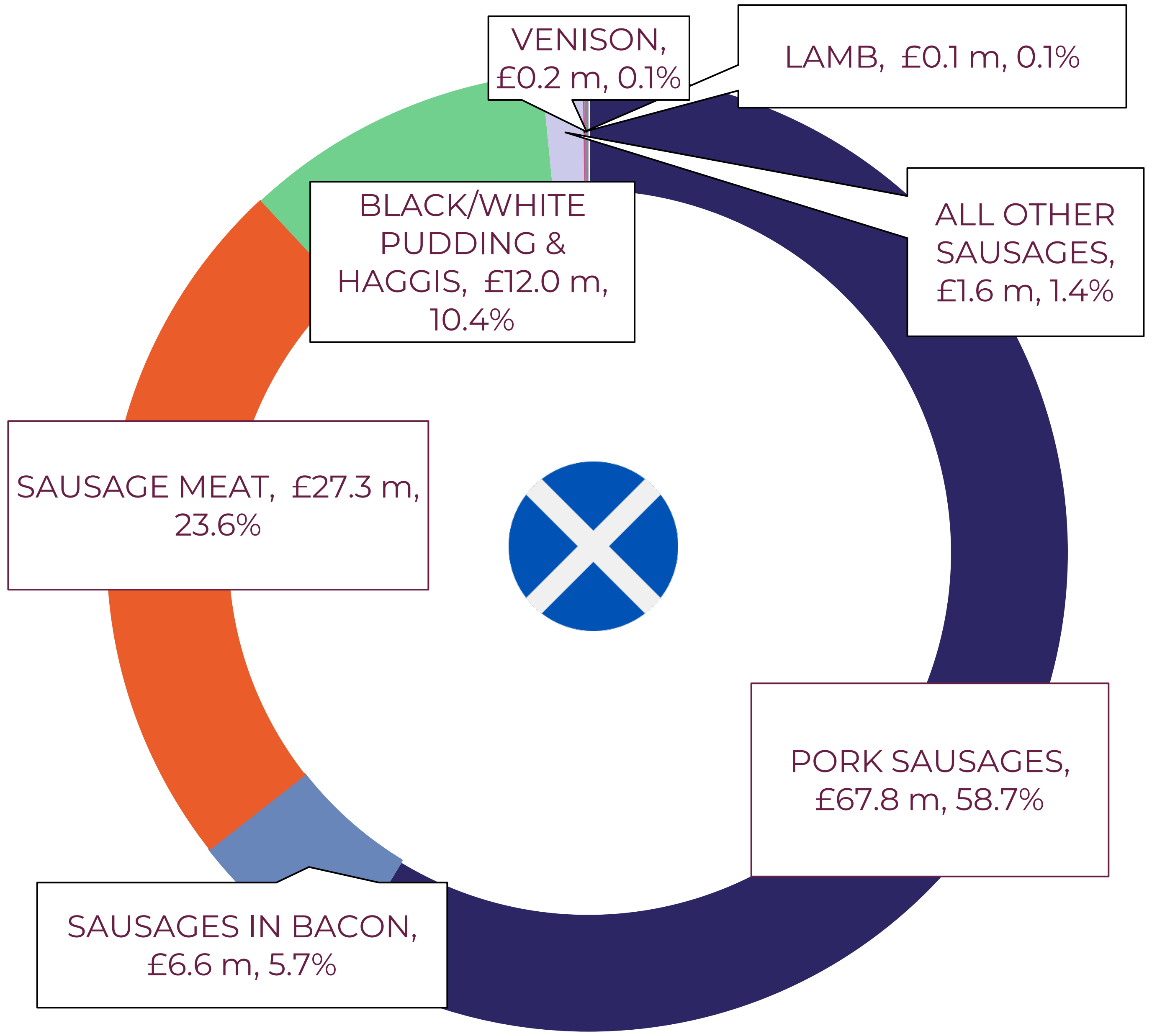
Source: Nielsen Total Coverage GB – 52w/e 24 January 2026

THE KNOWLEDGE BANK

In Scotland, the performance of segments varies significantly and has a significant regional importance pushing the overtrade.

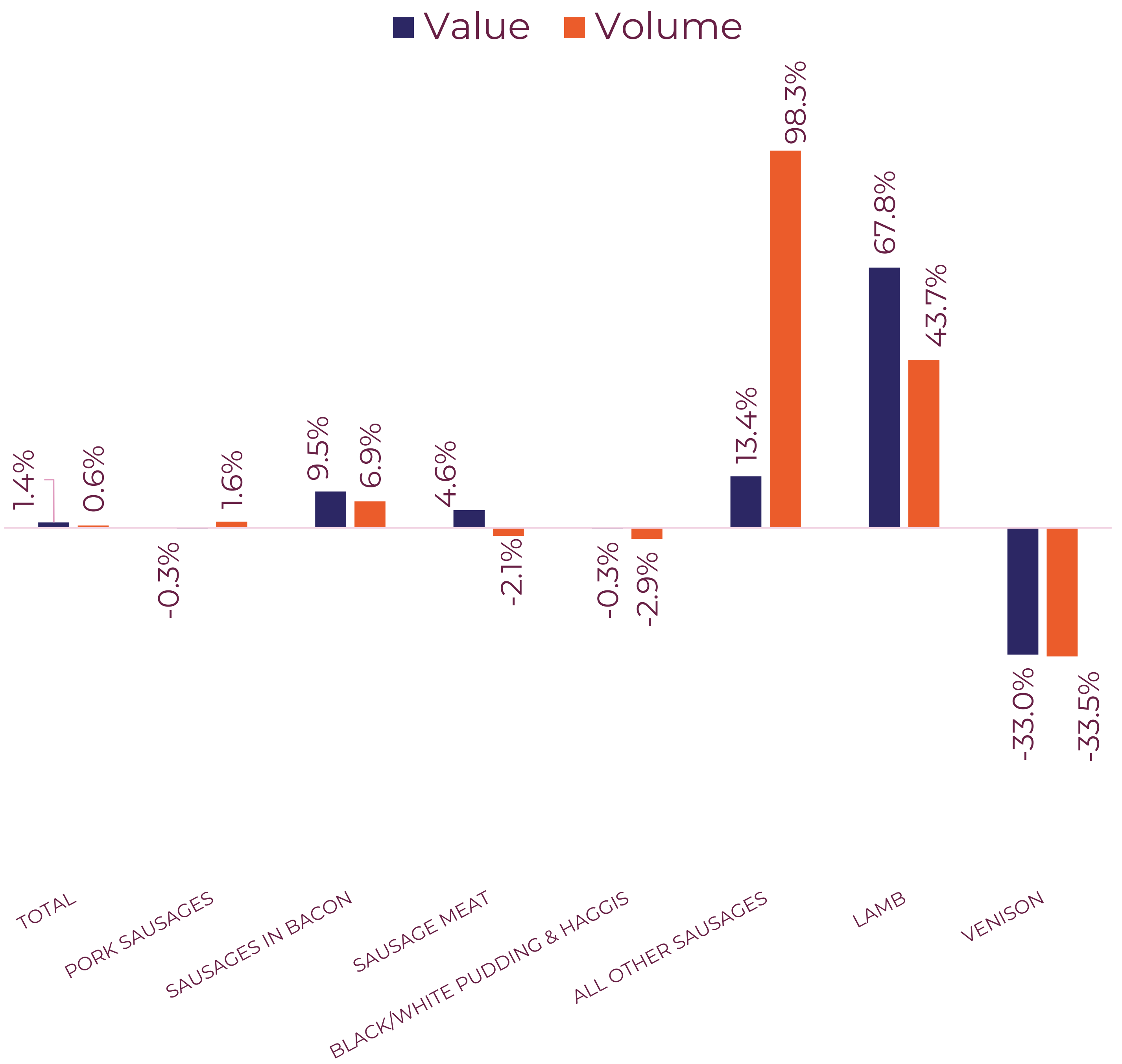
Sausage Meat and the Black/White Pudding & Haggis sub-categories account for a greater share of sales from Pork Sausages. This is predominantly due to the importance of Scottish Brands such as Simon Howie, Malcolm Allan, Lawson's, etc. That said, these categories have not performed well compared to the wider GB market.

**Total Scotland Sausages Market Value Breakdown by Sub-category (£m)***




**Total Market Value: £115.5m**

**Total Scotland Sausages Year-on-Year Change (%) by Value (£), Volume (KG)**






Source: Nielsen Total Coverage Scotland – 52 w/e 24 January 2026

**NOTE:** Figures represent Grocery Multiples channel (not Total Coverage – see source) as it is the only channel where the Promotion Effect measure can be calculated. As such, value sales figures differ slightly

THE KNOWLEDGE BANK

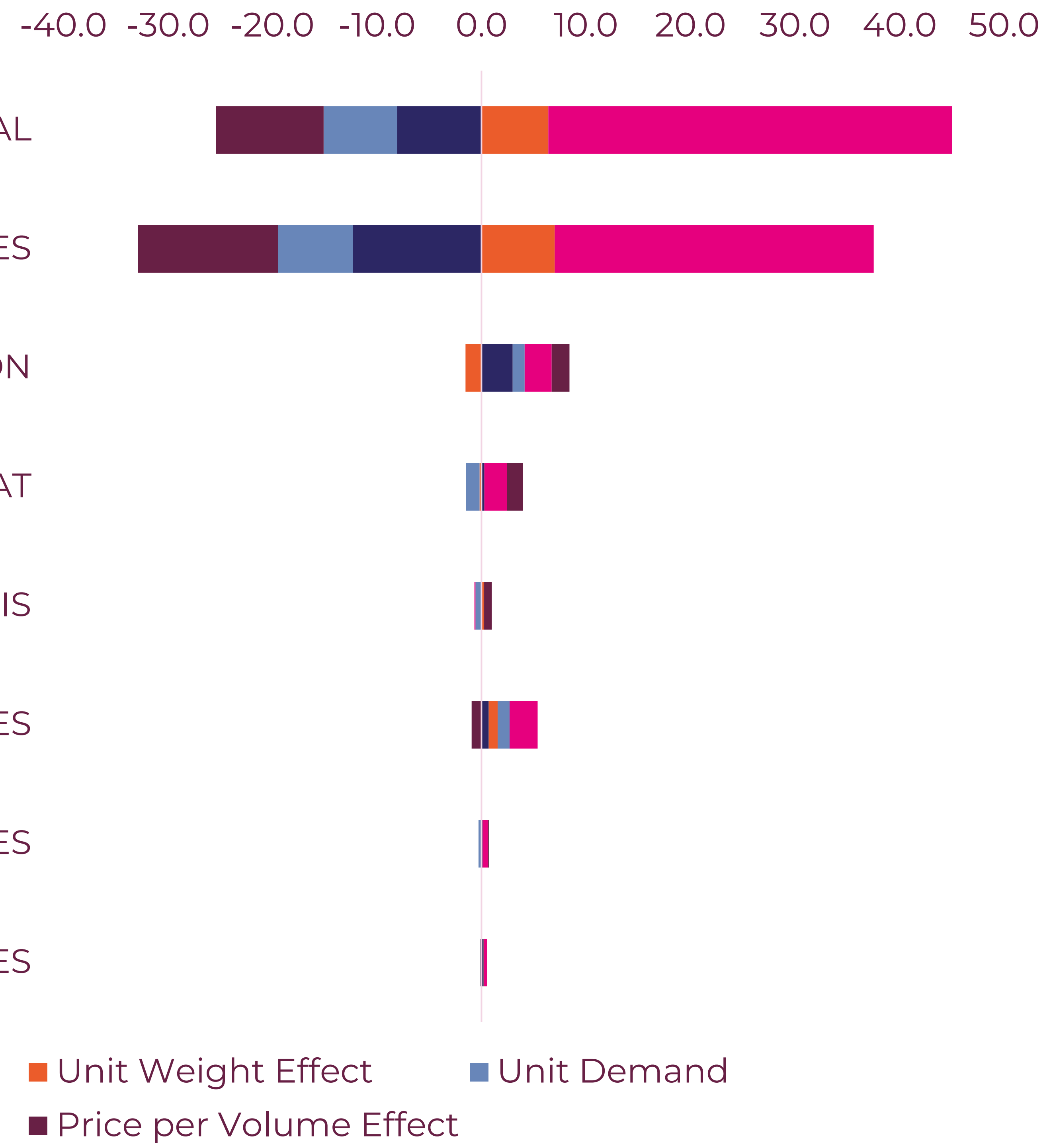
Overall, growth for Sausages is driven by increases in distribution, which has prevented the market from going into a strong decline.

Despite a drop in volume pricing, there has been a fall in unit demand (URoS) within the Pork Sausages sub-category.

This indicates that the category is under the same pressure as Bacon Rashers, which is growing health concerns around UPF's

**Total Sausages Market Breakdown by Value Drivers (£m)**

| | £m | Change (£m) vs YA |
|---|---|---|
| TOTAL | £1,007.4 | +19.6 |
| PORK SAUSAGES | £853.1 | +4.6 |
| SAUSAGES IN BACON | £65.6 | +6.9 |
| SAUSAGE MEAT | £47.0 | +2.5 |
| BLACK/WHITE PUDDING & HAGGIS | £30.7 | +0.3 |
| ALL OTHER SAUSAGES | £8.9 | +4.4 |
| LAMB SAUSAGES | £1.1 | +0.5 |
| VENISON SAUSAGES | £0.9 | +0.4 |






Source: Nielsen Grocery Multiples GB – 52 w/e 24 January 2026

MEAT & POULTRY CATEGORY REPORT

Sausages in Scotland have accelerated their premium vs GB, now roughly 6% more expensive in Scotland compared to GB from a volume pricing perspective, though will be influenced by an increased participation of quality Scottish brands.

The growth in Scottish average prices will be driven by a greater focus on Sausage Meat & Black/White Pudding & Haggis segments amongst Scottish consumers, which have experienced greater growth rates in volume pricing.

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026



**Total Sausages: Value Breakdown by Top Price per Kilogram (£)**


| | TOTAL | PORK SAUSAGES | SAUSAGES IN BACON | SAUSAGE MEAT | BLACK/WHITE PUDDING & HAGGIS | ALL OTHER SAUSAGES | LAMB SAUSAGES | VENISON SAUSAGES |
|---|---|---|---|---|---|---|---|---|
| **GB Change vs YA (%)** | -1.0% | -2.1% | +4.5% | +6.1% | +2.5% | -20.3% | +10.3% | -7.5% |
| **Scotland Change vs YA (%)** | +0.8% | -1.9% | +2.4% | +6.9% | +2.4% | -42.8% | +16.7% | +0.8% |

THE KNOWLEDGE BANK
Turning insight into action

## Total Sausages Promotional Activity: GB

**Key**

**Promo Sales (%)**
Promo Sales (£)
(YoY £ growth)

**Total** *excl. NI

**35.0%**
£352.6m
(-2.2% YoY)

**Pork Sausages**
**35.1%**
£299.6m
(-4.0% YoY)

**Sausages in Bacon**
**47.1%**
£30.9m
(+10.7% YoY)

**Sausage Meat**
**27.6%**
£13.0m
(+2.3% YoY)

**Black/White Pudding & Haggis**
**21.9%**
£6.7m
(-0.4% YoY)

**All Other Sausages**
**20.0%**
£1.8m
(+63.0% YoY)

**Lamb Sausages**
**27.9%**
£0.30m
(+58.8% YoY)

**Venison Sausages**
**43.8%**
£0.41m
(+101.6% YoY)

Promo activity in Sausages fell YoY, driven by a reduction in Pork Sausages as already seen through the driver chart.

Sausages in Bacon grows well, up roughly £3m YoY, while Sausage Meat contributes another couple hundred thousand in absolute growth.

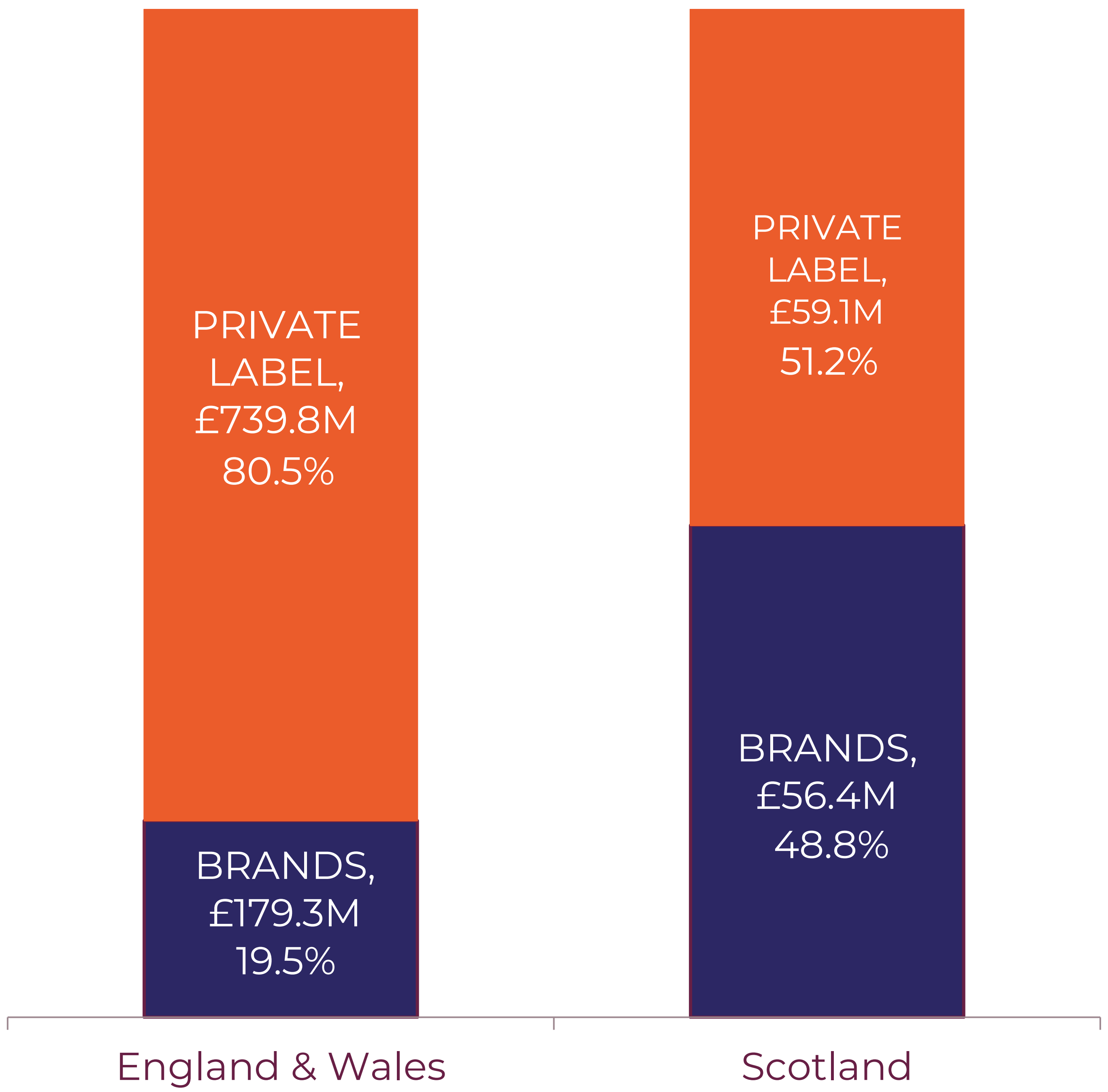
Black/White Pudding and Haggis has fallen in activity YoY, despite promoting roughly 40% less than total category, suggesting an opportunity for Scottish producers to increase activity further to drive sales.

Source: Nielsen Total Grocery Multiples GB – 52 w/e 24 January 2026

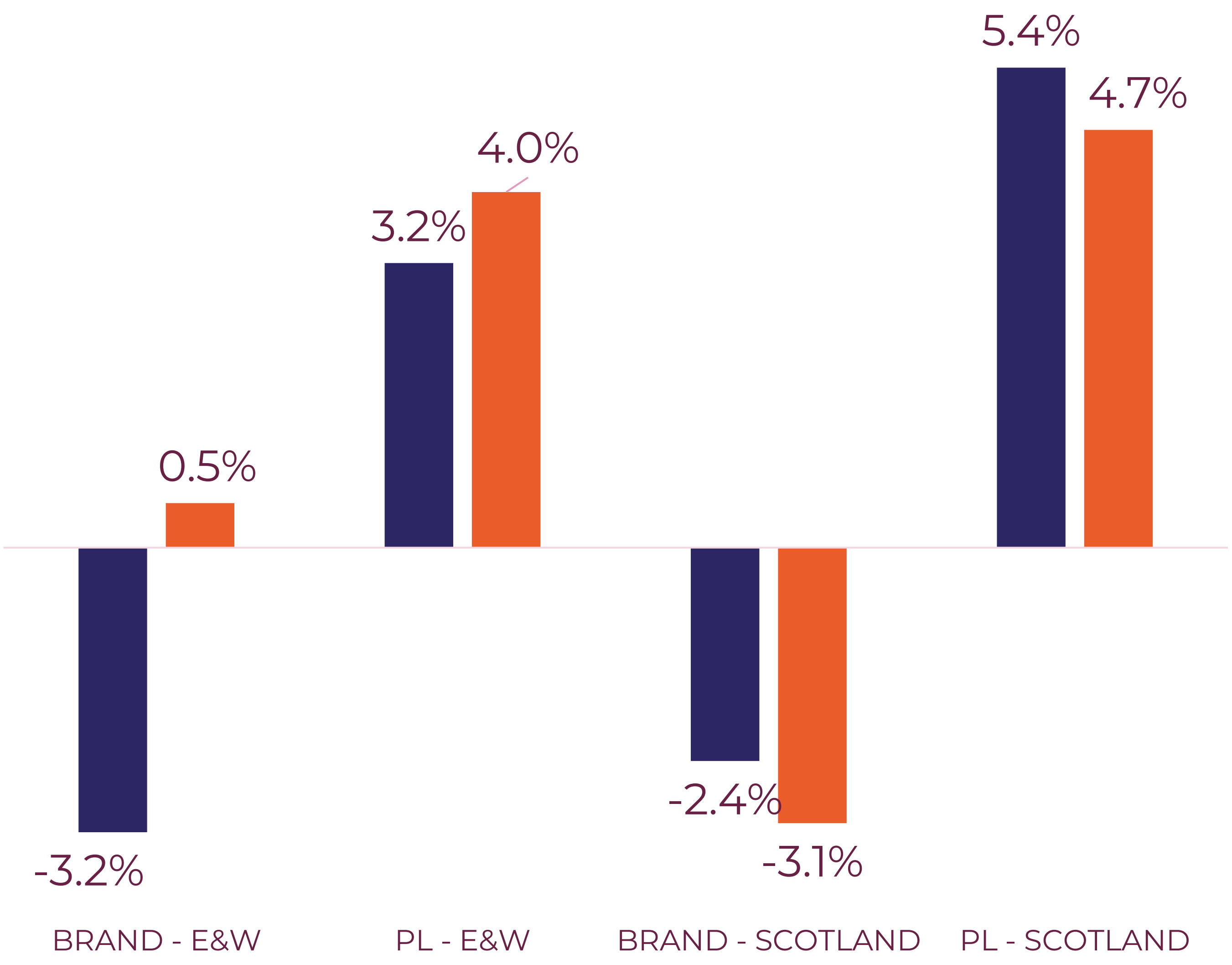
Private Label maintains the majority share at GB level, which is capturing a greater share of sales. Despite this, brands still account for almost 50% of sales in Scotland, roughly 2.5x the share of England & Wales.

Private Label consistently offers larger packs, giving shoppers the opportunity to buy into better value propositions, which has helped performance.

**Total Sausages Value Breakdown by Brand vs Private Label (£m)**




**Total Sausages Brand vs Private Label Year-on-Year Change (%) by Value (£), Volume (KG)**



THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

# Venison

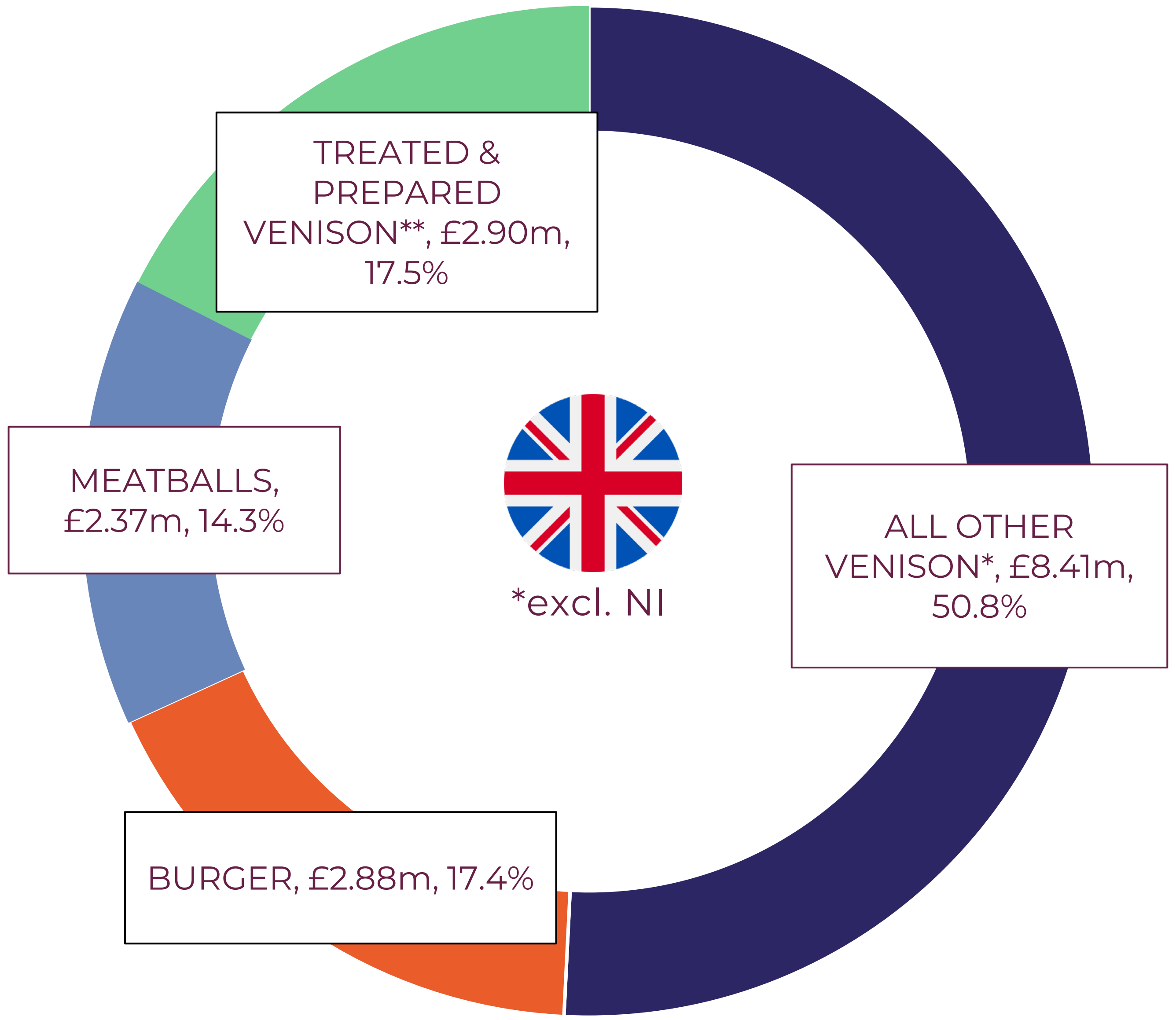
(incl. Treated & Prepared Venison)

Venison has come under significant pressure, only growing slightly in value and in double-digit volume decline, mainly through Burgers & value-added products.

All Other Venison, the largest sub-category, which typically includes Mince & Steaks, has provided an element of resilience with lower volume losses, but is still in decline.

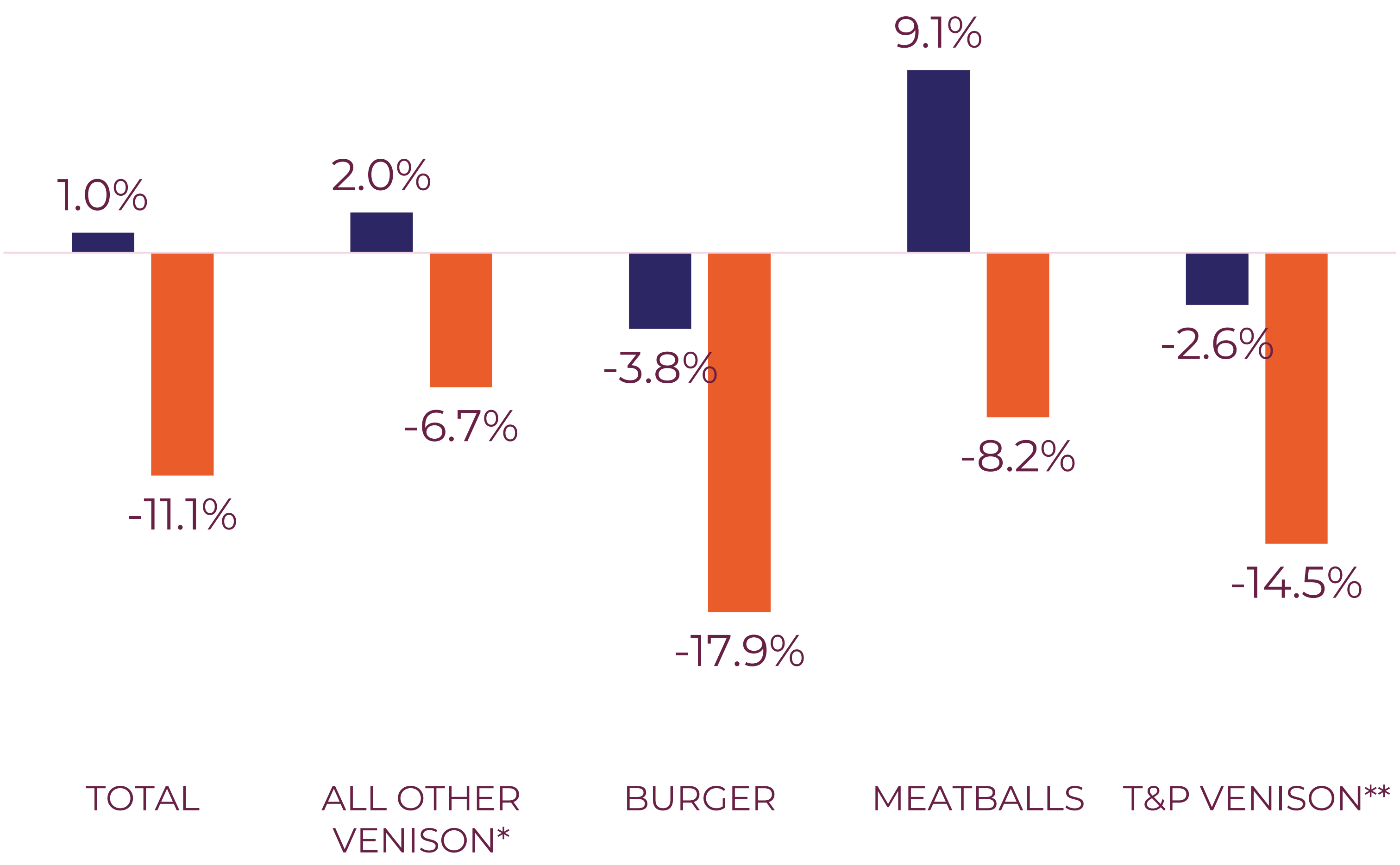
Meatballs sees the highest level of inflation, with 9% value growth and 8% volume decline.

**Total GB Venison Market Value Breakdown by Sub-category (£m)***




**Total Market Value: £16.56m**

**Total GB Venison Year-on-Year Change (%) by Value (£), Volume (KG)**

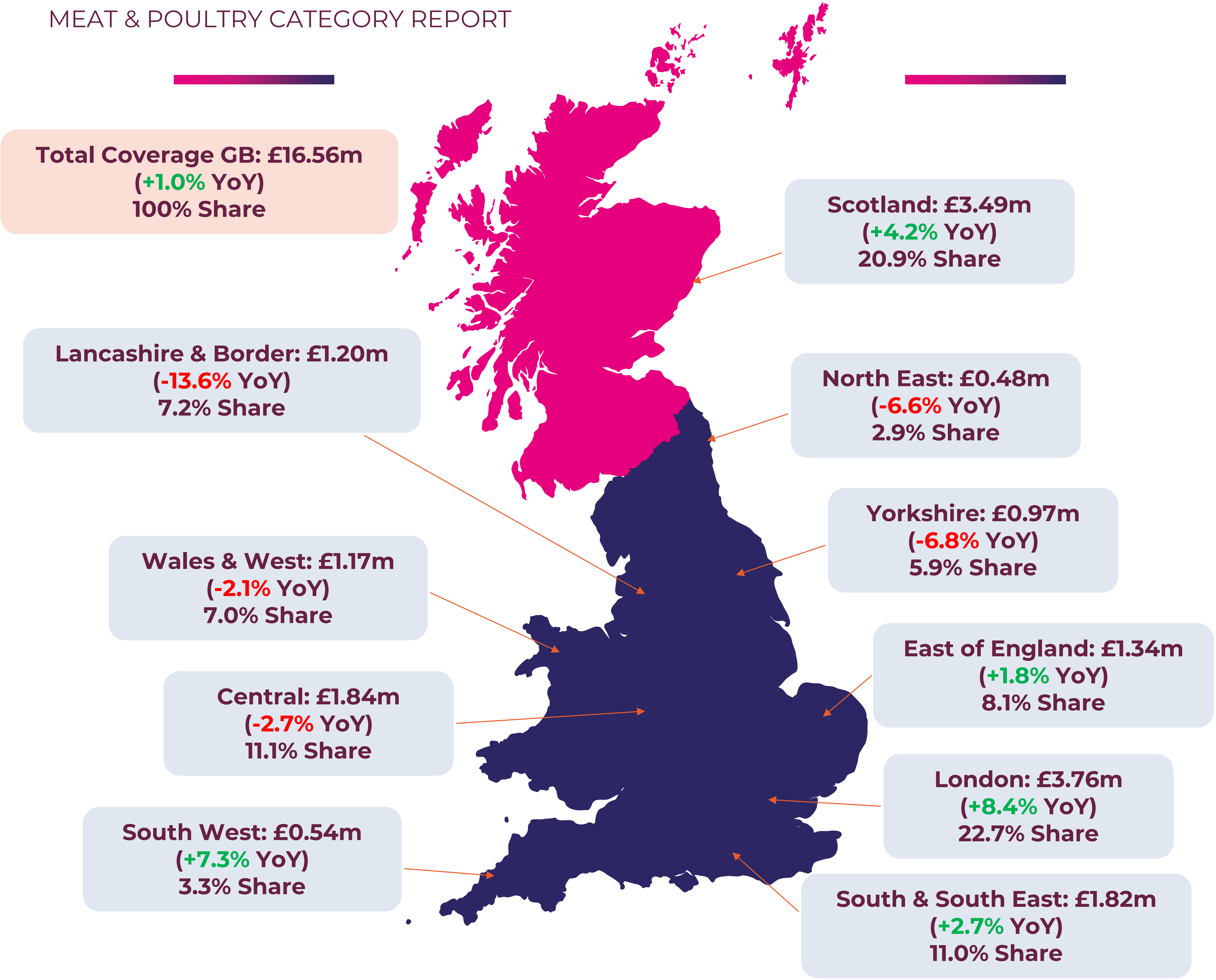





Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026 *Mince, Steaks, & Unspecified PL lines **Grillsteaks, Value added seasoned lines, etc.

MEAT & POULTRY CATEGORY REPORT

## Total Venison Market Value Breakdown by Region (£m)




THE KNOWLEDGE BANK
Turning insight into action

Despite the GB category being under pressure, Scotland is performing better with 4x the value growth and increasing value share beyond the 20% mark.

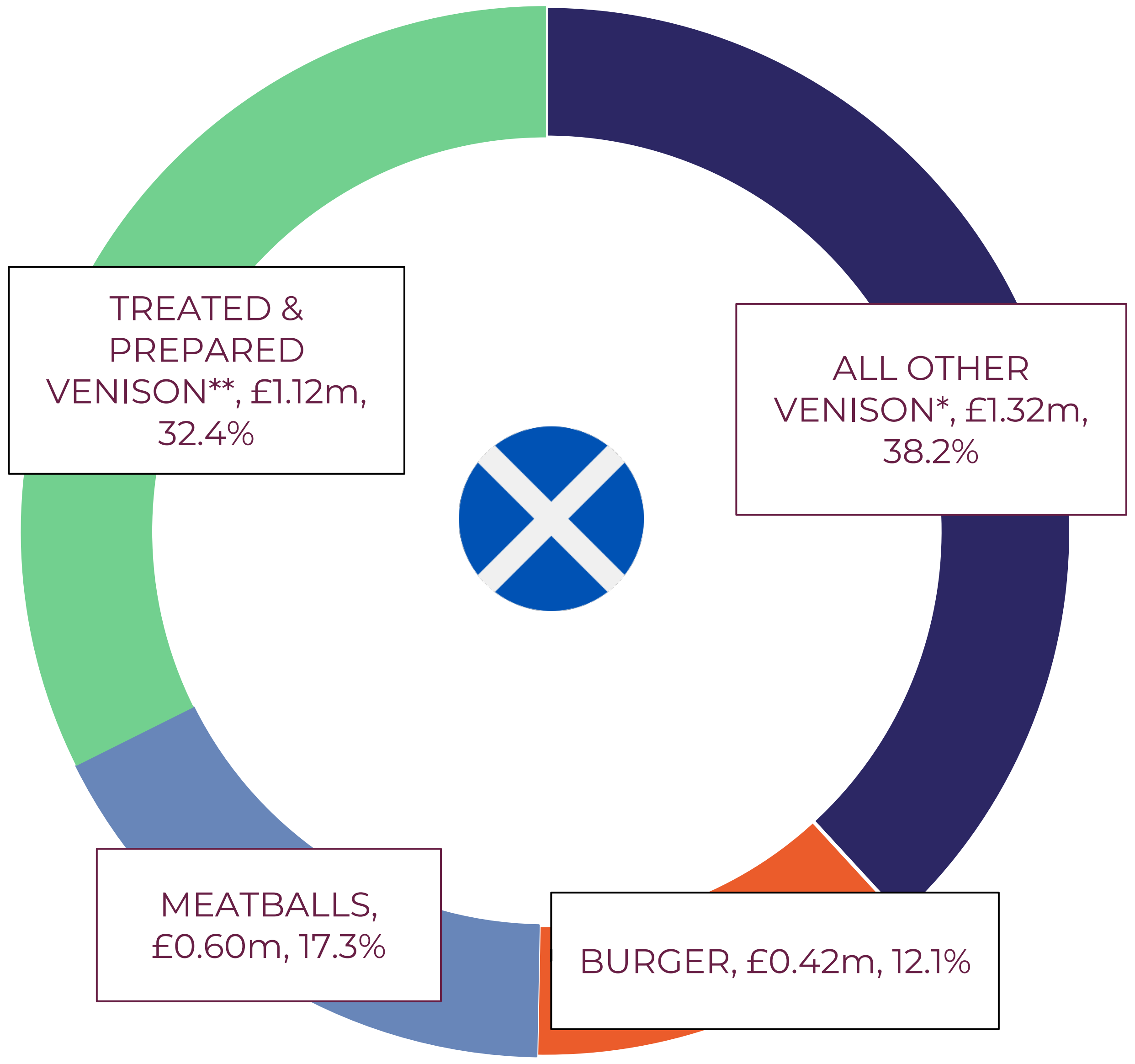
Northern England regions, have contributed to most of the decline, while more affluent southern regions have seen performance & shares grow.

Source: Nielsen Total Coverage GB – 52w/e 24 January 2026

Venison in Scotland has grown to almost £3.5m in value but has experienced similar struggles in volume performance to the wider UK market, driven by Treated & Prepared products which have a greater share of sales in Scotland.

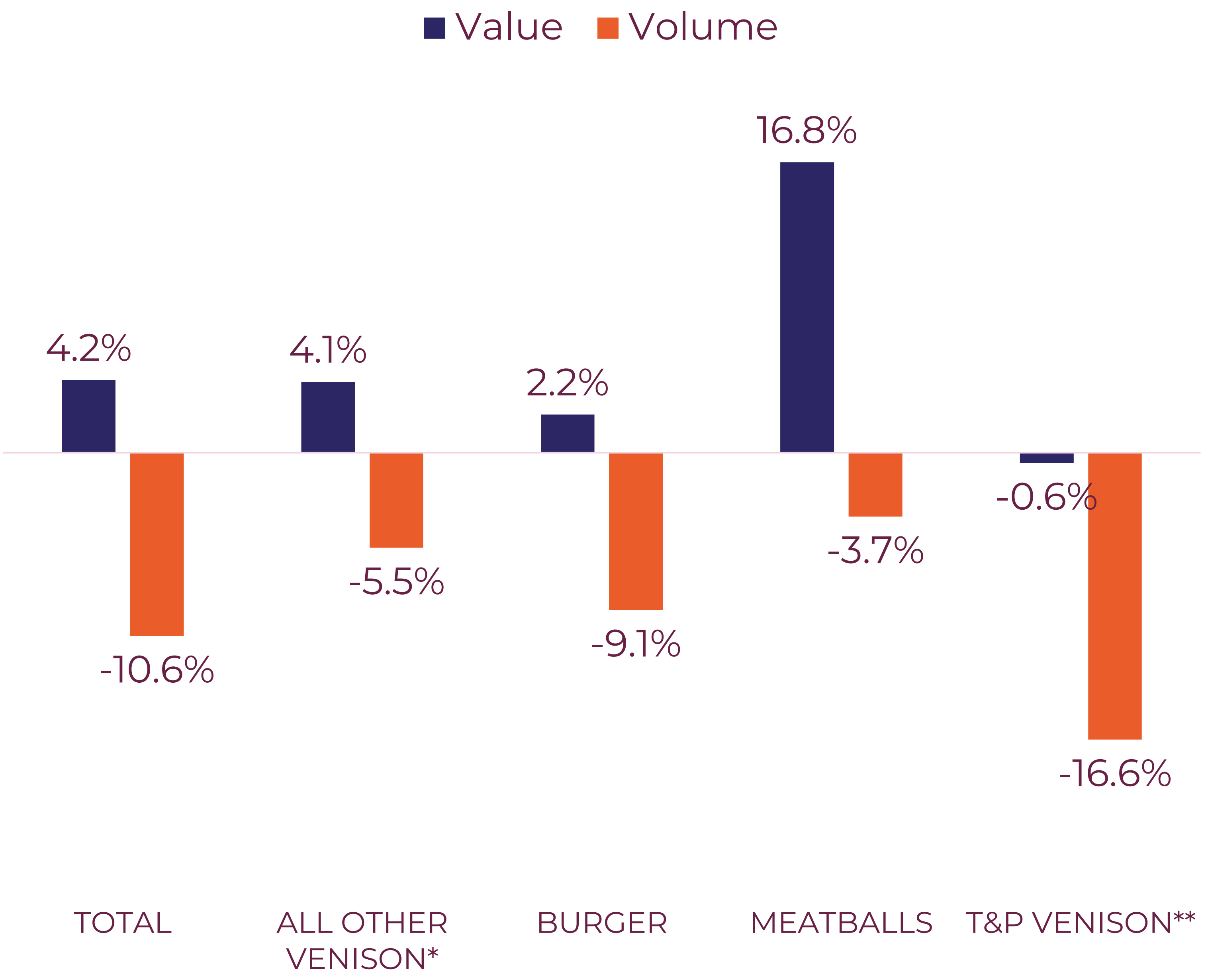
Both Meatballs and Burgers have performed slightly better in the Scottish market.

**Total Scotland Venison Market Value Breakdown by Sub-category (£m)***




**Total Market Value: £3.46m**

**Total Scotland Venison Year-on-Year Change (%) by Value (£), Volume (KG)**






Source: Nielsen Total Coverage Scotland – 52 w/e 24 January 2026 *Mince, Steaks, & Unspecified PL lines **Grillsteaks, Value added seasoned lines, etc.

**NOTE:** Figures represent Grocery Multiples channel (not Total Coverage – see source) as it is the only channel where the Promotion Effect measure can be calculated. As such, value sales figures differ slightly

THE KNOWLEDGE BANK

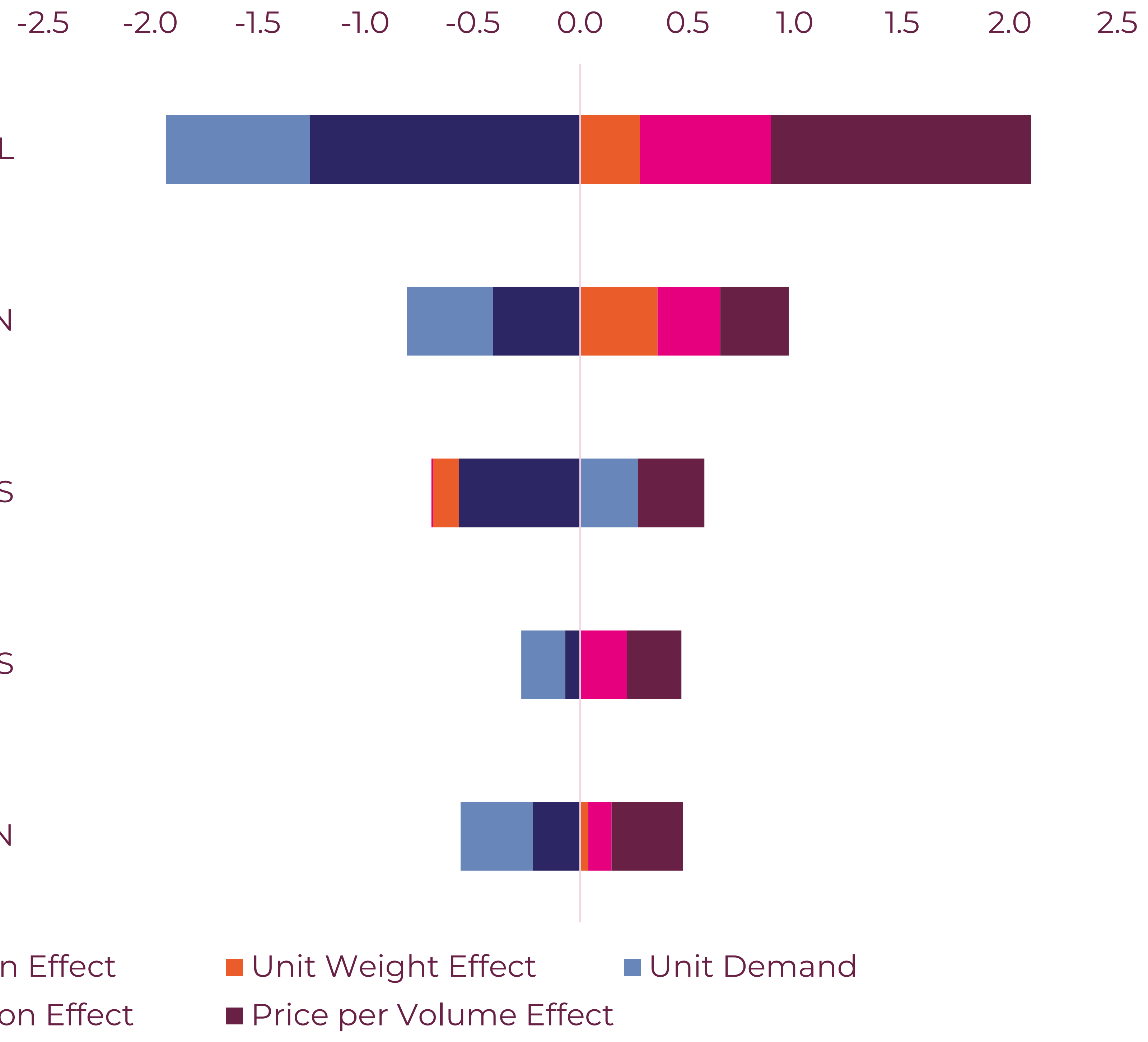
As seen in Beef & Lamb, volume pricing has been a key driver of value growth, though it hasn't necessarily been solely inflationary driven, as there has also been a significant reduction in promotional activity.

As a result, demand has fallen across most segments, while only Burgers saw a slight increase in URoS YoY.

There has been some distributional growth over the year mainly driven by steak and mince products in All Others.

## Total Venison Market Breakdown by Value Drivers (£m)

| £m |  | Change (£m) vs YA |
|---|---|---|
| £16.56 | TOTAL | +0.17 |
| £8.41 | ALL OTHER VENISON | +0.17 |
| £2.88 | BURGERS | -0.11 |
| £2.37 | MEATBALLS | +0.20 |
| £2.90 | T&P VENISON | -0.08 |






Source: Nielsen Grocery Multiples GB – 52 w/e 24 January 2026

Except for Burgers, volume pricing has increased more in Scotland than at GB level. Meatballs increased the most, up over 20% per kilogram vs last year, while Mince & Steaks within the All Other segment saw the lowest growth, but still grew way above the rate of food & drink inflation.

## Total Venison: Value Breakdown by Top Price per Kilogram (£)


| | TOTAL | ALL OTHER VENISON | BURGERS | MEATBALLS | T&P VENISON |
|---|---|---|---|---|---|
| **GB Change vs YA (%)** | +13.7% | +9.3% | +17.2% | +18.8% | +13.9% |
| **Scotland Change vs YA (%)** | +16.6% | +10.1% | +12.4% | +21.3% | +19.3% |

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026

THE KNOWLEDGE BANK
Turning insight into action

## Total Venison Promotional Activity: GB

**Key**

**Promo Sales (%)**
Promo Sales (£)
(YoY £ growth)

**Total** *excl. NI
**27.5%**
£4.56m
(-21.6% YoY)

**All Other Venison**
**26.8%**
£2.26m
(-15.2% YoY)

**Burgers**
**32.3%**
£0.93m
(-37.7% YoY)

**Meatballs**
**28.4%**
£0.67m
(-9.2% YoY)

**T&P Venison**
**23.9%**
£0.69m
(-24.0% YoY)

Promo activity, as mentioned, reduced drastically YoY, down more than £1m overall which will have undermined growth.

All sub-categories declined, though Burgers contributed the largest decline overall.

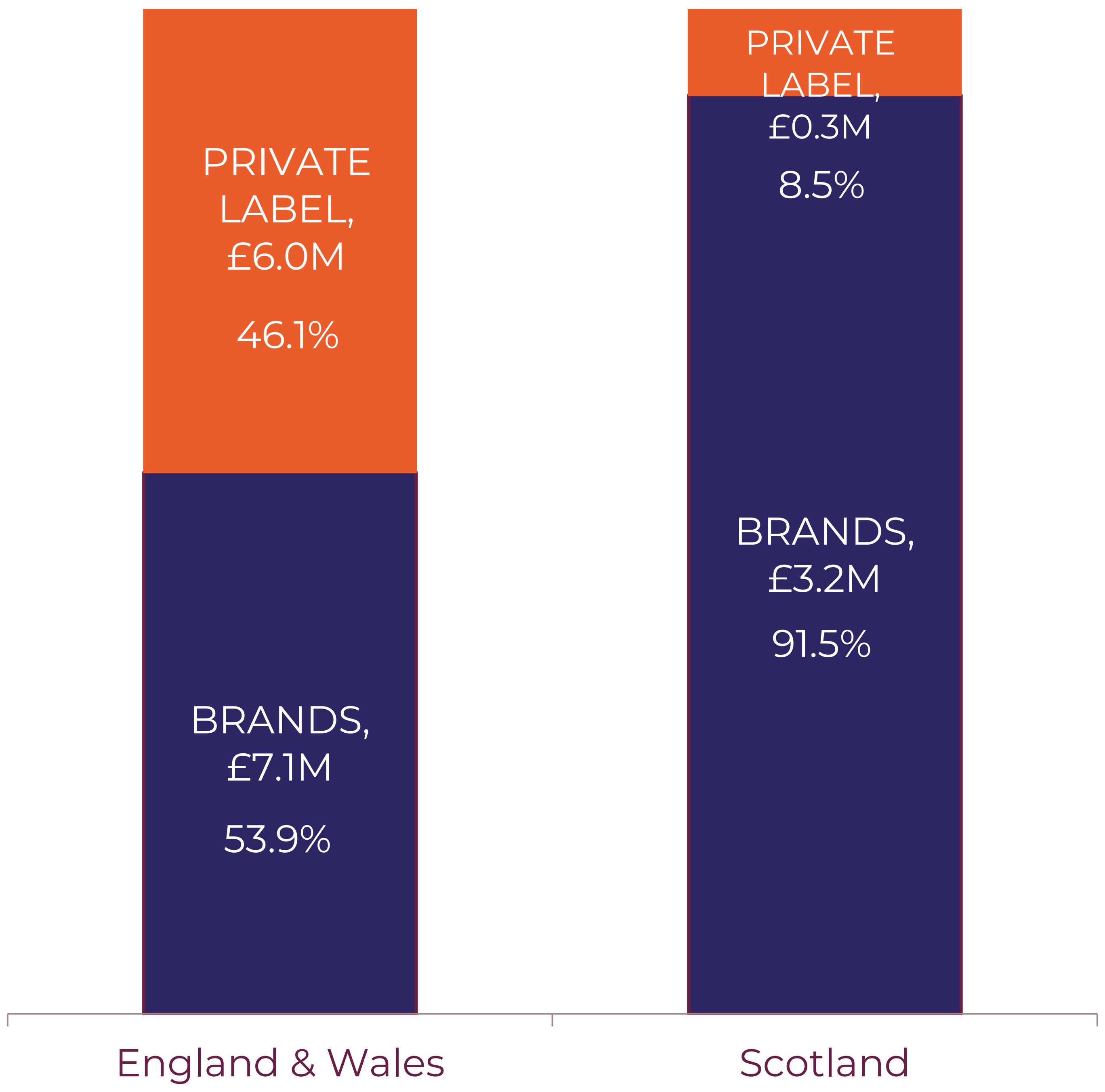
Promo sales are now at a similar level to where they were at a couple of years ago, only the category's total valuation is up well over 20% in that time, suggesting the market has become a lot more expensive.

Source: Nielsen Total Grocery Multiples GB – 52 w/e 24 January 2026

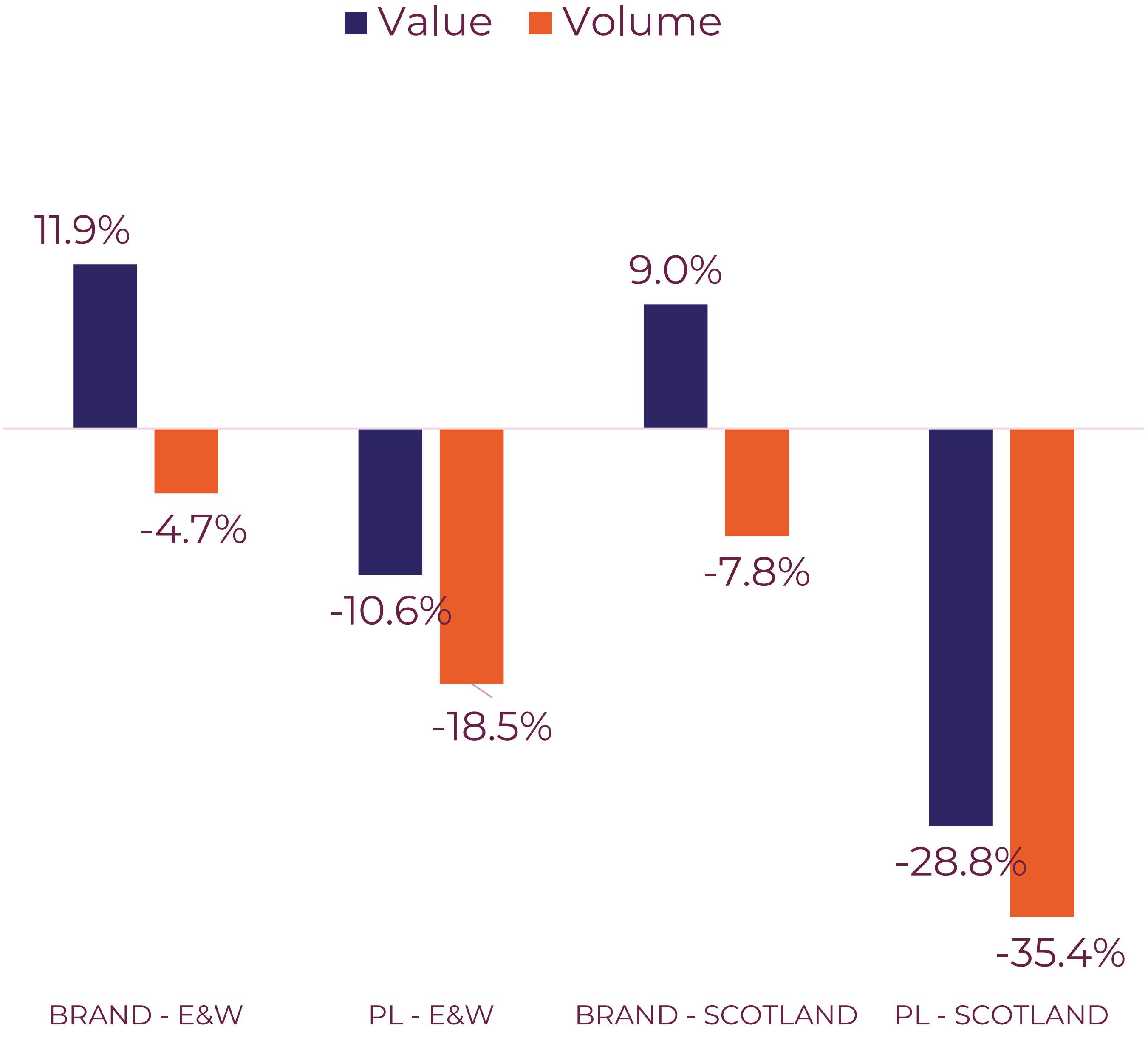
While Brands hold a strong share, Private Label has a 5.5x higher share in England & Wales than in Scotland. That said, Private Label share is falling quickly, as value and volume are in double digit decline across the market, particularly bad in Scotland.

Branded share in Scotland at over 90% is mostly driven by Highland Game participation within the Meatballs, Grillsteaks & Burgers area of the category.

**Total Venison Value Breakdown by Brand vs Private Label (£m)**




**Total Venison Brand vs Private Label Year-on-Year Change (%) by Value (£), Volume (KG)**






Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

# Fresh Poultry

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

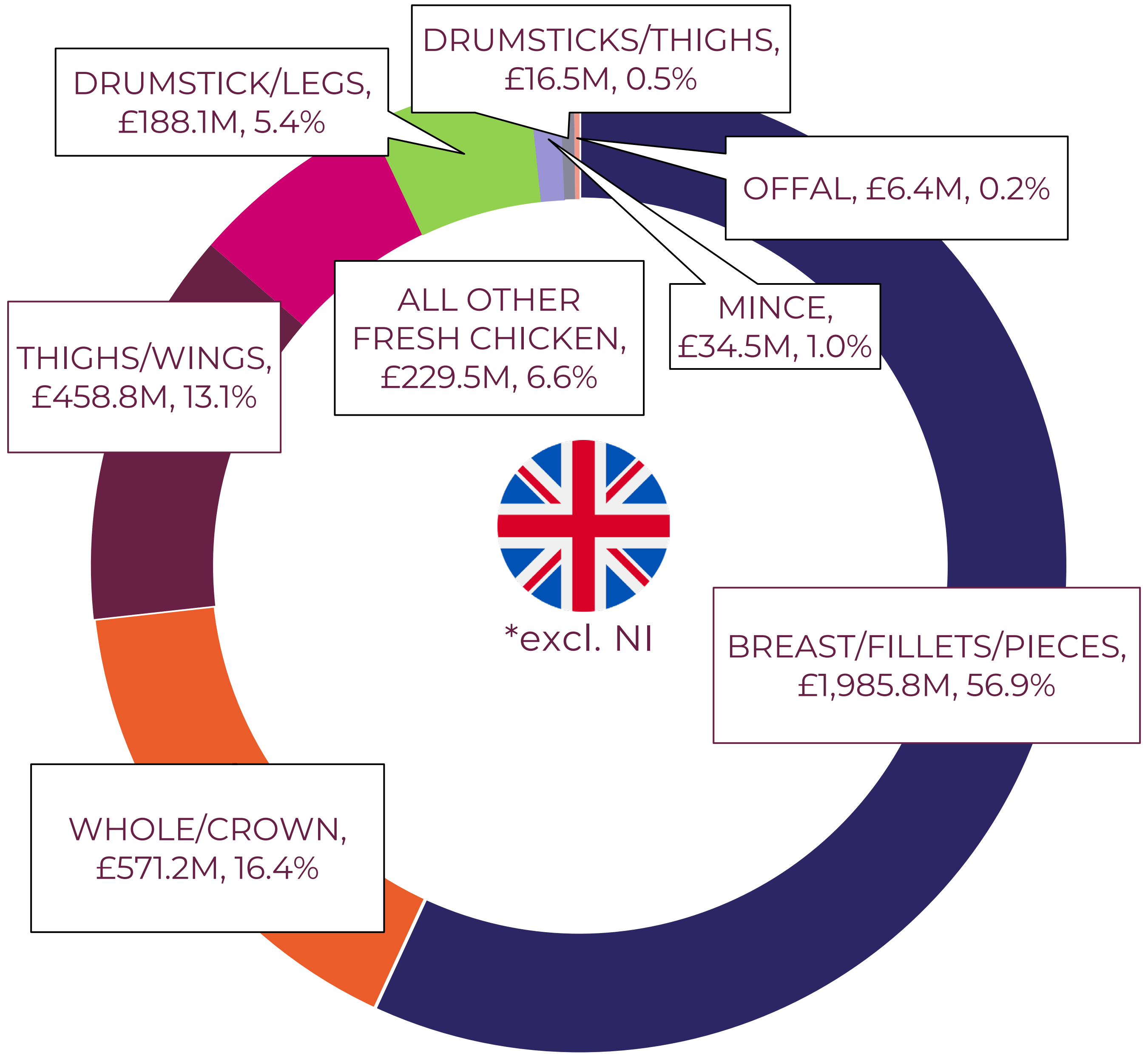
# Chicken

Chicken sales have quickly closed in on a £3.5bn valuation in GB retail, growing strongly in value but falling slightly YoY from a volume perspective.

Breast & Fillets, the largest sector, has provided significant growth to the category and has not experienced volume decline.

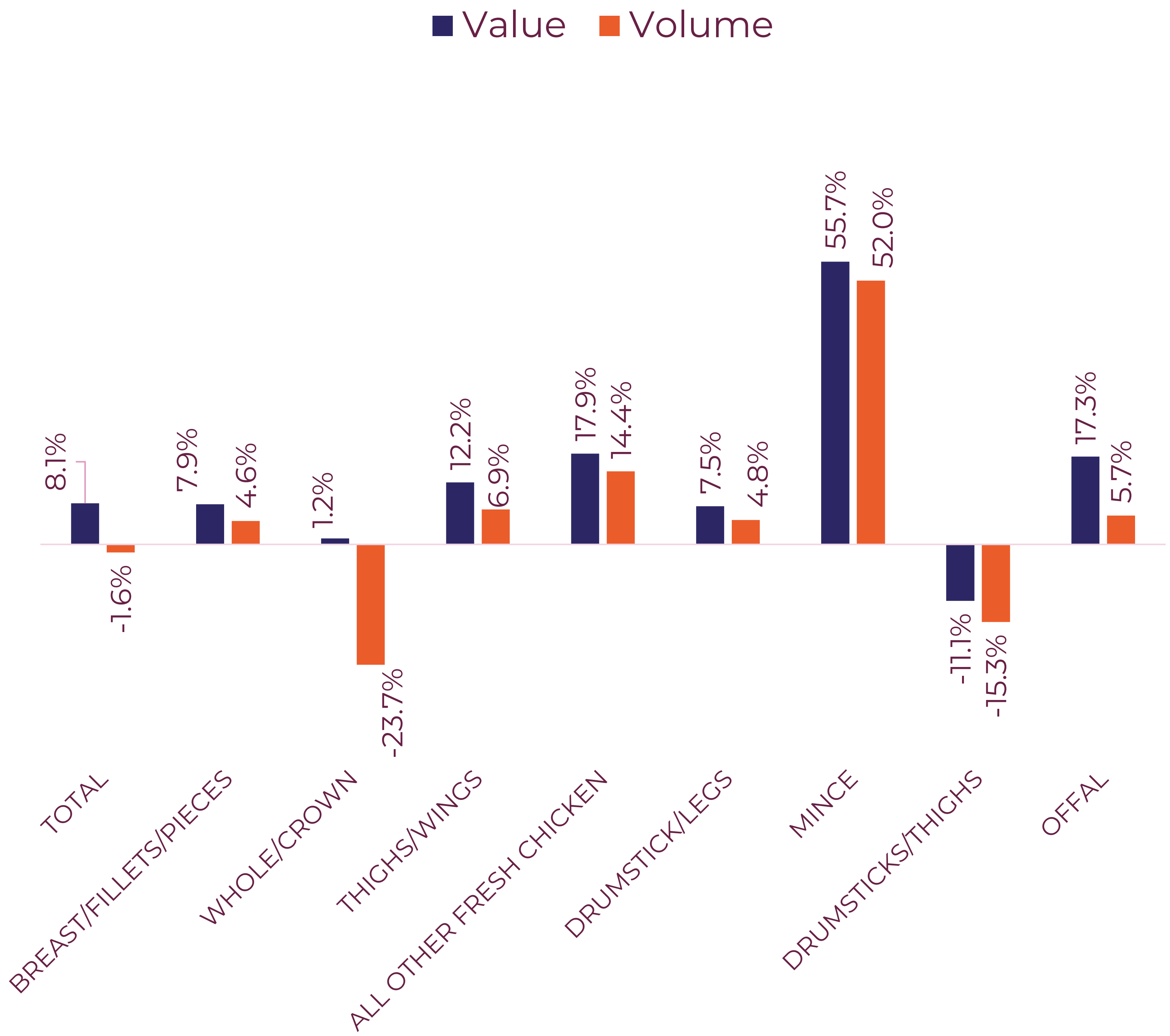
Whole/Crown Chicken has been the single largest contributor to volume decline, where volume sales fell by almost a quarter YoY.

**Total GB Chicken Market Value Breakdown by Sub-category (£m)***




**Total Market Value: £3.49bn**

**Total GB Chicken Year-on-Year Change (%) by Value (£), Volume (KG)**



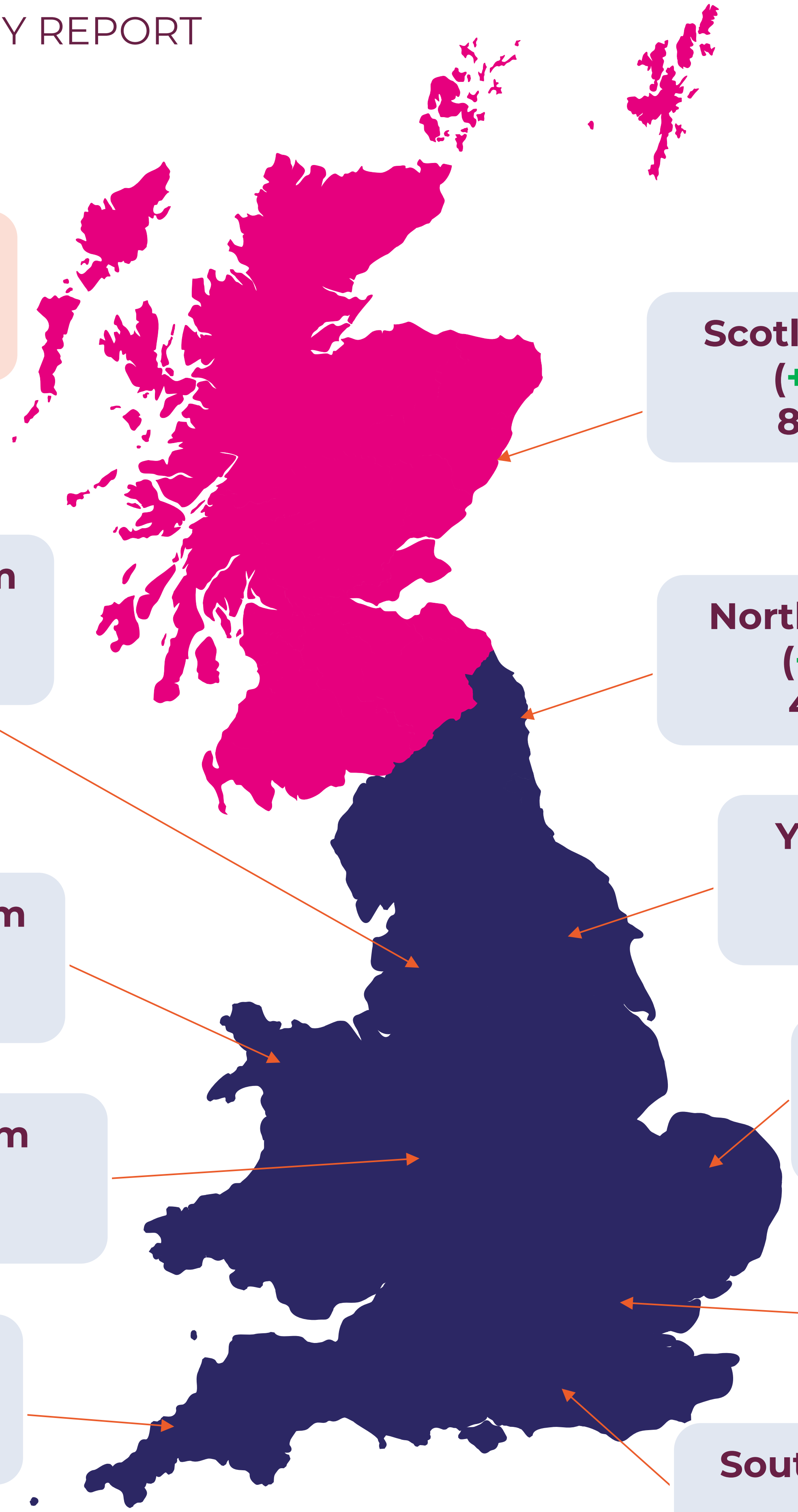



Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026 *Largely Private Label lines with no segmentation yet

MEAT & POULTRY CATEGORY REPORT

## Total Chicken Market Value Breakdown by Region (£m)

THE KNOWLEDGE BANK
Turning insight into action



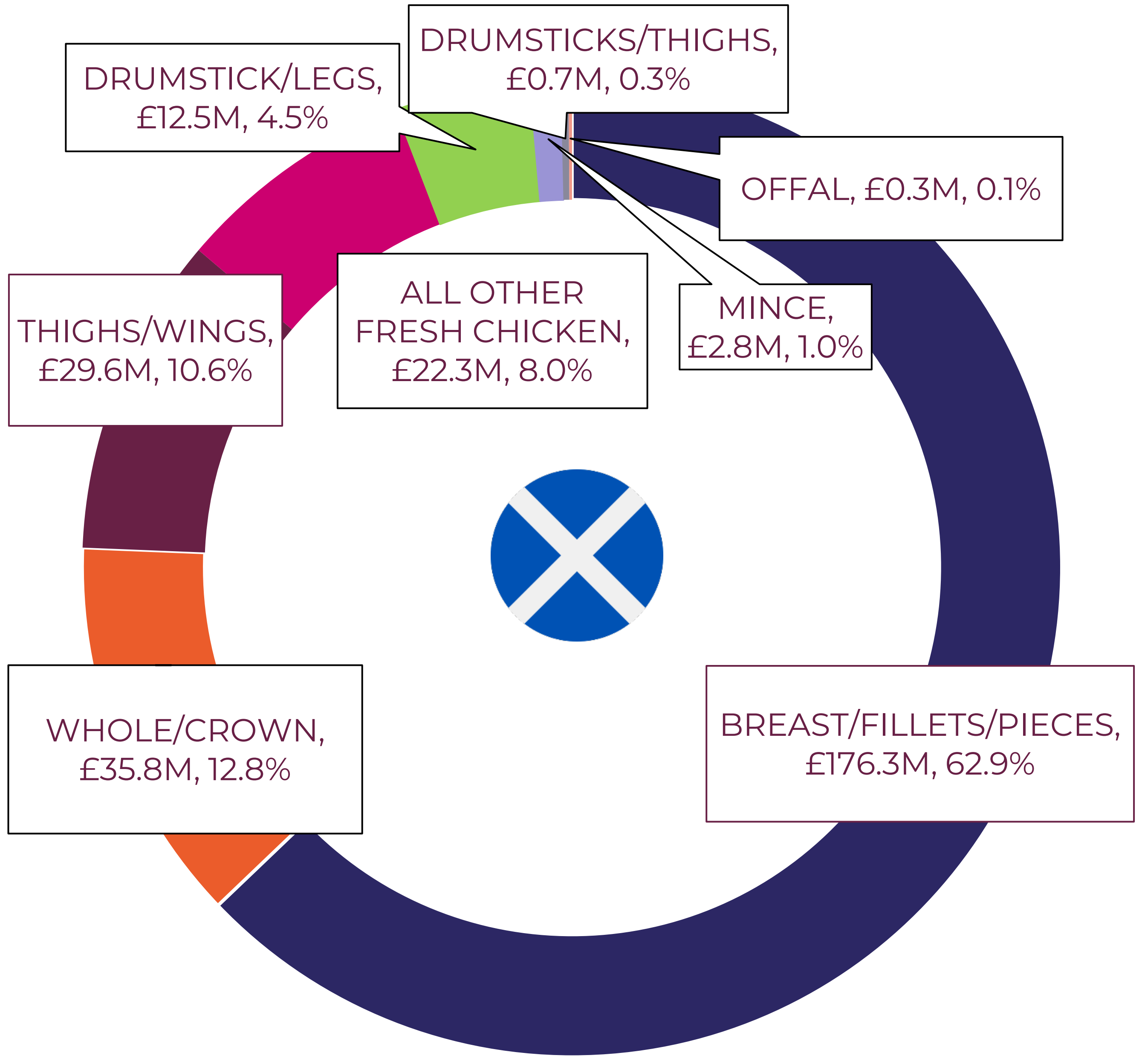

Scotland holds an 8% share of the Chicken market, in line with previous reporting, and performing almost identically with GB. In fact, performance across all regions has been very similar from a value perspective, with little movement in terms of share across the country.

Source: Nielsen Total Coverage GB – 52w/e 24 January 2026

In Scotland, performance across the sub-categories echoed that of GB.

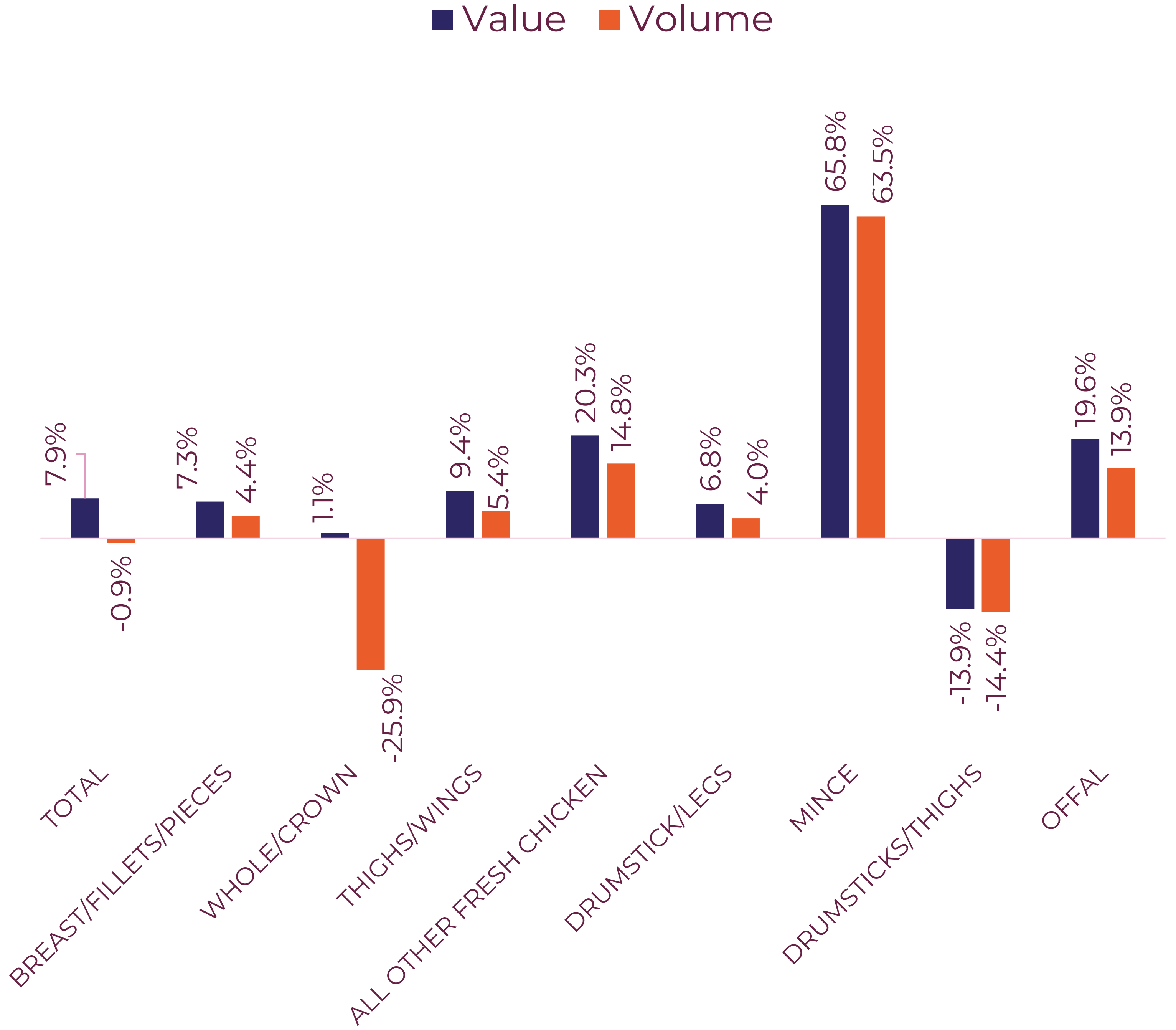
Breast & Fillers proved very important to overall category performance, where share is even higher in Scotland, accounting for more than £3 of every £5 spent on the category.

## Total Scotland Chicken Market Value Breakdown by Sub-category (£m)*




**Total Market Value: £280.4m**

## Total Scotland Chicken Year-on-Year Change (%) by Value (£), Volume (KG)






Source: Nielsen Total Coverage Scotland – 52 w/e 24 January 2026 *Largely Private Label lines with no segmentation yet

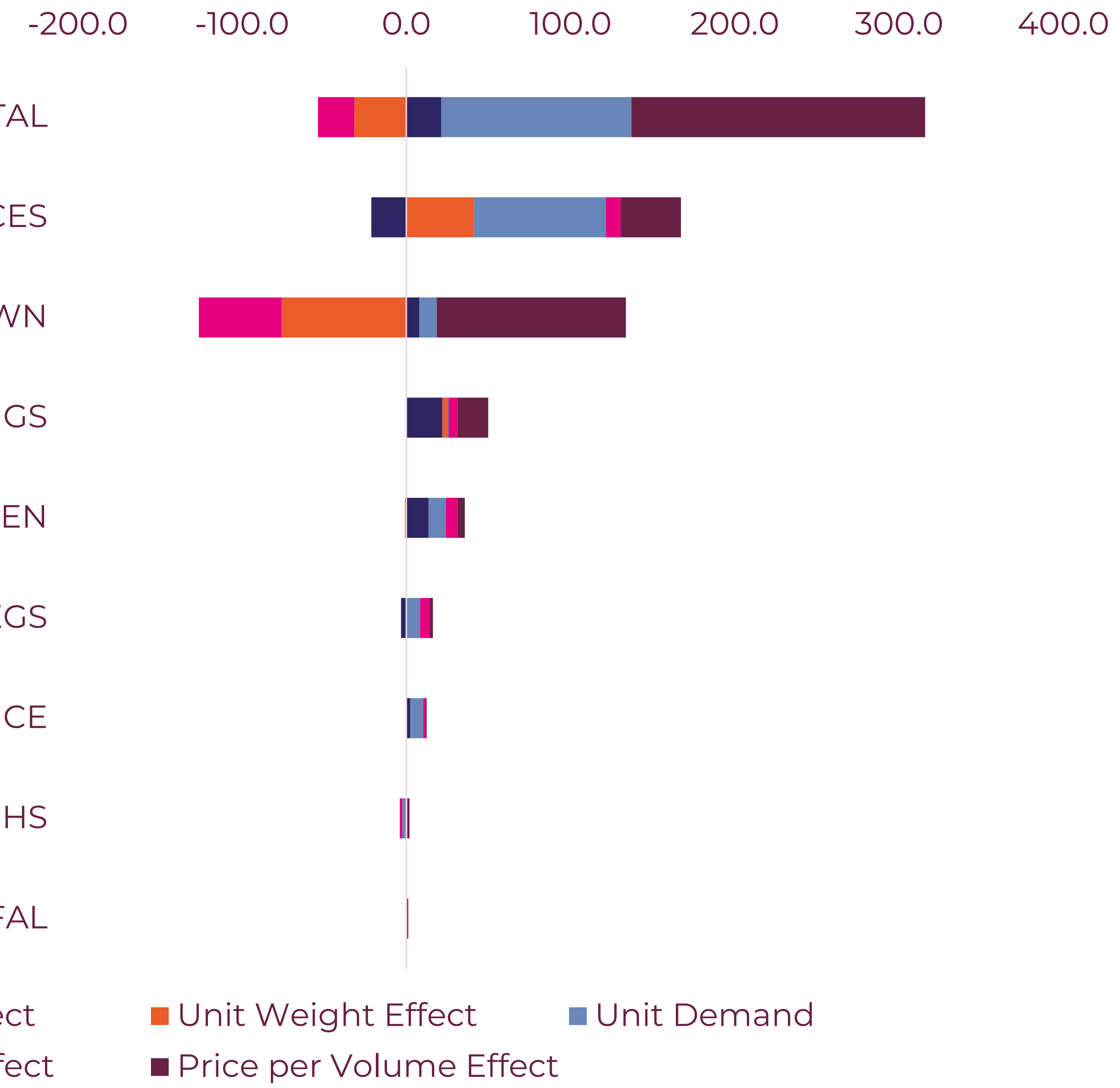
**NOTE:** Figures represent Grocery Multiples channel (not Total Coverage – see source) as it is the only channel where the Promotion Effect measure can be calculated. As such, value sales figures differ slightly

Interestingly, demand for Chicken rose over the year, growing across all segments somewhat proportionally suggesting there may have been some switching activity among shoppers who moved away from the likes of Beef & Lamb because of soaring prices.

Volume pricing did however continue to grow for Chicken, as it wasn't immune to increases, while falling unit weights, particularly in the Whole/Crown sub-category suggests some shoppers bought smaller products.

## Total Chicken Market Breakdown by Value Drivers (£m)

| | £m | Change (£m) vs YA |
|---|---|---|
| TOTAL | £3,461.2 | +261.4 |
| BREAST / FILLETS / PIECES | £1,970.0 | +145.8 |
| WHOLE / CROWN | £567.3 | +6.9 |
| THIGHS/WINGS | £454.8 | +49.9 |
| ALL OTHER FRESH CHICKEN | £225.3 | +34.6 |
| DRUMSTICKS / LEGS | £186.4 | +13.1 |
| MINCE | £34.5 | +12.3 |
| DRUMSTICKS / THIGHS | £16.5 | -2.0 |
| OFFAL | £6.4 | +0.9 |






Source: Nielsen Grocery Multiples GB – 52 w/e 24 January 2026

Chicken is roughly 7% higher in Scotland than at GB level, most of which coming from mid-valued sub-categories..

Volume pricing grew by 9-10% across both channels (lower in Scotland), though this was driven almost exclusively by shoppers in the Whole/Crown segment where prices rose more so than any other Fresh Meat & Poultry sub-category seen.

Compared to Nov ‘23, the earliest period of last year’s report, Breast & Fillets volume pricing is up between 3-4% at GB level – very minimal.

Source: Nielsen Total Coverage GB – 52 w/e 24 January 2026



## Total Chicken: Value Breakdown by Top Price per Kilogram (£)


| | TOTAL | BREAST / FILLETS | WHOLE / CROWN | THIGHS / WINGS | ALL OTHER CHICKEN | DRUMSTICK / LEGS | MINCE | DRUMSTICKS / THIGHS | OFFAL |
|---|---|---|---|---|---|---|---|---|---|
| **GB Change vs YA (%)** | +9.8% | +3.2% | +32.6% | +5.0% | +3.1% | +2.6% | +2.4% | +4.9% | +11.0% |
| **Scotland Change vs YA (%)** | +8.9% | +2.7% | +36.5% | +3.8% | +4.8% | +2.6% | +1.4% | +0.5% | +5.1% |

THE KNOWLEDGE BANK
Turning insight into action

Key

**Promo Sales (%)**
Promo Sales (£)
(YoY £ growth)

## Total Chicken Promotional Activity: GB

**Total**
*excl. NI

**19.5%**
£673.3m
(+3.2% YoY)

**Breast/Fillet**
**17.4%**
£342.1m
(-5.9% YoY)

**Thighs/Wings**
**15.0%**
£68.2m
(+47.2% YoY)

**Mince**
**16.9%**
£5.8m
(+77.6% YoY)

**Offal**
**14.2%**
£0.9m
(-8.1% YoY)

**Whole/Crown**
**25.8%**
£146.1m
(+5.8% YoY)

**Drumstick/Legs**
**19.6%**
£36.5m
(-8.1% YoY)

**Drumstick/Thighs**
**25.0%**
£4.1m
(-7.4% YoY)

**All Other Fresh Chicken**
**30.9%**
£69.5m
(+24.3% YoY)

Following previous reporting's 33% increase in promo activity, growth YoY this time round has been much more stable at topline level, but has varied significantly by sub-category.

Thighs/Wings, Mince and All Other Fresh Chicken are examples of categories which have significantly increased promo investment which has contributed to strong overall growth in sales in these segments.

Source: Nielsen Total Grocery Multiples GB – 52 w/e 24 January 2026

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

# So, what does this mean for producers?

# MEAT & POULTRY CATEGORY

THE KNOWLEDGE BANK

| Insight | | Action |
|---|---|---|
| Supply Chain issues resulting in soaring prices have caused some shoppers to turn away from the sector over the past year, particularly in categories such as Beef. | → | As prices increases it will be important to reinvest in Promo activity to help soften the blow and ensure fewer shoppers exit or reduce spend in the category. |
| Despite rising prices there is still a focus on quality NPD such as premiumisation, brand collaborations and occasion innovation. | → | There is still opportunity for products that can add value to consumers lives such as offering cost-effective alternatives to eating out. |
| Rising prices have placed pressure on shopper budgets which has led to cutting back spend or focusing on cheaper cuts/proteins. | → | There is opportunity for producers to restore the perception of value through "Value Packs" or adding or utilising cheaper cuts within ranges to help shoppers get more for their money. |
| Health has become an important consumer behaviour driver within food due to the emerging use of GLP-1s, a greater focus on Nutrient Dense foods and growing concerns around UPFs. | → | There's opportunity to improve industry communications around the nutrient density of meats. Introduce "Front-of-Pack" call-outs that highlight meat as a natural superfood rich in Iron, B12, Protein, etc. & develop healthier and/or less processed products. |
| Provenance has increased in importance over the past couple of years in Scotland, while public trust in farming has reached an all-time high across GB. Scottish produce continues to have quality connotations across different food and drink categories. | → | Whilst demand is still strong for Scottish produce in Scotland, there is an opportunity to push Scottish meat & poultry products in more affluent regions like London which have been more resilient to volume decline. |

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

# Bibliography

# Bibliography


Nielsen Data w/e 24th January 2026

Agriland Press Release, 2026

AHDB Press Releases, 2025 & 2026

Worldpanel, 2025

Levercliff Tracker Survey, Edition 17, 2025

NNB July 2025 Newsletter

Office for National Statistics, 2026

Optimising Nutrition Press Release, 2023

Provenance Research, July 2025, 56 Degree Insight for the Knowledge Bank

Sky News, October 2025

The Food People, 'Meat & Poultry Snapshot', 2025

The Grocer, 2025

Other Publications:

Beef market outlook | AHDB

Consumer positivity towards British agriculture hits new high in 2025 | AHDB

Finnebrogue unveils Guinness bacon and sausage SKUs | The Grocer

https://scottishgrocer.co.uk/2026/03/20/simon-howie-rolls-out-high-protein-steak-lorne/

Inflation and price indices - Office for National Statistics

Morrisons goes 'ultra premium' in major fresh relaunch | The Grocer

Only 26% of own-brand products in Scotland are Scottish, finds ShelfWatch | News | Meat Management

Record high £4 billion for UK dairy and red meat exports - Agriland.co.uk

Rising demand for livestock feed drives compound feed market growth | AHDB

Shrinking herds and rising costs: The beef market is in turmoil - and inflation is spiralling | Money News | Sky News

Unlock Nutrient Density for a Healthier You: A Comprehensive Guide - Optimising Nutrition

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

# Appendix

MEAT & POULTRY CATEGORY REPORT

# NEW!!

# Glossary of Terminology

THE KNOWLEDGE BANK

Good news from The Knowledge Bank!!

We have added a Glossary as supplementary material to your Knowledge Bank experience.

It provides a comprehensive view on terminology that frequently appears in our category reports.

Now you can check back throughout the report to clarify any terms that you come across to help digest the information so that you can really know what's going on in the category.

*IMPORTANT*

You must be logged in to The Knowledge Bank to access.

If you have any questions, please email info@theknowledgebank.scot

Click Here for a comprehensive view of terminology!!

# Nielsen Universe Updates August 2024

THE KNOWLEDGE BANK

As of August 2024, Nielsen has expanded its market data reach by attaining full EPOS data provision from both Aldi & Lidl. As a result, both retailers have been moved into the Grocery Multiples channel, along with some additional smaller stores.

This Discounter channel has been discontinued as of August 19th.

Below is the new Trade Channel universe going forward. For further information, please contact info@theknowledgebank.scot

**Food, Confectionery, Soft Drinks ~ Trade Channel Universe Information**

| TOTAL COVERAGE | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| GROCERY MULTIPLES | | TOTAL IMPULSE | | | | | | |
| GROCERY MULTIPLES | | MULTIPLE IMPULSE | | | | | | INDEPENDENTS |
| Grocery Multiples | | Multiple Forecourts | | Convenience Multiples | | Symbol Groups | | Independents |
| Asda (inc Asda Express) | Census \| KAD | Applegreen (formerly Petrogas Group) | Universe | Amathus | Universe | Budgens | Sample\|KAD | Sample |
| EH Booth | Census | Ascona (formally Cornwall Garage Group | Universe | Bargain Booze | Census \| KAD | Booker Premier | Sample | |
| Iceland | Census \| KAD | BP | Census \| KAD | Boots | Census \| KAD* | Costcutter | Sample\|KAD | |
| M&S | Census | Certas Energy | Universe | Everydayz | Universe | Londis | Sample | |
| Ocado | Census \| KAD | Eurogarage | Universe | G101 Off Sales | Universe | Spar | Sample | |
| Sainsburys | Census \| KAD | Harvest (formerly State Oil Group) | Universe | JCR (Select Convenience) | Universe | Best-One | Sample | |
| Tesco | Census \| KAD | Motor Fuel Group | Census \| KAD | T&S/One Stop | Census \| KAD | Central Convenience Stores | Sample | |
| Waitrose | Census \| KAD | NTS Group | Universe | WHS High Street | Census \| KAD | Filshill Keystores | | |
| WM Morrison (Inc Morrisons Daily) | Census \| KAD | Park Garage Group | Universe | WHS Travel | Census \| KAD | Go Local (Parfetts) | | |
| Aldi | Census | Penny Petroleum | Universe | Jeroboams | Universe | Mace | | |
| Lidl | Census | Platinum Retail | Universe | Laithwaites Wine | Universe | Nisa | | |
| Poundland | Census | Pricewatch Local Fuels 12 | Universe | Majestic Wine | Census | Select & Save | | |
| Farmfoods | Universe | Rontec | Universe | Margiotta | Universe | Simply Fresh | | |
| Amazon Fresh Brick & Mortar | Census | Sewell Retail | Universe | Superdrug | Census \| KAD | Unitas (Today's, Day Today, Lifestyle Express) | | |
| Amazon Fresh & Core 1st Party Online | Census | SGN | Universe | Wilkinsons (closed W 2024 40) | Census \| KAD | | | |
| Allendale Co-op | Universe | Shell | Census \| KAD | The Whisky Shop | Universe | | | |
| Central England Co-op | Census (formerly Universe) | The Kay Group | Universe | | | | | |
| Chelmsford Co-op | Universe | Valli Forecourts | Universe | | | | | |
| Clydebank Co-op | Universe | | | | | | | |
| Coniston Co-op | Universe | | | | | | | |
| The Co-operative Group | Census \| KAD | | | | | | | |
| East of England Co-op | Universe | | | | | | | |
| Grosmont Co-op | Universe | | | | | | | |
| Heart of England Co-op | Universe | | | | | | | |
| Lakes & Dales | Universe | | | | | | | |
| Langdale Co-op | Universe | | | | | | | |
| Lincolnshire Co-op | Universe | | | | | | | |
| Midcounties Co-op | Census (formerly Universe) | | | | | | | |
| Radstock Co-op | Universe | | | | | | | |
| Scottish Midland Co-op | Universe | | | | | | | |
| Southern Co-op | Universe | | | | | | | |
| Tamworth Co-op | Universe | | | | | | | |

*Boots KAD only available for certain categories. Speak to your Client Ops contact for category availability

Explanation of terms:

Census = We receive data from all stores for these retailers.
Sample = We receive data from a sample of stores for these retailers, and these are used to represent other stores in the universe. Note that in most cases, the sample is not designed to represent the specific retailer that the stores are from.
Universe = We do not receive any data from these retailers. Data from the retailers we do receive is expanded to represent these retailers as a group within each trade channel.
Storewards + CPS = We receive Discounter data through a crowd-sourced audit application known as Storewards. We combine this with our CPS data.

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink Partnership**

# Thank you

If you have any queries about this presentation, please contact:
info@theknowledgebank.scot

Delivered by
SCOTLAND FOOD & DRINK PARTNERSHIP

And supported by
Scottish Government
Riaghaltas na h-Alba
gov.scot

MARCH 2026