

Quality Meat Scotland

Annual Review

2024-2025



Data Snapshot

Brand recognition uplift:

**Scotch Beef GI &
Scotch Lamb GI 84%**

(from 78%)

Specially Selected Pork 53%

(from 35%)

85%

find QMS a great place to work
(2024 culture capture survey)



More than

**6k
people**

in Scotland reached
through community
outreach activities



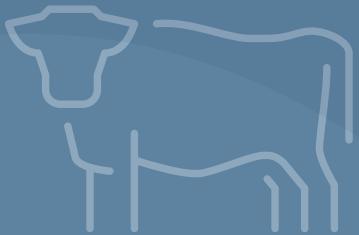
Award-winning Meat
& 2.0 marketing
campaign reached

2.5m adults,
reshaping perceptions
of traditional "meat
and two veg"

Around

90%

of cows and sheep
sold at auction were
quality assured



Supported over
20 community
marketing initiatives
through
£50k fund

Provenance

- Over 75,000 'how to' guides distributed across three key seasons – BBQ, Festive and Healthy Eating
- Development and launch of our new 'When You Know, You Know' integrated campaign that focuses on the Scotch difference. Using TV, press, radio, paid social, PR, sponsorship, influencer activity and digital media, it reached around 80% of adults in Scotland across three phases
- 26k BBQ guides distributed and more than 50k reached via festive and health guides

People

- Four new industry leadership groups established: Beef, Sheep, Pig and Climate and Nature – focussed on sector strategy work and species-specific alignment across the supply chain

Planet & Place

- More than 130 guests attended the parliamentary reception at Holyrood in May 2024
- Meat Voucher Scheme utilised by 100s of schools across Scotland
- QMS podcast achieved 27k downloads and is considered one of the world's 'top beef podcasts' of 2025 (Million Podcasts)

Productivity & Profitability

- 22 beef, lamb and pork farms in Scotland selected to take part in environmental data pilot
- 170 members of Scotch Butchers Club
- Over 100 attendees at Building Better Beef and Lamb Workshops, with 96% saying the event made them more likely to consider changes in their business
- One of the tools we currently have is the AHDB Pig Movement and Handling Training course. More than 330 Scottish pig stock people have now completed it, and the feedback has been very positive

Data Snapshot (cont.)

Total value of Scotland's red meat and offal exports reached

**£137m,
up 47% and
exceeded
£100m**

for the first time



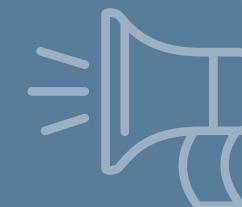
Scotch Beef Club relaunched with more than

50

locations, including Buzzworks and Hearts FC

**26 MP/MSP engagements
and 18 consultation
responses**

delivered on behalf of the red meat supply chain



More than
**30 Make it Scotch
Ambassadors**
available around Scotland to support red meat nutrition and farming sessions, and cookery demonstrations



Monitor Farm:
**23 open
meetings,**
attracting more
than 1k attendees
and 99% of farmers
surveyed plan to
attend future meetings

Making Scotland *the choice* for premium red meat

Chair & Chief Executive Address

Reflecting on 2024, we are proud of the progress Quality Meat Scotland (QMS) has made in establishing Scotland as the premium choice for red meat. This year marked the successful completion of our strategic restructure and the first year of delivering our five-year strategy to 2028. Thanks to the dedication of our team and partners, we have laid a strong foundation for growth, innovation, and collaboration across the sector.

Domestically, the £3.5 billion red meat sector continues to demonstrate resilience, with processing turnover rising for the fourth consecutive year.

Internationally, Scotland's red meat sector has gained significant recognition. There has been a remarkable rise in the total value of Scotland's red meat and offal sold outside the UK to £137 million in the year from August 2023 to July 2024. This is this first-time exports have surpassed £100 million on record, with Scotch Lamb accounting for nearly one-third of that value. Whilst some of the growth will reflect price inflation, it also points to a greater focus on exports as well



as an adaptability and resilience across the supply chain despite ongoing challenges posed by Brexit.

Showcasing our brands at SIAL Paris, Gulfood Dubai, and through domestic consumer marketing campaigns and events has reinforced that Scotch Beef, Scotch Lamb, and Specially Selected Pork stand for premium quality, sustainability, and integrity.

A calendar highlight is QMS's enduring presence at the Royal Highland Show. This year, we were 'all around the show' showcasing our brands and, as ever, the main QMS stand was a bustling hub for members, levy payers and partners across the red meat supply chain to participate in conversations shaping Scottish agriculture's future. Our industry breakfast briefings on Thursday and Friday drew hundreds of stakeholders, with key presentations from First Minister John Swinney, Cabinet Secretary for Rural Affairs, Land Reform and Islands Mairi Gougeon and strategic net zero advisor and innovator Professor John Gilliland. The clear message from government was that they recognise, appreciate and care about the challenges and issues the agriculture sector and rural communities in Scotland face, and will address those issues as part of a team Scotland approach.

We also reached more consumers than ever before. Campaigns such as When You Know, You Know and Meat & 2.0 have strengthened brand recognition and loyalty, with 80% of adults in Scotland now aware of our brands.



Making Scotland **the choice** for premium red meat (cont.)

Our QMS Scotch Ambassador scheme and the Eat to Compete partnership with Glasgow Warriors and Edinburgh Rugby are expanding engagement in communities across Scotland and promoting the link between red meat and performance on and off the pitch.

Through partnerships like the Environmental Baseline pilot with Agriculture and Horticulture Development Board (AHDB), we are helping farmers measure and improve their carbon footprint, supporting a fair representation of agriculture's net positive impact. Our industry development programmes – including the Scottish Government-funded Monitor Farm Scotland Programme – continue to foster skills, collaboration, knowledge-transfer and sustainability across Scotland. At the midway point in the programme, over 1000 farmers have been connected, covering more than 60 topics such as financial performance, biodiversity and nutrition management over 48 meetings across key regions in Scotland.

This progress comes amid ongoing challenges: weather, economic pressures, global trade volatility, changes to immigration policy, and a declining livestock base. Our role at QMS is to provide stability, insight, and direction, helping the sector navigate these uncertainties while unlocking opportunities for growth and sustainability.



We have continued to evolve as an organisation, investing in talent, refining our structure, and ensuring our teams can deliver at their best. 'Marketing' and 'Communications and External Affairs' now operate with distinct yet complementary mandates, while our restructured industry committees foster strategic collaboration and action across beef, sheep, pig, and climate and nature initiatives.

Looking ahead, we remain committed to championing Scotland's red meat sector – protecting its reputation, driving demand, and ensuring our brands continue to stand for quality, provenance, and integrity at home

and abroad. We thank our workforce, Board, and industry partners for their dedication and collaboration. Together, we are building a confident, forward-looking industry that makes Scotland the clear choice for premium red meat.

Sarah Millar,
QMS Chief Executive

Kate Rowell,
QMS Chair

Marketing 2024/2025

It's been a year of standout campaigns and strengthened partnerships, all driving greater awareness and trust in Scotch Beef PGI, Scotch Lamb PGI and Specially Selected Pork as premium, healthy and versatile choices.

Our new WYKYK campaign developed by Multiply has been a game-changer, bringing authentic Scottish stories to screens and significantly lifting brand awareness and trust. We want consumers to discover more about our brands and experience that moment of realisation, clarity, and deeper understanding that truly changes the game when buying red meat. Once you grasp the Scotch difference, you'll wonder why you'd choose anything else.



We also delivered seasonal activity including 'Meat & 2.0', 'Make it a Sizzling Summer', and festive campaigns reaching over 47 million consumers through TV, radio, digital and outdoor media. Highlights included our Blue Monday bacon roll pop-up and the Lamb for St Andrew's Day celebration featuring Masterchef: The Professionals 2008 winner and Chef, Derek Johnston. The Make it Lamb campaign - a collaboration between all four UK red meat

levy boards - reached almost 2 million users across social media.

Our strong retail and event presence continued at the Royal Highland Show, Turriff Show and through collaborations with Aldi and Lidl, while partnerships such as Love Lamb Week and BBQ Week helped encourage consumers to enjoy red meat in new ways.

We also launched the £50,000 Community Marketing Fund, supporting 20 local events that champion Scotch products across Scotland.

Our consumer press activity, delivered with Stripe Communications generated over 100 media features and helped strengthen perception of Scotch brands as trusted, quality assured and great value.

Brands Integrity

The Brands Integrity team continues to uphold some of the highest assurance standards in the world for Scotch Beef, Scotch Lamb and Specially Selected Pork.



2024/25 saw the start of the Cattle and Sheep Standards review, ensuring our assurance schemes remain robust and future-ready, with new standards due to take effect from January 2026.

We launched a new QMS Traceability Checker with ScotEID, now in final pilot stages before full rollout in summer 2025. Assurance renewal rates remain strong with 8,235 of 8,451 members renewed, and coverage levels across prime cattle, cows, lambs and bulls all above 90%.

Regional assessor workshops and mart pop-ups strengthened support for members and reinforced confidence in QMS's quality assurance network.

Category Development

Our Category Development and Research team have deepened insight into consumer behaviour, retail performance and market trends to guide strategic decision-making.

Key projects included the Sustainability and Provenance research, which informed marketing campaigns and the 'Reasons to Believe the Scotch Difference' presentation for retailers.

The team delivered valuable stakeholder insight through presentations such as Butchers Deep Dive, 5-Year Red Meat Consumption Trends, and a bespoke Foodservice Channel study with Lumina Intelligence.

We also completed the annual Kantar presentation, migrated to a new insights platform, and ran the 2024 Member Survey to benchmark future engagement and initiatives.



The new WYKYK campaign reached over 70% of adults in Scotland in the initial six week launch period, with the festive element climbing to nearly 80% of adults in Scotland driven by a Christmas TV ad and channel sponsorship. Scotch Beef and Scotch Lamb recognition rose to 84% (from 78%), while Specially Selected Pork brand awareness jumped from 35% to 53%. Trust levels saw growth across all three brands, most notably Specially Selected Pork which increased from 14% to 56%.



TOM GIBSON

Director of Business Development

|| We've led key initiatives, from advancing skills development and innovation to expanding market reach and championing sustainability, and our team has been pivotal in creating real, lasting impact for farmers and processors. ||

Business Development 2024/25

It's been a strong year for Business Development, with progress across market growth, skills, sustainability, and innovation – all helping to strengthen Scotland's red meat industry.



Market Growth & Exports

We strengthened domestic retail relationships, including supporting Aldi expanding its Specially Selected Pork range. The appointment of a Private Slaughter Co-ordinator, funded by Scottish Government, is also improving abattoir access for small producers. Exports rose sharply to £137 million – a 47% year-on-year increase – supported by QMS-led activity at SIAL Paris, Gulfood UAE, IFE London, and inward trade missions from EU importers. All Scottish red meat exporters at SIAL – one of the world's premier food

and beverage trade show, welcoming 285,000 visitors from 200 countries - were very satisfied with the impact and location of the QMS flagship stand as well as quality of the catering.

Sustainability & Net Zero

The pioneering Environmental Baseline Project in collaboration with AHDB & HCC was launched at AgriScot, with soil testing and light detection and ranging (LiDAR) scanning rolled out on participating farms. The project is helping producers measure

and reduce emissions while enhancing engagement with nature restoration goals.

This is a unique opportunity to showcase tangible evidence of what we already know: that Scotch Beef, Scotch Lamb and Specially Selected Pork actively contribute to landscape preservation and carbon sequestration as well as food production. Working with AHDB on this will allow us to underline the positive environmental credentials of food production in Scotland - a tangible, positive, wide-spread and lasting outcome from close collaboration.

The Net Zero open day with internal and external speakers across specialist topics such as genetics and research was attended by 60 industry stakeholders and achieved very positive feedback, with the vast majority saying the event gave them a better understanding of net zero:

"It has increased my understanding which will show up in my carbon audits" – farmer survey feedback following net zero open day

Business Development 2024/25

(cont.)

Industry Engagement

Our "Meat the Market" events doubled in attendance, and new regional events in Dingwall, Stirling and St Boswells brought together butchers, processors, and farmers for hands-on workshops and collaboration.

There were over 100 attendees at the Building Better Beef and Sheep workshops in Dingwall and Stirling marts. 96% said that the meeting had made them more likely to consider changing some aspects of their business based on the topics discussed at the workshop.

"Great event hosted by QMS – there were presentations on flock building, marketing your products and finishing lamb, as well as a great live butchery session." –
Building Better Sheep workshop attendee

Pig Sector Development

Training programmes in stockmanship and welfare were delivered with industry partners, while benchmarking software uptake continued to grow. The PRRS and Antimicrobial Use projects received further funding to improve herd health and reduce antibiotic reliance.

Genetics

The Livestock Genetic Performance Group gained national recognition as the key driver of Scotland's genetic progress, helping shape a roadmap for sustainable breeding improvement.

Scotch Butcher & Scotch Beef Clubs

Both clubs enjoyed a busy year of events, including a knowledge transfer day at Kilmacolm Farm (with 30 members of The Scotch Beef Club and The Scotch Butchers' Club attending) and sponsorship of the Universal Cookery & Food Festival. Highlights included an all-female butcher exchange with Northern Ireland and a visit from HRH The Princess Royal to Hugh Black & Sons, celebrating excellence in Scottish butchery and apprenticeships.

"It was a great opportunity for butchers, chefs and apprentices to come together and learn first-hand what it takes to become a QMS assured farmer, gain insight into what it means to have a true grass-fed suckler beef herd and the breeding and genetic methods that go with that." – Laura Black, Cooper Butchers on the knowledge transfer day at Kilmacolm farm

Monitor Farm Scotland

In 2024/25, the Monitor Farm Programme hosted 23 open meetings with over 1,000 attendees, promoting collaboration and practical learning on sustainability and productivity. New trials in cover crops, nitrogen efficiency, and virtual fencing are helping farmers improve performance. The launch of the Field Talk podcast at AgriScot has further extended the programme's reach and knowledge sharing across Scotland.



Recent surveys highlight the programme's popularity and positive influence:

- 99% of farmers plan to attend future meetings
- 87% report improved technical knowledge
- 78% say it will improve business decision-making
- 90% of management group members say it has strengthened local collaboration and communication



HOLLY MCLENNAN,
Director of Communications & External Affairs

Major focusses this year included enhancing the accessibility of our evidence centre to support decision makers across the red meat supply chain; working with food and agriculture partners to showcase the multiple goods of red meat in 'real life settings' to political stakeholders; and reaching more young people than ever before with our community engagement initiatives such as the popular Meat Voucher Scheme. //

Communications and External Affairs (C&EA) 2024/25

We completed the transformation of the Communications and External Affairs (C&EA) team in-line with QMS's five-year strategy with several new appointments to bolster our strategic and specialist capabilities across Corporate Communications, Public Affairs, Industry Strategy and Community Engagement, and Market Intelligence. Bringing services such as external communications in-house, has increased our media engagements and opportunities to promote key advice and information across agriculture and national media.

To ensure a strategic, planned and measured approach, the QMS C&EA Strategy to 2028 was created with a clear focus on communicating the benefits and opportunities of red meat in Scotland across our economy, environment and society. Our primary aims are to inform, collaborate and engage with members and levy payers on the right things, in the right way, at the right time and tell the positive red meat story to decision makers, influencers and citizens across Scotland.

If our uptick in audience is anything to go by, those who subscribe to our weekly newsletter and monthly podcast have also been enjoying enhancements we've made following industry feedback. We are proud that the QMS podcast has ranked 14 in the top 50 Beef Podcasts of 2025 (Million Podcasts) and achieved around 27 thousand downloads.

Publication of the Scottish Red Meat Industry Profile

The Scottish Red Meat Industry Profile continues to be our key statistical reference document for the sector. The report shows significant opportunities for our £3.5bn sector to enhance its contribution to Scotland's economy and the UK's food security. In 2023, turnover from red meat processing in Scotland rose for a fourth consecutive year, increasing by 1% to £975m. This year we launched the profile at Turriff Show for the first time, presenting a snapshot to around 40 industry representatives and distributing copies more widely for use in their work.

Cattle numbers project model shows potential growth

From the beginning of the year, QMS has continued to be on the pulse with our sector's critical issue: declining livestock. Cattle forecast modelling was created and presented to key stakeholders across the supply chain, including processors and government to showcase the economic potential of Scotland's beef sector. We also developed a new beef sector opportunity model evaluating the Scottish beef sector growth proposition. It showed that if action was taken in three areas of performance – stabilising the beef herd against the long-term downwards trend, boosting productivity of the breeding herd and slowing the outflow of prime cattle to England

and Wales – the projected decline based on existing trends could be reversed with potential to generate a significant boost to the Scottish economy. The growth scenario includes an extra £76.6m of output and £17.5m of gross value added (GVA) to the Scottish economy through the prime beef sector in 2030 compared to 2023. A communications strategy in partnership with the Scottish Red Meat Resilience Group (SRMRG) – the 'Meating Our Potential' campaign – was also created to raise awareness of the opportunity and support sector confidence for launch in 2025/26.

Industry Engagement

As part of our organisational transformation and focus on supporting all those working across the red meat supply chain, we've successfully restructured and kicked off the initial meetings of our industry committees to modernise and drive action. The four new industry leadership groups are Beef, Sheep, Pig and Climate and Nature and are focussed on sector strategy work and ensuring clear species-specific alignment across the supply chain. Our important role as part of the policy-focussed SRMRG, as well as other groups including Standards Setting Bodies, Butchers Advisory Group and Brands Integrity Advisory Group continues.

Communications and External Affairs (C&EA) 2024/25

(cont.)

Industry Reputation

We have broadened our outreach focus from 'health and education' to 'community engagement' and rolled out activity to reach more than 6000 of people in communities across Scotland, inside and outside the classroom. We also:

- Established of our QMS Scotch Ambassador programme – a cohort of more than 30 dynamic individuals who share a passion for farming, food and education in the key regions of Scotland. These partners are trusted voices for the red meat sector and are on call to deliver cookery demonstrations, hands-on farming sessions and educational presentations through the year.
- Announced our landmark partnership with Scotland's two professional rugby teams, Glasgow Warriors and Edinburgh Rugby: focussing on the positive role of premium red meat in health and performance. As part of this we've teamed up with familiar faces and delivered several 'Eat to Compete' days alongside a toolkit, aimed at engaging the next generation on the



Food and Agriculture Stakeholder Taskforce (FAST) reception

QMS is one of 16 founding organisations working constructively with government, politicians and other stakeholders to ensure a resilient and thriving farming and primary food production sector in Scotland. The FAST group hosted a parliamentary reception sponsored by Elena Whitham MSP for Carrick, Cumnock and Doon Valley to stimulate discussion and understanding with MPs about what is needed to promote

sustainable and profitable agricultural production in Scotland.

"We know parliamentarians value the support from FAST members who have done a lot to help them understand the complex nuances and interdependencies within Scotland's farming businesses and how policy changes might impact them."

– Neil Wilson, Institute of Auctioneers and Appraisers in Scotland (IAAS) Executive Director





DEBBIE PHILLIPS, Head of Corporate Services

“This year has been one of positive progress and growth for QMS. A key milestone was our successful office move, creating a modern space that reflects our collaborative culture and supports our growing team.”

People

We've welcomed new colleagues across communications, events, and operations, bringing fresh energy and expertise to help deliver our ambitious plans. Employee engagement has remained strong, with positive feedback from our staff survey and ongoing work through our People Strategy to support leadership, development and team building.

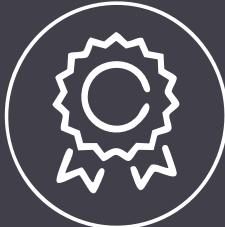
We also introduced new sustainability measures, including mileage tracking, and made further improvements to our audit and financial processes.

With an engaged team, supportive culture, and focus on continuous improvement, QMS is well positioned for another successful year ahead.



QMS Strategic Pillars and Impact Indicators 2024-25

These indicators have been designed to measure the effectiveness of our initiatives, assess the impact of our work and track our progress towards the goals outlined in our five-year strategic plan. This year marks the first year of the strategy and we have used it as a baseline to evaluate our performance.



**STRATEGIC PILLAR 1
Provenance**

No.	Impact Indicator	2024-25 Results
1.1	The % of total Scotch beef, lamb and pork were marketed under the Scotch and Specially Selected Pork brand.	During the year, Scotch Beef saw 51.8% coverage in Scotland (+1.8% YOY), while Scotch Lamb was 29.9% coverage in Scotland (-0.8% YOY) and Specially Selected Pork had 3.3% coverage in Scotland (flat YOY). 
1.2	Consumer brand awareness, brand perception and propensity to purchase.	Driven by the new campaign, we saw marked positive increases against all key brand health measures vs the January 2024 baseline for Scotch Beef, Scotch Lamb and Specially Selected Pork on our independent brand tracker. Awareness, relevance, quality and trust scores performed particularly well. 
1.3	Increased proportion of lamb reared in Scotland will be processed in Scotland.	34.9% (2023/24) and 36.6% (2024/25). 
1.4	Increase in % of total livestock population covered by Quality Assurance.	Finished cattle sales at Scottish auctions dipped from 95.9% to 95%, but sheep increased from 89.9% to 90.5% with a .07% lift for prime lambs and hoggs. 

Key:

-  = positive
-  = neutral position
-  = downward trend

Baseline = no prior years' data



STRATEGIC PILLAR 2

Productivity & Profitability

No.	Impact Indicator	2024-25 Results	
2.1	A greater proportion of output going to export market.	£97m (2023/24) and £137m (2024/25).	↑
2.2	Increase in partnership projects/ aligned marketing projects with multiple retailers.	We launched 19 new partner projects.	Baseline
2.3	Increase in total output sold to independent retail.	7.1% (2023/24) and 7.7% (2024/25)	↑
2.4	Increased output from breeding herds and flock.	Dip in calf to cow ratios but lift in calf registrations compared to cow numbers; slight uptick in lambs to ewes ratio but below 2020-22 peak.	↔
2.5	Increased engagement with on farm initiatives, such as Monitor Farm & Meat the Market.	Digital engagement up by more than 114% and face-to-face engagement up by 84% since 2023/24.	↑
2.6	Increase in partnership projects with processors.	We completed 56 new projects.	Baseline



STRATEGIC PILLAR 3

Planet & Place

No.	Impact Indicator	2024-25 Results	
3.1	Every Quality Assurance member engaged with an emissions reduction programme.	Currently in discussions with relevant parties around access to suitable emissions data for our quality assurance members, no data was obtained 2024/25.	
3.2	Environmental progress is articulated and visible through our brands.	Positive environmental messaging forms a regular part of industry and consumer communications. An industry-wide environmental pilot programme launched in December, with generated evidence of environmental progress to strengthen our brand messaging.	↑
3.3	The Scottish public perception is favourable towards the Scottish red meat sector.	Positive results in awareness from Scotch Beef and Scotch Lamb brands through independent brand health tracker which showed a marked positive increase against all key measures against January 2024 baseline.	↑



STRATEGIC PILLAR 4

People

No.	Impact Indicator	2024-25 Results	
4.1	Positive perception of QMS among stakeholders.	Organic engagement rate on QMS social media channels, with more than 6,000 newsletter subscribers, 27,000 downloads of the podcast, and roughly 250-300 monthly listeners consistently on the new series ⁴ .	Baseline
4.2	Positive perception of QMS among levy payers.	Brands Integrity (BI) survey 3.5 stars/5.	Baseline
4.3	QMS is viewed by employees as a great place to work.	85% of employees agree QMS is a great place to work.	Baseline
4.4	Positive perception of QMS among decision makers.	62% of MSPs favourable, 0% unfavourable, 38% neutral.	Baseline

⁴ The organic engagement rate on social media refers to the level of interaction (likes, comments, shares, etc.) a post receives from users without the use of paid promotions. It is calculated by dividing the total number of engagements by the total reach or impressions of the post, providing insight into the effectiveness of content in reaching and engaging an audience naturally completed.

Quality Meat Scotland

Impact Summary

April 2024-March 2025



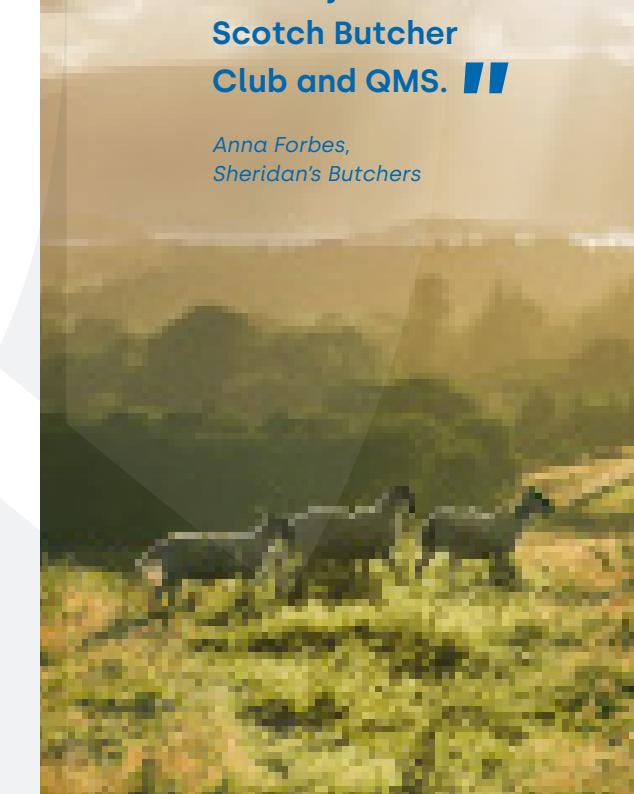
Progress on Strategic Indicators

PILLAR	INDICATOR	IMPACT IN ACTION
Provenance	% of total beef, lamb and pork marketed under the Scotch or specially selected pork brand	<ul style="list-style-type: none"> - New Tactical Brand Campaign Meat & 2.0 - encouraging consumers to reimagine the tradition of 'meat and two veg' after research reveals almost one-third (30%) report bad memories of meat and two veg mealtimes. This award-winning campaign ran across press, radio, digital and social media and reached nearly 2.5m adults in Scotland.
	Consumer brand awareness, brand perception and propensity to purchase	<ul style="list-style-type: none"> - Launch of 'When you know you Know' campaign to educate and inspire consumers on what's behind our blue labels, and reached over 70% of adults in Scotland using a mix of TV, STV Player, Outdoor, News partnerships, Digital and Paid Social ads and was supported with PR activity. - Strong presence at the 2024 Royal Highland Show – QMS 'all around the show' at main stand and our Lidl and Aldi partnerships. - Love Lamb Week in collaboration AHDB, HCC and LMC celebrating lamb's naturally delicious flavour and versatility, encouraging the nation to try lamb in different ways. - £50,000 Community Marketing Fund - 20 grants issued between April and September Scotland-wide. - The art of the BBQ Guide - 26k copies distributed to Scotch Butcher Club members for their shops and shared widely online as download. - We set out to Make it a Sizzling Summer with our Bauer radio campaign which delivered 19.5m opportunities to hear about our Scotch Beef, Scotch Lamb and Specially Selected Pork brands. We also ran a BBQ campaign on Facebook and Instagram to support this.
	An increased proportion of lamb reared in Scotland will be processed in Scotland	<ul style="list-style-type: none"> - Re-established our consumer press office following the appointment of Stripe Communications and which secured over 100 pieces of content/ coverage in year 1. - Drop-in clinics across key Scottish livestock marts were successful in engaging with members on all things QA. - The Cattle & Sheep Standards review process has officially commenced, marking an important step in ensuring the standards remain relevant, robust, and reflective of industry best practices. Members have been actively involved throughout the review, with strong industry representation on the Standard Setting Body.
	Increase in % of total livestock population covered by Quality Assurance	

Being part of the Scotch Butchers Club and helping QMS on various projects has given me personal belief. It's allowed me to meet amazing people and experience great things. The future looks bright thanks to everyone at the Scotch Butcher Club and QMS. //

Anna Forbes,
Sheridan's Butchers

PILLAR	INDICATOR	IMPACT IN ACTION
Productivity & Profitability	A greater proportion of output going to export markets	<p>Market Building</p> <ul style="list-style-type: none"> Scotch Beef Club members – acclaimed Scottish Bar and Restaurant Group, Buzzworks Holdings became first group member and Hearts FC became first Scottish football club to join. Relaunch is going well with approx. 50 locations now signed up. Aldi expansion of Specially Selected Pork range. Universal Cookery and Food Festival (UCFF) Gold sponsor - 400 attendees actively engaging with chefs and food industry professionals to promote the quality, sustainability and provenance of the brands. John Gilmour Butchers successful launch of Scotch Beef to the London foodservice and hospitality market at a prestigious event at Dover House. The exclusive event took place by permission of the Secretary of State for Scotland, Ian Murray MP, and brought together close to 100 key figures from the culinary, hospitality and political sectors, including Scottish MPs.
	Increase in partnership projects/ aligned marketing projects with multiple retailers	<p>Developing skills across supply chain</p> <ul style="list-style-type: none"> QMS and industry partner butchery demonstrations – to hundreds of industry stakeholders at the Food for Thought Cookery Theatre at the Royal Highland Show. Butchery apprentice opportunities – provided L&D on product innovation and value-added products to 24 apprentice butchers across Scotland at events in Dundee and Larkhall.
	Increase in total output sold to independent retail	<p>Knowledge transfer day - at Kilmacolm Farm Tours, bringing together almost thirty members of The Scotch Beef Club and The Scotch Butchers' Club with a focus on the unique qualities of Scotch red meat and importance of supply chain join-up and cross- collaboration.</p>
	Increased output from breeding herds and flock	<ul style="list-style-type: none"> First all-female cohort of Scottish butchery business managers and colleagues visited leading Northern Irish butchers. Four 'Meat the Market' workshops with stakeholders including Dunbia Highland Meats, John Munro Ltd, and Morrisons Woodhead Brothers, designed to provide farmers with essential knowledge on carcass grading, market specifications, and customer requirements.
	Increased engagement with on farm initiatives such as Monitor Farm / Meat the Market	<p>Net Zero</p> <ul style="list-style-type: none"> On-farm environmental baselining pilot in partnership with AHDB expressions of interest announced, which will include Scottish livestock farms. Net zero open days - held in July and August in collaboration with the AgriScot Beef and Sheep Farm of the Year award winners, with almost 100 combined attendees. Scotsheep – QMS was leading sponsor and delivered a seminar on the opportunity of net zero and QMS's work to support businesses across the supply chain to achieve it, as well as practical butchery.
Innovation	Increase in partnership projects with processors	<p>Monitor Farm Programme</p> <ul style="list-style-type: none"> Four summer meetings – focused on forage and finishing cattle (Deeside); building resilience with Farmstrong Scotland (Roxburghshire); grazing and managing time (Argyllshire); and growing for optimum output (Dumfriesshire). Two summer open days - at award-winning farms for farmers and crofters to learn about practices aimed at improving profitability and efficiency while also reducing carbon emissions. One autumn meeting – Strathspey on cattle condition scoring, nutrition, winter housing preparation and back-end grazing.
	Increase in innovation projects	<p>QMS Innovation Fund – delivered a series of innovation projects across the supply chain, including:</p> <ul style="list-style-type: none"> QMS and industry partner butchery demonstrations – to hundreds of industry stakeholders at the Food for Thought Cookery Theatre at the Royal Highland Show. Butchery apprentice opportunities – provided L&D on product innovation and value-added products to 24 apprentice butchers across Scotland at events in Dundee and Larkhall. Knowledge transfer day - at Kilmacolm Farm Tours, bringing together almost thirty members of The Scotch Beef Club and The Scotch Butchers' Club with a focus on the unique qualities of Scotch red meat and importance of supply chain join-up and cross- collaboration. First all-female cohort of Scottish butchery business managers and colleagues visited leading Northern Irish butchers. Four 'Meat the Market' workshops with stakeholders including Dunbia Highland Meats, John Munro Ltd, and Morrisons Woodhead Brothers, designed to provide farmers with essential knowledge on carcass grading, market specifications, and customer requirements.



LAUNCH OF SCOTCH
AMBASSADOR SCHEME

30 

passionate
individuals from red
meat and education
sectors to share
positive messages
across Scotland.

Cookery
demonstrations
reaching more than

3000
SCHOOL PUPILS

PILLAR	INDICATOR	IMPACT IN ACTION
Planet & Place	Every Quality Assurance member engaged with an emissions reduction programme	<ul style="list-style-type: none">– Environmental Baseline project with Agriculture and Horticulture Development Board (AHDB) - 22 beef, lamb and pork farms in Scotland selected to take part in pilot.– Publication of the Red Meat Industry Profile, presented to an industry audience at the Turriff Show.– Cattle numbers projection model and industry presentation at annual SAMW conference including economic opportunities.– Monthly market updates, weekly price reports and regular bespoke briefings for stakeholders.– Scottish Red Meat Resilience Group - policy-focussed, 11 stakeholder attending across red meat supply chain.– Collaboration with the Scotland Food and Drink policy working group to produce a policy prospectus.– Launch of landmark sports and communities partnership with Glasgow Warriors and Edinburgh Rugby.
	Environmental progress is articulated and visible through our brands	<ul style="list-style-type: none">– Launch of Scotch Ambassador Scheme - 30 passionate individuals from red meat and education sectors to share positive messages across Scotland.– Various health and education events across Scotland including RHET food and farming days, SRUC's 'Be a Farmer' event, MooFest as well as RHET teacher training.– In-school cookery demonstrations reaching more than 3000 pupils in Scotland.– Launch of popular Meat Voucher Scheme with hundreds of applications.– Various positive press commentary on red meat in response to misleading research and information including blanket public health messages to cut red meat consumption and red meat in schools.– Appointment of Director of Communications and External Affairs (C&EA), Holly McLennan and development of C&EA Strategy.
	Scottish public perception is favourable towards the Scottish red meat sector	

PILLAR	INDICATOR	IMPACT IN ACTION
People	Positive perception of QMS amongst stakeholders	<ul style="list-style-type: none"> – Food and Agriculture Stakeholder Taskforce (FAST) reception at Holyrood <ul style="list-style-type: none"> - supported more than 130 guests at FAST Holyrood reception, stimulating discussion and understanding with MSPs about "championing Scottish agriculture", highlighting the contribution the sector makes to Scotland's economy and what the next generation needs from policy-makers to make it a viable business path for the future.
	Positive perception of QMS amongst levy payers	<ul style="list-style-type: none"> – Series of engagements with MSPs and MPs in the key political parties, with visits across the Scottish red meat supply chain - Around 10 one-to-one MSP and MP engagements between Aug and Oct. A further 25 at supply chain events. – 10 consultation responses covering food labelling proposals to bionergy to cattle ID and traceability. Industry briefings including postbudget scrutiny and EU Deforestation Regulations. – Ongoing industry products including QMS weekly newsletter and monthly podcast. Significant internal comms / culture / values activity.
	QMS is viewed by employees as a great place to work	
	Positive perception of QMS amongst decision makers	

MORE THAN 130 GUESTS
at FAST Holyrood reception.

Around **10** ONE-TO-ONE MSP AND MP

engagements between Aug and Oct. A further 25 at supply chain events.



Progress on Strategic Indicators

October 2024 – March 2025

Provenance

- **84%** brand recognition for Scotch Beef (up from 83% in Sept 2024)
- **53%** brand recognition for Specially Selected Pork (up from 52% in Sept 2024)
- **96.8%** of prime cattle sold at Scottish auctions are quality assured
- **91.6%** of lambs sold at Scottish auctions are quality assured
- **94.5%** of cows sold at Scottish auctions are quality assured
- **85.5%** of cull ewes sold at Scottish auctions are quality assured
- **42** pieces of media content/coverage (10.6m reach + 1.1m influencer views)

PILLAR	INDICATOR	IMPACT IN ACTION
Provenance	% of total beef, lamb and pork marketed under the Scotch or Specially Selected Pork brand.	<ul style="list-style-type: none"> – Lamb for St Andrew's Day – utilised the Bauer radio network as a call to action to celebrate St Andrew's Day with Scotch Lamb GI through on-air trails and an on-air competition. Partnered with Archerfield chef, Derek Johnstone to create the 2024 Lamb for St Andrew's Day dish, The Scotch Lamb Muckle Pie, securing 8 pieces of media coverage. – When you know, you know at Christmas – the second phase in our When You Know, You Know campaign to encourage shoppers to choose the brands throughout the festive season, not just Christmas Day. Delivering over 47 million opportunities to see our brand messaging through a mix of STV channel sponsorship, traditional TV advertising, articles in The Times and Scottish Sun online, social media, and on YouTube – the festive campaign delivered more than 47m opportunities to engage across TV, digital, and social. – Scotch Butchers Club – festive guide and health & nutrition guides. Over 50k copies of our guides have been circulated by members of the Scotch Butchers Club and available to view online at makeitscotch.com. In total, 26k BBQ guides were distributed and more than 50k reached via festive and health guides.
	Consumer brand awareness, brand perception, and propensity to purchase.	<ul style="list-style-type: none"> – When You Know You Know: Health & Wellbeing campaign – for those on a mission to better nutrition. A campaign to shine a spotlight on the role of Scotch Beef GI, Scotch Lamb GI & Specially Selected Pork in a healthy balanced diet. Featured our first ever STV brand story – 60s & 30s segments on STV featuring nutritionist Scott Baptie. Also took our campaign into the gym environment to inspire gym-goers with high protein dishes to support their health and fitness goals. Campaign reached 81% adults in Scotland. – Secured a total of 124 pieces – of content/coverage through consumer press office activity which equates to 10.6m media reach and 1.1m influencer views. – International Women's Day event – bringing together 11 influencers and media for an evening of story telling from farmer Cora Cooper and a hands-on cookery demo from Bethany Ferguson. Secured 36 pieces of content and media coverage equating to 65K in media impressions and 74.4K in social reach.
	An increased proportion of lamb reared in Scotland will be processed in Scotland.	<ul style="list-style-type: none"> – The traceability checkers – for QMS schemes have been upgraded for improved usability. Moving forward, all scheme traceability will be accessible through a single platform, with the rollout planned for summer 2025. – The Cattle & Sheep Standards – review process is almost finalised. Members have been actively involved throughout the review, with multiple opportunities to provide feedback and input into the document. Rollout of this version has been delayed slightly to later in 2025.
	Increase in % of total livestock population covered by Quality Assurance.	

PILLAR	INDICATOR	IMPACT IN ACTION
Productivity & Profitability	A greater proportion of output going to export markets.	<p>Monitor Farm Stats</p> <ul style="list-style-type: none"> - 23 open meetings with 1,003 attendees. - 11 podcast episodes with 1,825 downloads. - 23 videos, 9.6K views on YouTube, 443.7 hours watch time. - Published a comprehensive midpoint review highlighting that the programme strengthens collaboration and looks to future sustainability. - Almost 99% of farmers surveyed plan to attend future meetings. - 87% of attendees say the programme has improved their technical knowledge. - 78% of attendees say the programme will improve their business decision-making. - 90% of management group members say the programme has improved collaboration, co-operation, and communication between farmers in the local area. - 67% of management group members have made a change as a result of attending a monitor farm meeting, with 74% planning to. - 60+ project collaborators.
	Increase in partnership projects/aligned marketing projects with multiple retailers.	
	Increase in total output sold to independent retail.	<p>Scotch Butchers Club and Scotch Beef Club</p> <ul style="list-style-type: none"> - Scotch Butchers Club 170 members. - Scotch Beef Club +50 new members. - World Butchers Challenge 25 – UK team sponsor. - World Scotch Pie Awards – judged by Gordon Newlands. - Federcarni Italy Butchery competition – Scottish representatives Gordon Newlands & Karl Hearton (Kinnaird Butchers). - IFE trade exhibition Excel, London – National Chef of the Year, Orry Shand cookery demo to 100 attendees. - Two butchery demos, supply chain events in Stirling & Dingwall to 120 attendees. - Scottish Young Chef of the Year sponsor, won by Oliver Redgwell-Welch. - Gulfood trade show attendance in Dubai, Scotch Lamb GI cookery demo with National Chef Gary McLean. - Smithfield trade fair attendance. - Knowledge transfer day at Aberdeen & Northern Marts, 26 chef & butchery apprentices attended. - Butchery demo to Edinburgh Vet School, 50 attendees. - Taste Of Scotland trade event at Dover House, London 120 attendees. - Lamb for St Andrews Day, feeding 35,000 school children Scotch Lamb GI. - Young Chef Scotch Lamb Competition at Archerfield sponsored by QMS. - SIAL Paris trade show attendance with 40 attendees from Scottish processors & government officials. - National Fat Stock competition sponsors and demo, Lanark market. - IMeat, Italy trade event attendance and Scottish butchery demo.
	Increased output from breeding herds and flock.	
	Increased engagement with on farm initiatives such as Monitor Farm / Meat the Market.	
Partnership & Collaboration	Increase in partnership projects with processors.	<ul style="list-style-type: none"> - Hosted our first two Building Better Beef and Lamb Days in Dingwall and Stirling Marts, with over 100 attendees. - Feedback showed attendees rated the content and speakers as 'excellent'. - 96% said the event made them more likely to consider changes in their business. - Covered four key topics: Herd/flock management, Health planning, Understanding the market, Finishing and finding a buyer. - All attendees said the event improved their understanding of these topics - Key takeaways: importance of farm assurance, marketing plans, genetics, and selling at the right time. <p>Quote: "It would be hard to improve this event – it was outstanding."</p> <ul style="list-style-type: none"> - Following this success, we aim to expand with two full-day workshops later this year, featuring expert speakers and engaging discussions.
	Increase in partnership projects with retailers.	

Productivity & Profitability

- Monitor Farm mid-way report showed **87%** of event attendees have improved technical knowledge and **78%** expect better decision making
- **24** apprentice butchers trained in innovation and value-added products
- Meat the Market attendance doubled, with four new workshops delivered

- **25** community engagement events reaching **3,000+ pupils and educators**
- **22** Scottish livestock farms included in the Environmental Baseline Project (20 beef & sheep, 2 pig)
- **27k** downloads of the QMS podcast (top-ranked beef podcast globally in 2025)
- **100s** of schools participating in the Meat Voucher Scheme
- **130+** guests attended the Holyrood parliamentary reception (May 2024)

PILLAR	INDICATOR	IMPACT IN ACTION
Planet & Place	Every Quality Assurance member engaged with an emissions reduction programme.	<p>Reputation</p> <ul style="list-style-type: none"> - 25 community engagement events reaching more than 3000 pupils and educators across Scotland. - Enhancements – review and refresh of Farming Foodsteps educational website and upskilling the Scotch Ambassadors for excellent events. - Published new 'Get in the know. Celebrating the positives of red meat' industry toolkit to support positive storytelling. - Meat Voucher Scheme – utilised by hundreds of schools across Scotland, linking into Tasty Little Weeks spotlighting each of the three red meat proteins.
	Environmental progress is articulated and visible through our brands.	<ul style="list-style-type: none"> - Developed the Eat to Compete resource connecting red meat nutrition and sporting performance, as well as holding first Eat to Compete development days with Scotland's two professional rugby teams. - QMS podcast has achieved 28,301 downloads since published and is considered one of the world's top beef podcasts of 2025 (Million Podcasts). - Global Burger Challenge – reached 730 school pupils in Scotland. - Lamb for St Andrew's Day – communications plan working with partners such as the National Sheep Association, Scottish Association of Young Farmers, and Scottish Government to promote Scotch Lamb GI and lamb bank (included Holyrood canteen event and young chef competition). - Parliamentary reception – more than 130 guests attended the reception at Holyrood in May 2024.
	Scottish public perception is favourable towards the Scottish red meat sector.	<p>Proactive and reactive red meat evidence and commentary – ongoing services from Market Intelligence and Corporate Communications including monthly market updates, weekly price reports and regular commentary / briefings for stakeholders. Our Chair and Chief Executive have featured on national news including ITV, STV, and BBC Scotland highlighting red meat hot topics such as cattle numbers, beef prices, and market trends.</p> <p>Environmental baselining project – developed and began implementing joint communications plan with AHDB to highlight progress on agriculture net zero benchmarking.</p> <p>Events – managed and supported attendance at several key events including the world's premier food and beverage trade show: SIAL Paris with the Cabinet Secretary for Rural Affairs, Land Reform and Islands; AgriScot; World Without Cows Scottish screening; Christmas Classic; NFUS conference; showcasing Scotch Lamb GI at Gulfood in Dubai; and showcasing the Scotch brands at the premier trade event for food and drink professionals: IFE in London.</p>

PILLAR	INDICATOR	IMPACT IN ACTION
People	Positive perception of QMS amongst stakeholders.	<p>Beef sector opportunity economic modelling – developed and briefed/presented domestic supply opportunity from a growing population by 2030 to the SRMRG and Scottish Government. In addition, a communications plans for the Meating Our Potential partnership campaign was created with positive feedback and support across the Scottish red meat supply chain.</p> <p>Public Affairs</p> <ul style="list-style-type: none"> – 16 MP/MSP engagements, with a focus on MPs newly elected in the 2024 General Election to highlight the vital role the red meat supply chain plays in their constituencies. For example, Stephen Gethins MP butcher visit in Broughty Ferry, Euan Stainbank MP visit at Campbells Prime Meat and Chris Kane visit at United Auctions in Stirling. – 'Taste of Scotland' event at Dover House in London, bringing together 22 leading Scottish food and drink producers to promote Scotland's produce to an influential audience of global diplomats and UK parliamentarians. <p>Industry strategy – restructured Industry Leadership Groups (ILGs) had their first formal meetings including Beef, Sheep, Pig, and Climate and Nature, as well as the policy-focussed SRMRG meetings – which was attended by Minister Fairlie and other Scottish Government representatives.</p> <p>Consultation responses – 8 across UK and Scottish Government including topics such as EU Deforestation Regulation, EU alignment, Scottish labour, export led growth, EU-UK reset, Rural Delivery Plan, and Animal Health. We also gave evidence in Scottish parliament on both UK-EU alignment and agriculture transition.</p> <p>Industry asset improvements</p> <ul style="list-style-type: none"> – Newsletter refreshed to streamline and increase focus on market intelligence. – QMS podcast new host – well-known agriculture commentator, Claire Taylor with high profile guests such as Dr Carrie Ruxton, James Withers, and Martin Kenny – around 27k downloads month-on-month. – Piloted one-page red meat 'topic sheets' starting with environment and aim to develop a suite of these for various stakeholders in 2025/26. <p>Internal communications – developed and implemented communications plan with assets such as a fortnightly internal newsletter and regular L&D sessions.</p>
	Positive perception of QMS amongst levy payers.	
	QMS is viewed by employees as a great place to work.	
	Positive perception of QMS amongst decision makers.	

26
MP/MSP
engagements
and

18
consultation
responses
delivered on
behalf of the
red meat
supply chain

Financials

The full Annual Report & Accounts for the financial year ended 31 March 2025 are available via the following link: [here](#)



Quality Meat Scotland

Annual Review

2024-2025

