



Gold Sponsor



Future Thinking on Red Meat conference

Murrayfield Stadium, Edinburgh
Tuesday 10 March

SCOTLAND
FOOD & DRINK

MONEY



KEPAK
McIntosh
Donald

Welcome

10:15

Kate Rowell

Chair, Quality Meat Scotland

Tackling our shared challenge: livestock supply shortage

10:30

- Dr Phil Hadley, Secretary General, International Meat Secretariat
 - Sarah Millar, Chief Executive, Quality Meat Scotland
 - Panel discussion with Dr Phil Hadley & the Scottish Red Meat Resilience Group
-

Quality Meat Scotland

10th March 2026

Dr Phil Hadley, International Meat Secretariat (IMS)



Livestock supply and dynamics



- **Overview of global production**
- **Underpinning dynamics impacting production**
- **Political landscape**
- **Consumer attitude**
- **Changing purchase drivers**



International Meat Secretariat (IMS)- Est 1974, HQ Paris



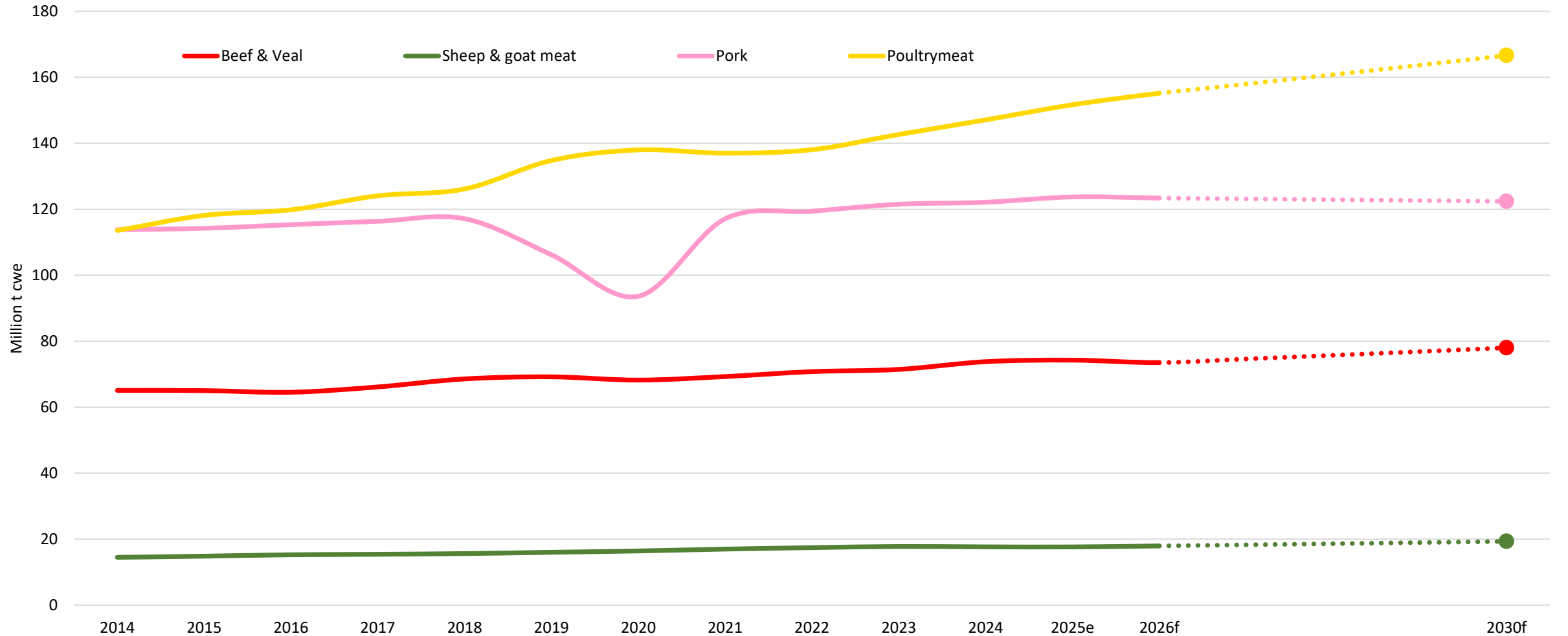
- **IMS represents the global sector, taking on shared challenges/industry defence**
- **Has status with the global policy setters across the relevant areas: FAO, CODEX, WOAHA, etc -platform for balanced debate on behalf of the sectors**
- **Facilitates discussions trade, animal health, human nutrition, sustainability, etc**
- **Hosts the World Meat Congress**
- **QMS is an active member**



World meat production, 2014-26f & 30f

2030f: Poultry expected to contribute ~80% of meat supply growth

Global Meat Production Volume: main species, 000t cwe



Source: Gira compilations

Total meat production changes, 2025e-30f

2030f meat production growth except in EU and China



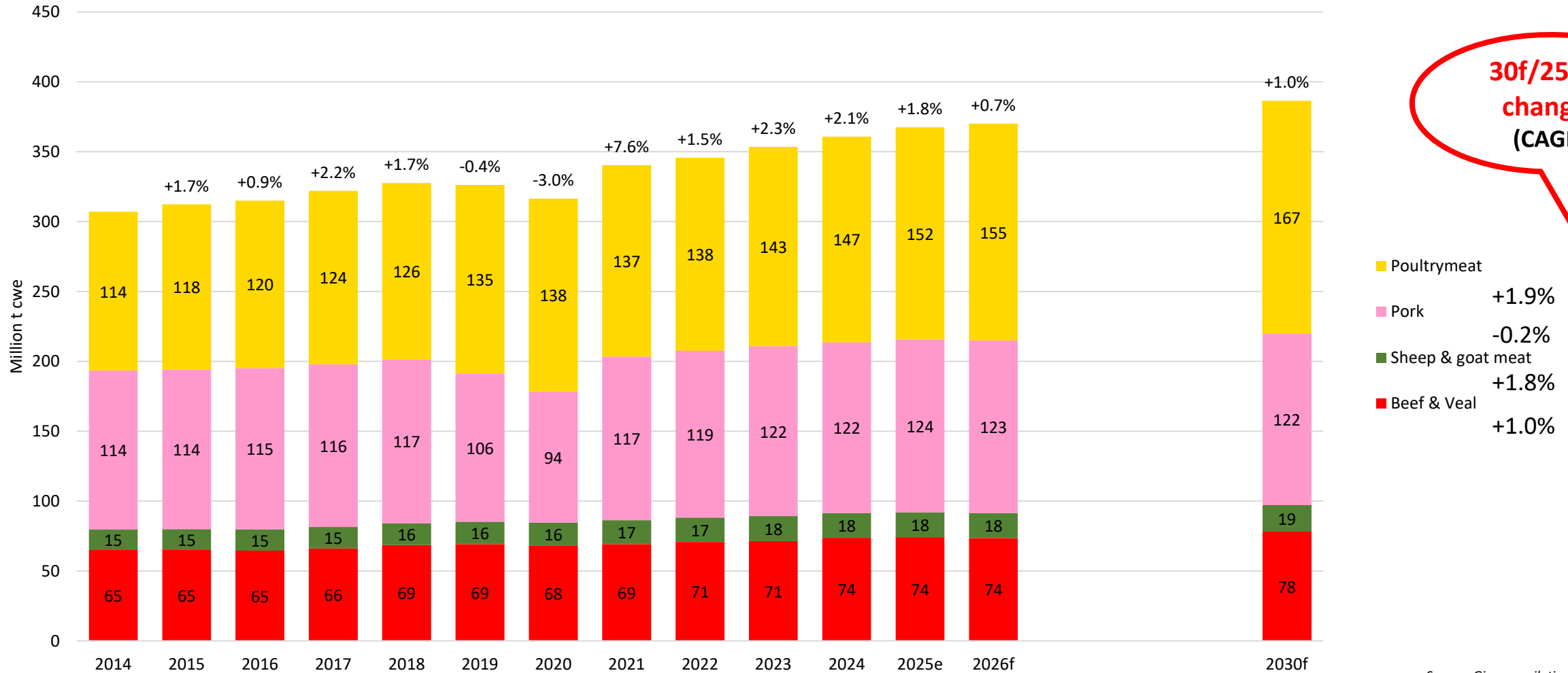
Source: Gira compilations



World meat consumption, 2013-25f & 30f

Chicken's relatively low cost and flexibility drive global market growth

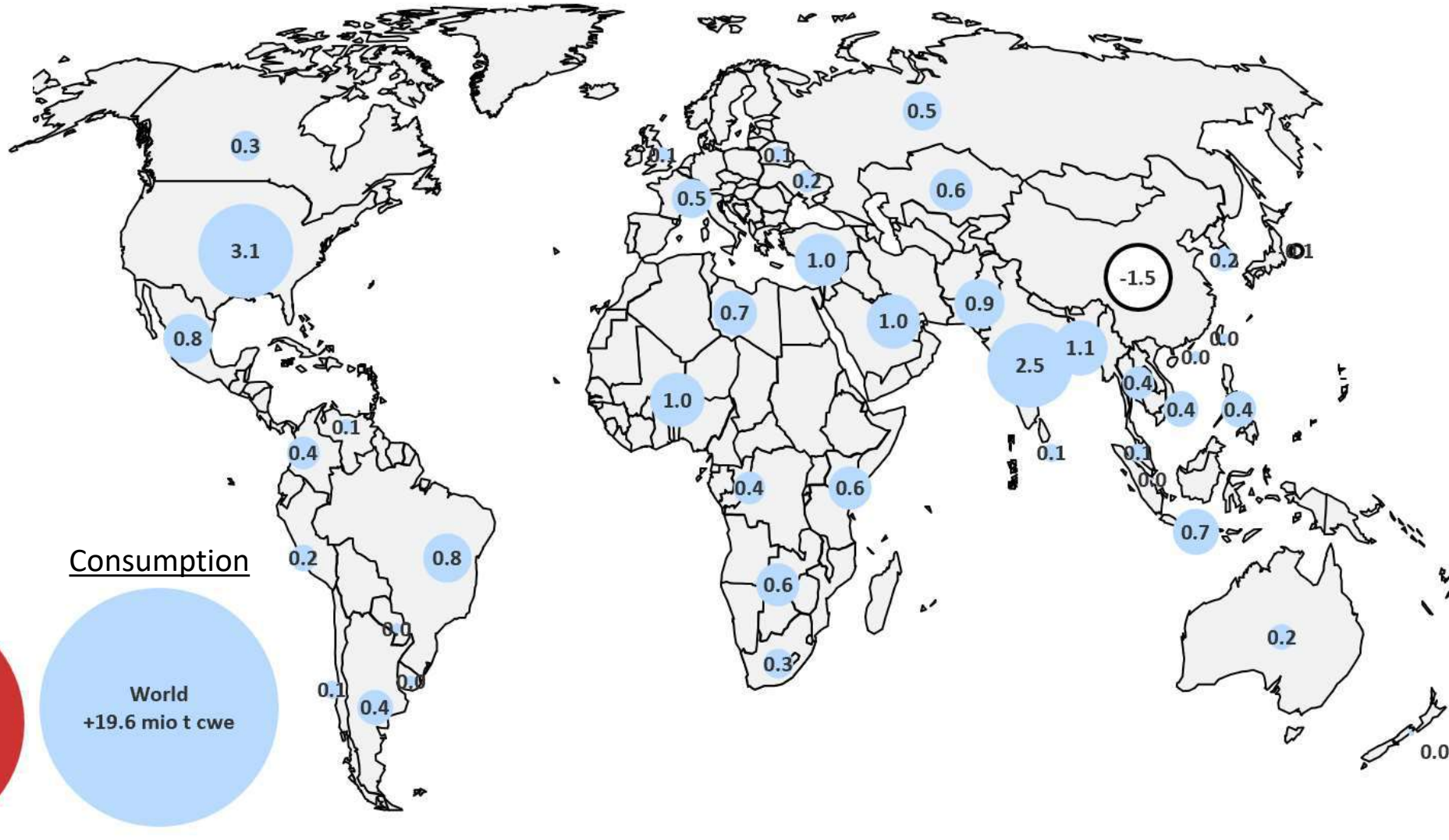
Global Meat Consumption Volumes: main species, mio t cwe



Source: Gira compilations

Total meat consumption changes, 2025e-30f

Widespread growth, especially in S + SE Asia ... but decline in CN



Production

Consumption

World
+19.0 mio t cwe

World
+19.6 mio t cwe

Source: Gira compilations

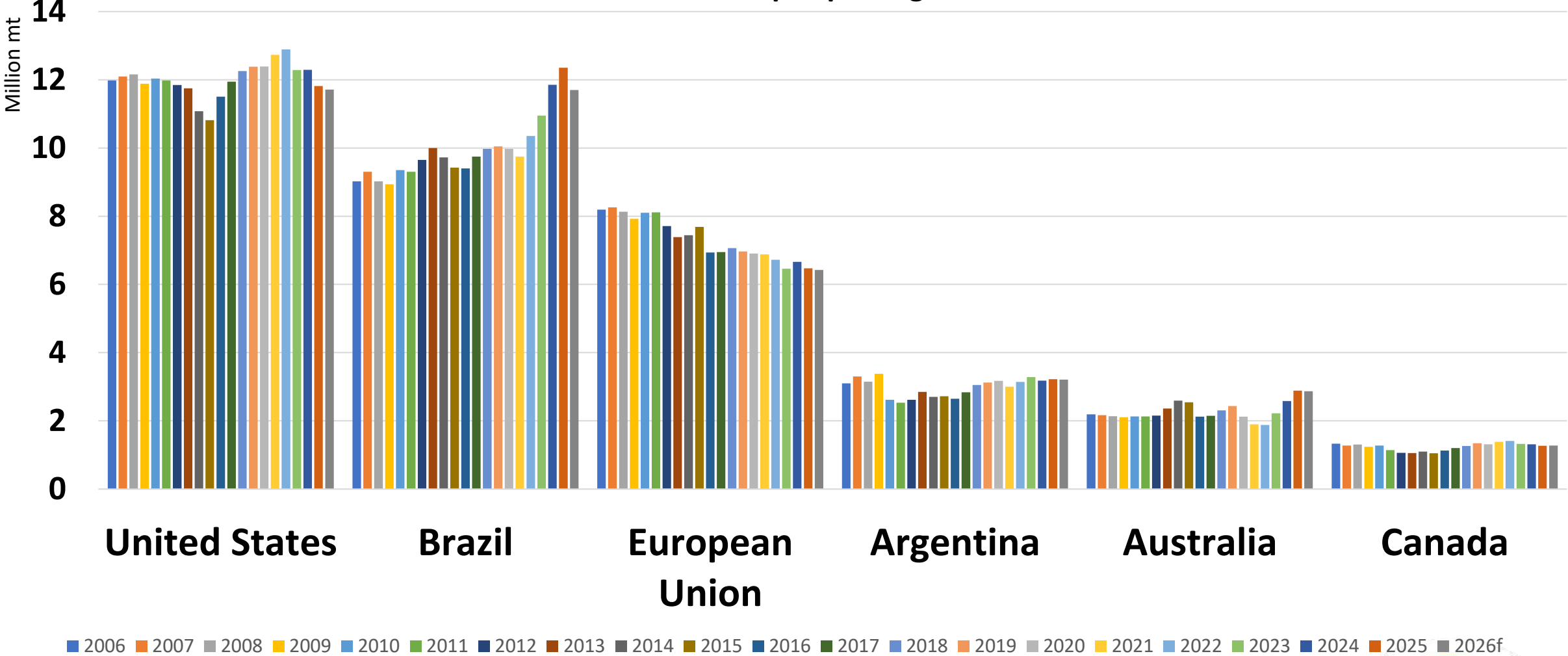


Global production changes- key drivers for beef

- **Cattle numbers declining in key producing regions of N. America, EU, Australia offset by modest growth in non-traditional regions**
- **Global production peaked aided by carcass weights and liquidation as cycles moves to one of herd rebuilding**
- **US: heavier cattle= higher quality grades and increase lean trim imports**
- **Australia weights also up (positive story re more from less?)**
- **Brazil overtakes US as worlds leading beef producer**
- **US, EU, Australia declines offset by Indian buffalo meat exports that continue to grow**



Beef Production for Top Exporting Countries



Source: USMEF



Australian beef production & carcass weight



Production

Carcass weight

2025f:
2.79mt

2025f:
310kg

2026f:
2.72mt

2026f:
312kg

2027f:
2.67mt

2027f:
320kg

Source: ABS, MLA estimate



Global production changes- key drivers for beef

- **Trade disruption driven by tariff actions causing uncertainty now even the legality of tariffs are uncertain**
- **USMCA agreement re-visited by the Trump administration**
- **US/AUS trade tensions over beef and reciprocity**
- **US/EU trade tensions over beef and pork**
- **Disease threatening global supplies- NWS in Mexico halting feeder cattle into the US. FMD in S. Africa, Lumpy skin, ASF, HPAI**



Global production changes- key drivers for beef

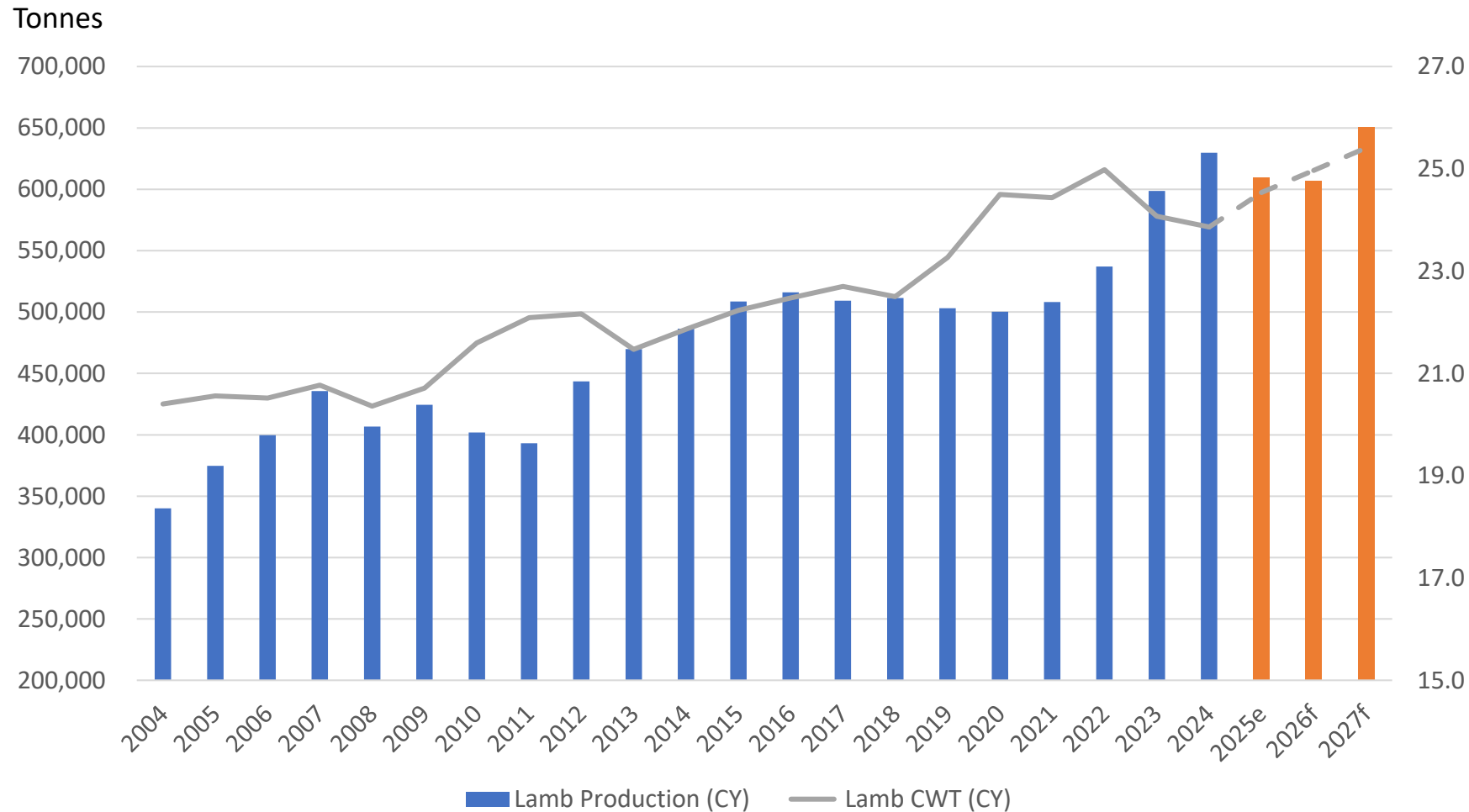
- High packer losses c **\$359/hd** and shut downs- too many hooks v supply
- High margins for cow/calf operations peaking at **\$1100/hd**
- Low feed costs
- Poor dairy margins/dairy beef opportunities
- China seeks to protect domestic industry and grow exports with 55% tariff action, most affected being Brazil (53%) and Australia (19%)- where will this beef be re-directed?
- Beef price and the consumer- Trump



Sheep numbers- New Zealand



Australian lamb production & carcass weight



Production Carcass weight

2025: 610,000t	2025: 24.5kg
2026: 607,000t	2026: 25kg
2027: 651,000t	2027: 25.4kg

Source: ABS, MLA Forecast



Global production changes- key drivers for lamb

- **Production is generally stable overall but this masks falls in key traditional producing regions inc NZ and EU**
- **Weak expansion elsewhere inc MENA/African regions**
- **Demand relatively strong despite price hikes**
- **Disease threat is a concern inc LSD, Bluetongue, FMD**
- **Sector profitability drives shift to other species/activity**
- **Pressure on the live trade, banned 2028**
- **Growing demand for halal products both domestically, EU and wider present opportunity**



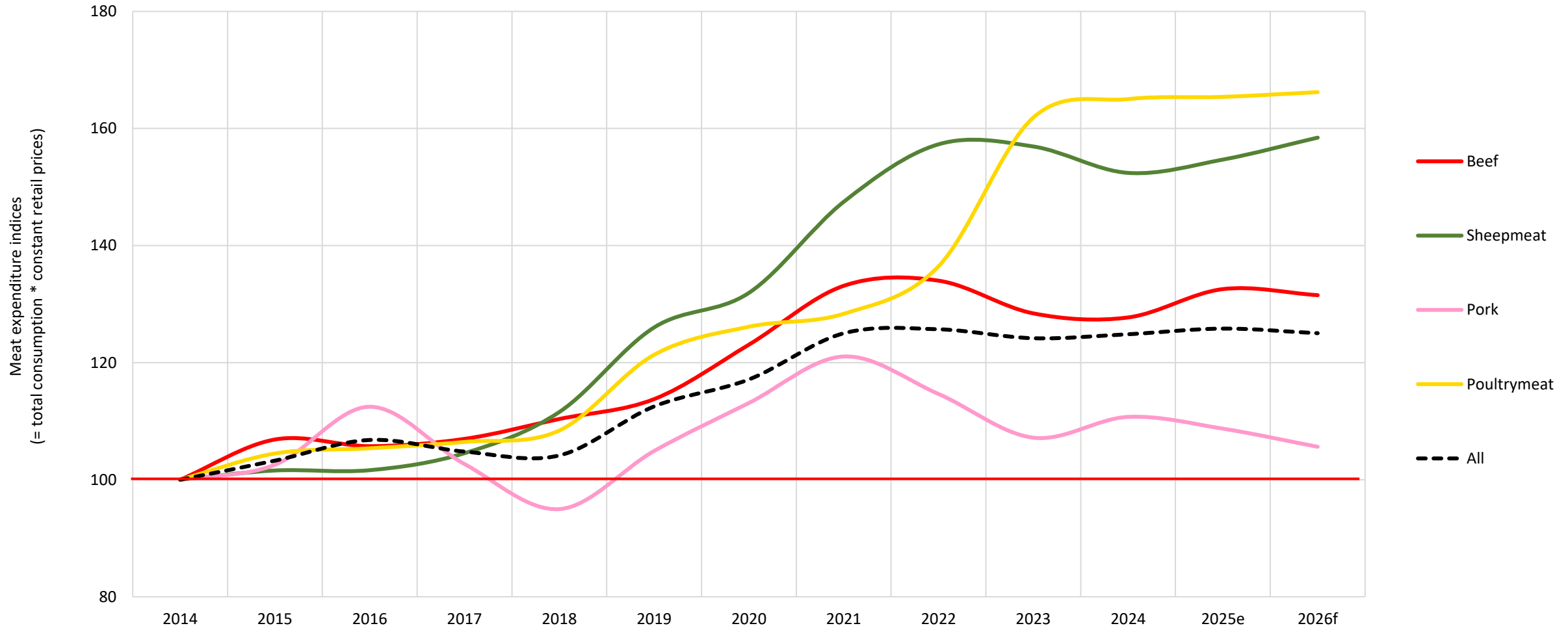
Global production changes- key drivers for pork

- **Global production remains relatively stable**
- **Disease remains a real threat to global and regional production**
- **China ASF cases had significant impact to global production**
- **ASF in Europe has hit the sector hard**
- **Germany remains ASF impacted**
- **Spain current ASF outbreak is hampering trade although not to China**
- **PRRS in N. America still persists**
- **Brazil increasingly focused on export markets**
- **China has its own export ambitions**
- **Higher prices for protein favour cheaper pork**



Meat expenditure index, 2014 (base 100)-26f

Global Meat Expenditure Indices: constant LC, 2014-2026f



Source: Gira compilations and forecasts

Weighted by consumption (countries covered varying by species)

GLP1 and protein



- Increasing use in the UK 4%.1: US 12%, 20%+ in 2026?
- Getting cheaper, more accessible, tablet form
- Decreases calorie intake by 40%
- Changes purchase habits with positive swing to fresh/protein



Conclusions

- **Production patterns are changing with livestock decline in traditional regions and increases elsewhere**
- **Landscape is politically volatile so potential trade disruption is ever present, inc to the MENA region which has been an opportunity**
- **Animal disease challenges are increasing**
- **Labour- both on farm and processing- smart tech/AI/Auto?**
- **Inflation is exerting downward purchase pressure & switching**
- **Out of home consumption remains price sensitive**
- **Sustainability challenges continue**
- **Trade is no longer guaranteed so efforts to stabilize/grow Scottish herd is a positive step**



Conclusions- on the positive side

- Attitude to red meat proteins are moving positively
- Interest in alternative/plant based has waned, as has noise
- Demand remains robust despite higher prices: **new norm**
- GLP-1s are also likely to increase protein demand for users and retailers are responding to this demand shift
- EU discussions should ease the trade in goods
- Scotland has strong consumer recognition domestically & in wider markets so efforts in high value regions has opportunity (Quality v Quantity)



Acknowledgements

- **Beef + Lamb New Zealand**
- **GIRA**
- **Meat and Livestock Australia**
- **Quality Meat Scotland**
- **US Meat Exporters Federation**





MEATING OUR POTENTIAL

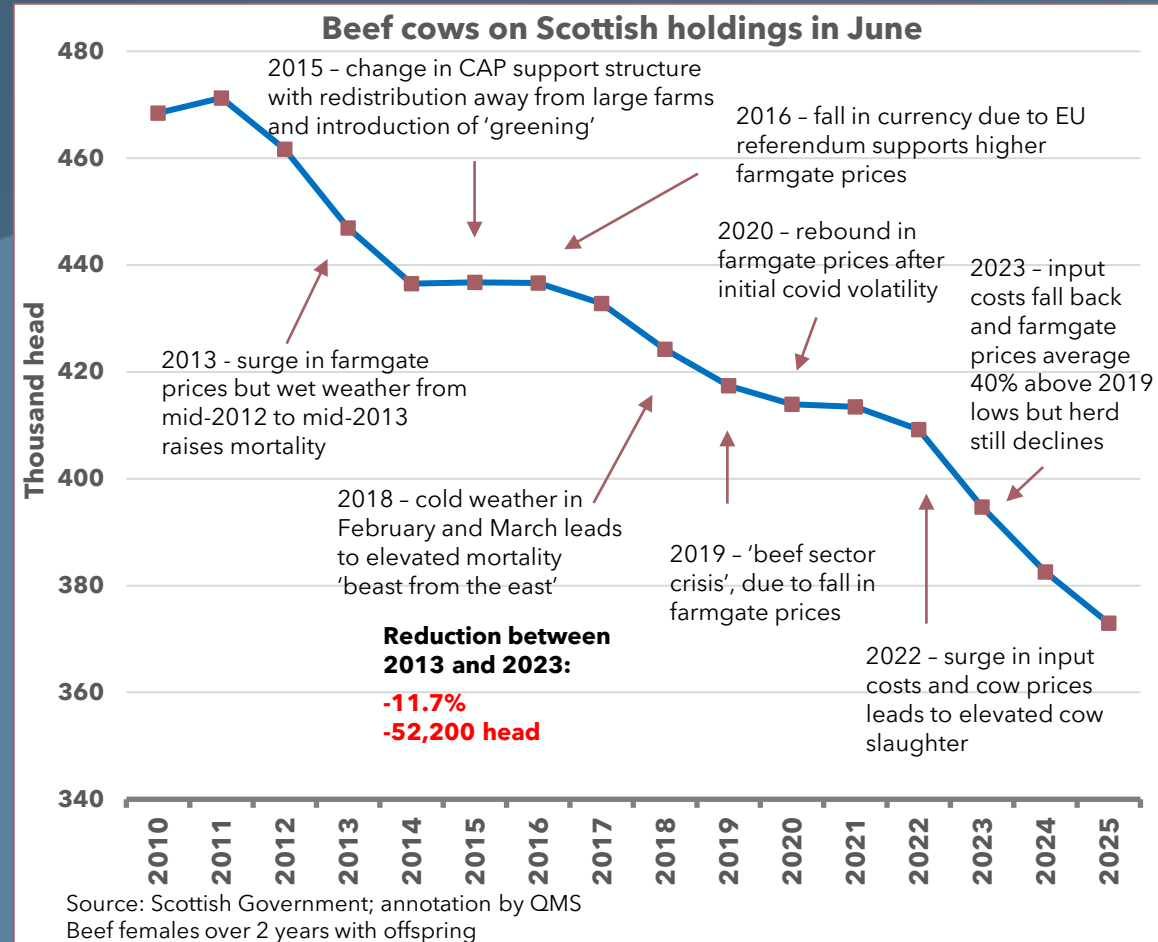
NEXT STEPS FOR SCOTLAND

10 MARCH 2026

Where we started...



The background – declining suckler herd



The background – key influences on farmer decision making

Top three Concerns:

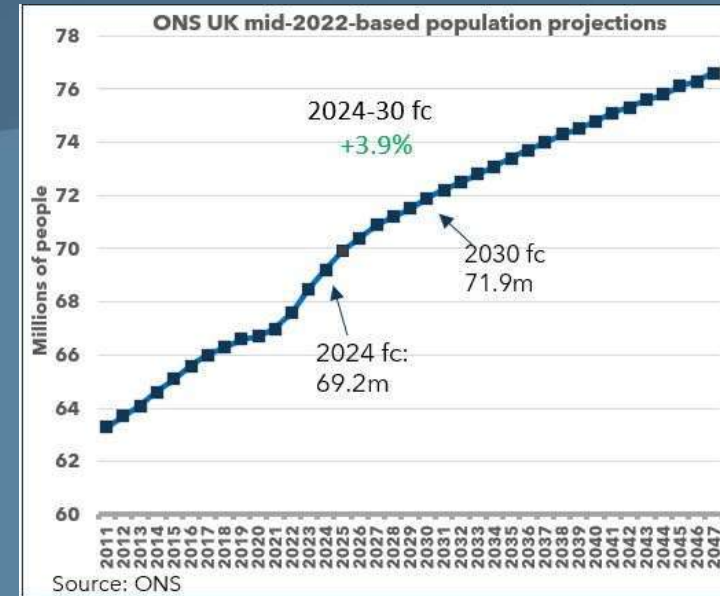
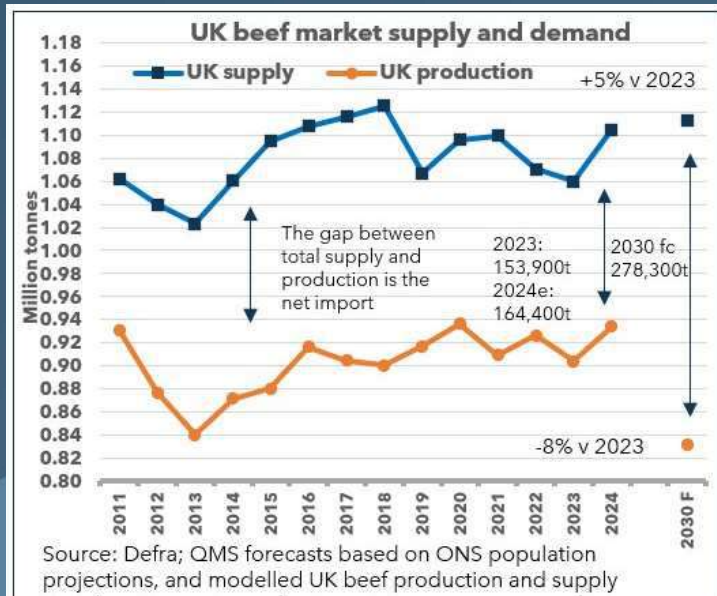
- The profitability of the business
- Wanting to be less reliant on subsidy
- The cost of labour

Other important issues for those moving away from beef cows:

- Lack of succession plan
- Want an improved work:life balance
- Personal or close family member's health

 Businesses increasing their herd tended to be less reliant on off-farm income

The QMS modelling



UK beef sector modelling to 2030

- Projection of slight drop in per capita beef consumption
- Growing population over next 5 years
- 8% projected fall in beef production
~4% rise in supply requirements
- Increase in net imports to more than 278k tonnes (up 81% from 2023)

The Scottish economic opportunity to maintain current (2023) levels of self-sufficiency in 2030

- Production needs to increase by 6%
- Additional 22k tonnes beef (79k breeding cows)
- Potential to generate £281m of output and £76m GVA

Meating Our Potential



Campaign aims

1. **Raise awareness of the Scottish economic opportunity** from the realistic growing global demand for beef and lack of supply, amongst the red meat sector and political decision makers
 2. **Highlight the risks and realities of our currently estimated downwards trajectory** of Scottish beef production, including the negative impacts this has on food security, our economy and environment
 3. **Gather positive support from our three key audiences (industry, government and citizens)** to inspire confidence in growing our production capabilities and, ultimately, mitigate increased reliance on imported red meat from elsewhere
-

3 equally important work streams



Politicians and decision makers

- Meeting Our Potential pledge to *'feed our growing nation with locally produced, sustainable red meat'*
- On-farm industry partnership public affairs programme with MPs, MSPs, candidates and councillors
- Informing policies that place barriers on herd growth / livestock production



Primary producers / trade industry

- Insight-led producer programme to support productivity, profitability and growth and boost confidence to invest in future:
- Digital hub with resources, case studies and tools
- Alignment of knowledge exchange activities around key themes.



90% of Scottish red meat consumers surveyed said they would prefer to buy Scottish beef, lamb or pork, even if red meat imported from elsewhere was 30% cheaper

Citizens and consumers

- Regular campaign of 'headline grabbers' that resonate with the masses
- Used planned hooks and events to generate news opportunities

Meating Our Potential Campaign

Impact so far

Raising our profile...

2 Front page / homepage features

5 Key trade attendance at forum

Headline grabbing press releases:

A couple more cows per herd

Strong consumer preference of Scottish red meat over imports

Home grown or handed away: let's back local red meat over imports

Strong early support for campaign

100%
Key message penetration

3.02m+
Opportunities to see

4
Broadcast interviews



Engaging producers..

15.5k

additional followers
reached

Through shares &
positive comments

153k+

Overall reach

Across all campaign
social media posts



Meating Our Potential
producer support hub:



3 practical modules: productivity, profitability, growth

-  Business support tools
-  Helpful signposting
-  Video case studies
-  FAQ
-  Topic sheet
-  Economic modelling paper

200

'likes' on Facebook

On initial social media post

500

visits

On dedicated webpage

37.5k

users reached

1k

interactions

Amplifying the evidence

30 key senior stakeholder pledge signatories



Engaging our decision makers

11 MSP / MP signatories

3000+ political stakeholders reached

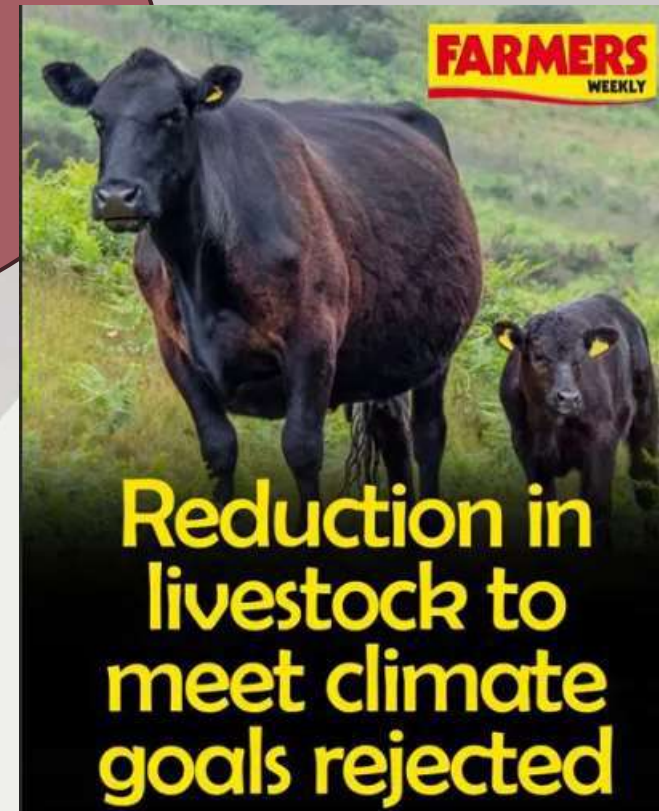
11
visits

8
regions



“Let me be crystal clear: this government has no policy, and will have no policy, to cut livestock numbers.”

Mairi Gougeon MSP



Public affairs – CCP last week!

"The Scottish Government has chosen an alternative balanced pathway to net zero from that of the Climate Change Committee and it has chosen not to reduce livestock numbers, as was suggested by the committee. That seems to be for good reason."

- **Bob Doris, MSP (SNP)**

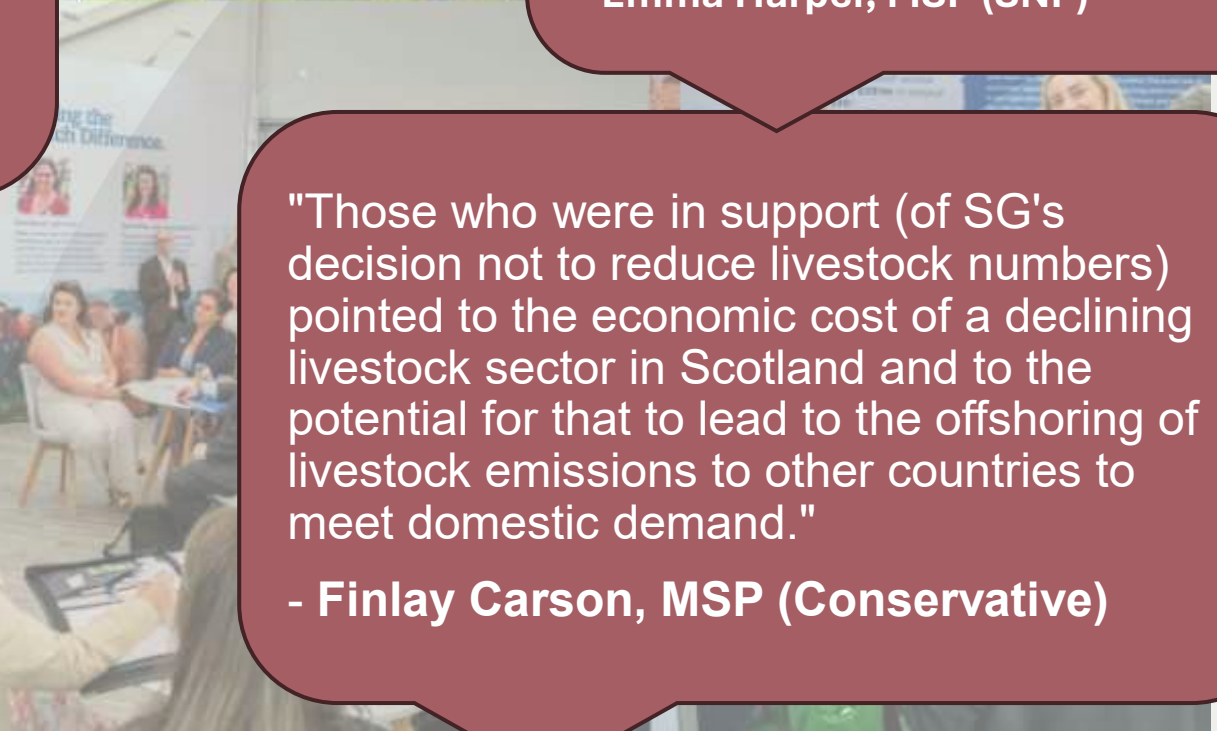


"Around good food nation plans... using local food producers and agribusinesses in public and private sectors helps reduce emissions, means generally healthier food and keeps more money in local economies."

- **Emma Harper, MSP (SNP)**

"We need to have a public conversation about the environmental impacts of imported food... we need to support our domestic producers."

- **Sarah Boyack, MSP (Labour)**



"Those who were in support (of SG's decision not to reduce livestock numbers) pointed to the economic cost of a declining livestock sector in Scotland and to the potential for that to lead to the offshoring of livestock emissions to other countries to meet domestic demand."

- **Finlay Carson, MSP (Conservative)**

Overall impact

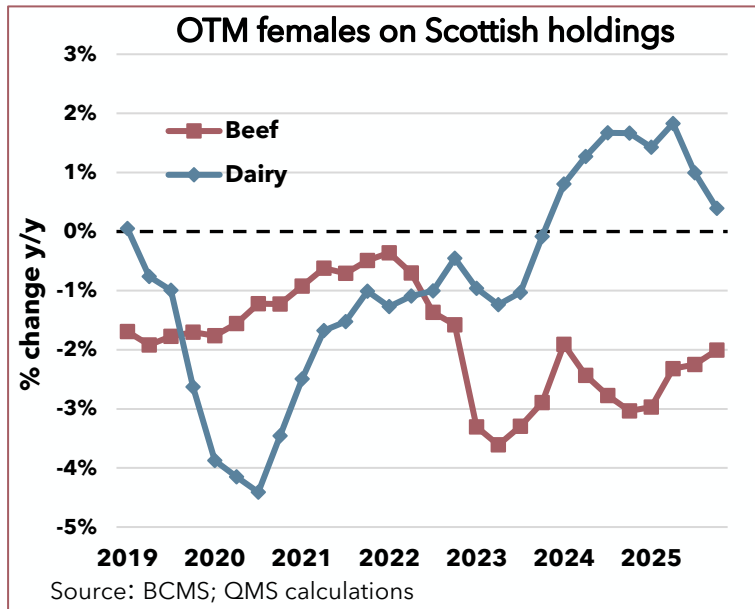
Raising awareness surrounding economic opportunity with industry and other critical audiences (reaching more than 3m) ↑

Scottish Government rejecting Climate Change Committee recommendation to reduce cattle numbers ↑

Very positive public endorsement from UK and Scottish Government political leaders and influencers ↑

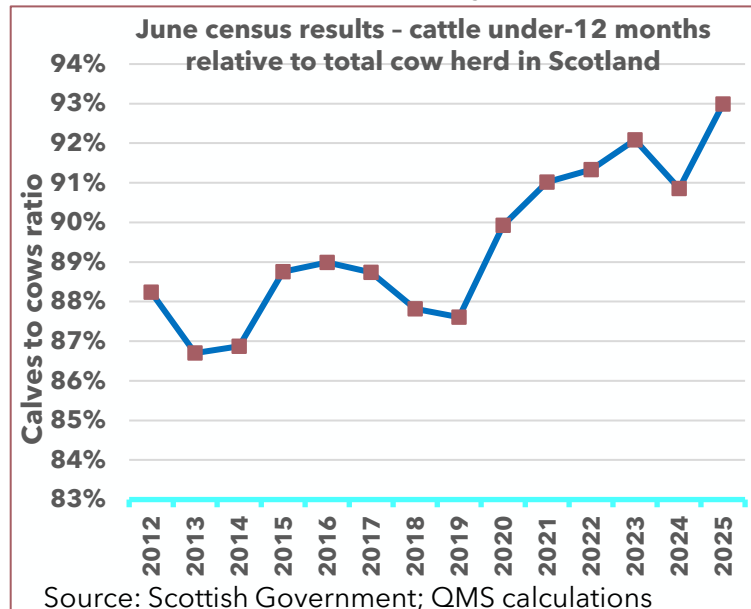
Meating Our Potential Indicators

Breeding herd



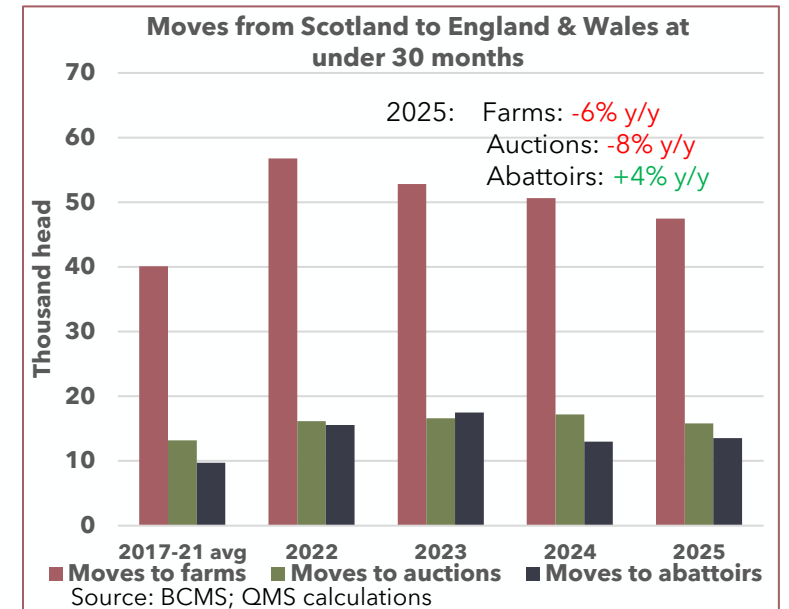
Red: Beef herd decline has slowed, but numbers are still falling at a 2% annual rate as of October 2025

Productivity



Green: Calf numbers relative to beef and dairy cows in the June census jumped higher in 2025, likely reflecting lower mortality due to good spring weather. Three-year average for 2023-25 higher than 2020-22 (92.0% v 90.8%)

Outflow



Note: some moves to farms are effectively slaughter moves, with the cattle being processed shortly after arrival in England



Amber: The level of outflow to England & Wales has slowed further, although it does remain elevated above pre-2022 levels

So, what next?



Shifting focus – awareness to support



Industry support

- ‘Cutting edge roles in red meat’ sister campaign to tackle critical labour challenge
- Ongoing practical support to primary producers / trade through on-farm and industry events updates to digital producer hub
- Cows in the Community (NBA)



New species

- Sheep sector socio-economic modelling
- Targeted communications and engagement campaign
- And what about the pig sector.....



UK collaboration

- Add further momentum and weight to campaign by evolving into a GB-wide conversation.

Key takeaways

- We have a £400m opportunity just from the beef sector alone by 2030.
- Recognise we all - industry, government, citizens – have a role to play

**The future will not forgive us for
not trying.**



Keynote address

12:00

Mairi Gougeon

Cabinet Secretary for Rural Affairs, Land Reform and
Islands

The red meat market

13:20

- Lesley Ann Gray, Strategic Insight Director Scotland, Worldpanel by Numerator
 - Emma Heath, Marketing Director, Quality Meat Scotland
 - Richard Wood, Category Director of Meat, Fish, Eggs & Poultry, Tesco
 - David Millar, Scottish Chef of the Year 2025 and Executive Chef, Carlowrie Castle
 - Tom Gibson, Business Development Director, Quality Meat Scotland
 - Panel discussion
-

Exploring current Food Trends and opportunities for the Red Meat Industry

2026 QMS conference

Lesleyann.gray@wp.numerator.com



Today I'll be talking about..

The performance of red meat in Scotland compared to GB and how the shopper is changing



Health – how it is disrupting how we shop. The latest on protein, GLP1, Ultra processed and what does this all mean for red meat?



How are our consumption habits changing in the home and what are our predictions for 2026?



My reference sources for today

Purchase Panel

From 30k to 55k households in 2026

Usage Panel

40,000 diary weeks a year for every member of the household. Link to what we shop, removing the claimed behaviour

Nutrition service

Nutrient Tracking

Health Scores (NPM)

Shopper Attitudes and Behaviours

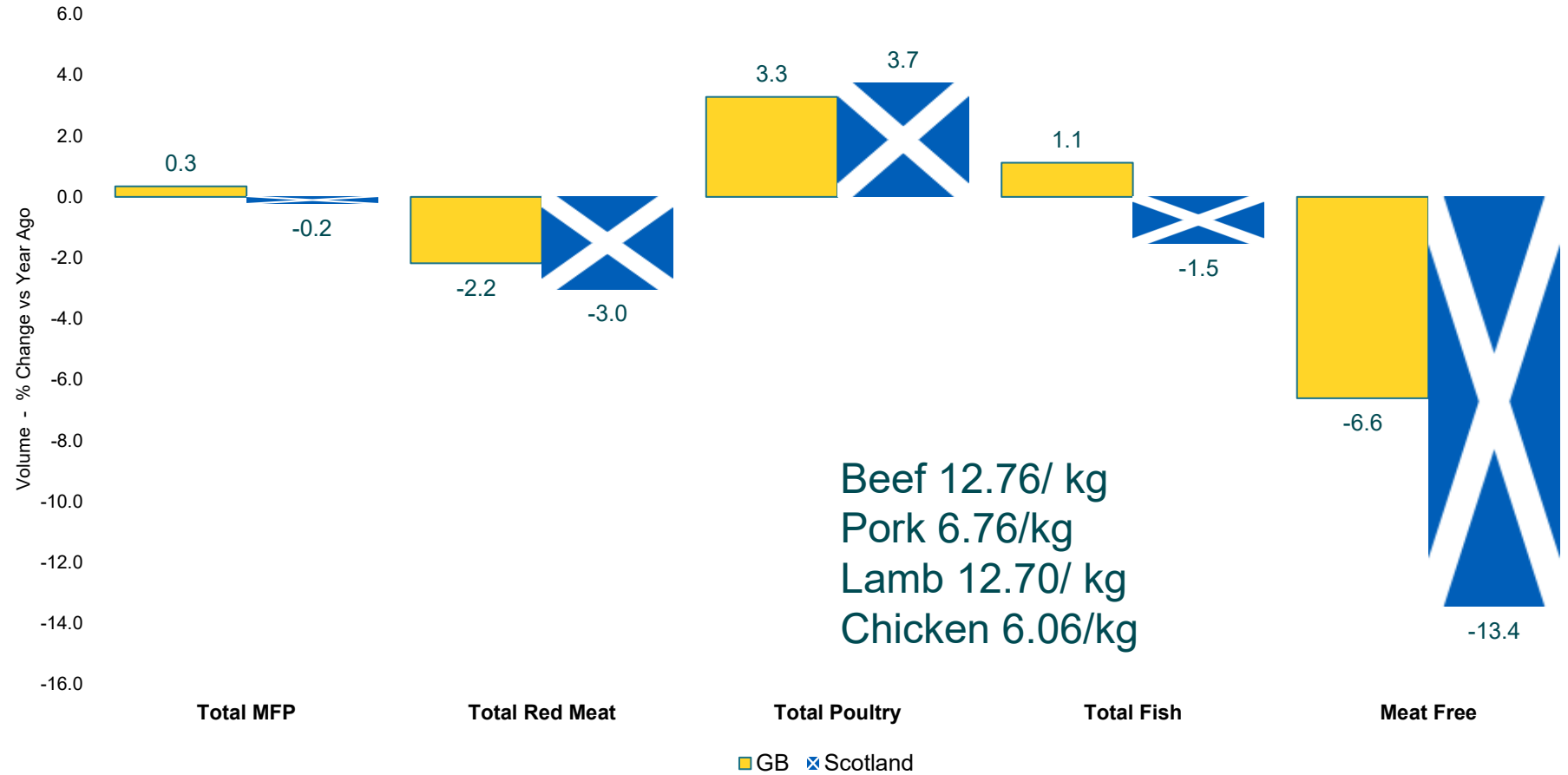


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The performance of red meat in Scotland

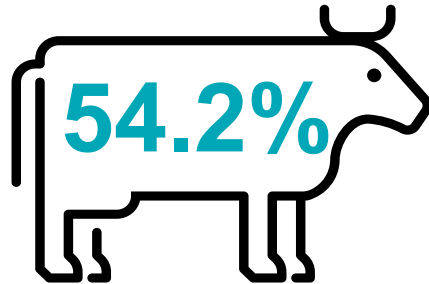


Scotland's red meat volume is declining just slightly behind GB. The higher growth in Poultry was driven by growth in Chicken Breasts.



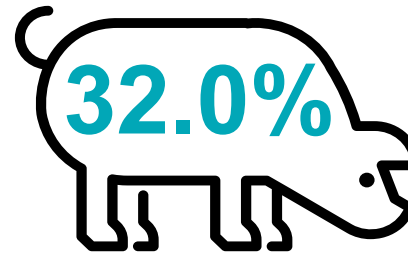
Primary Red Meat

Beef continues to dominate and Scotland share is higher with positive value and volume growth in lamb.

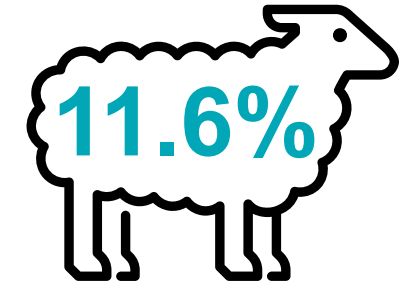


Volume -8.2%
Spend 10.4%

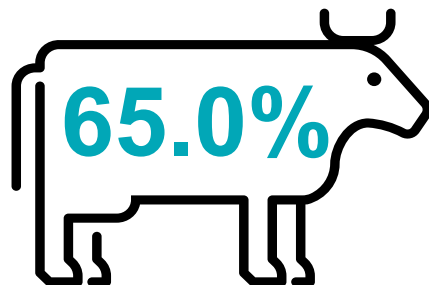
Volume share %



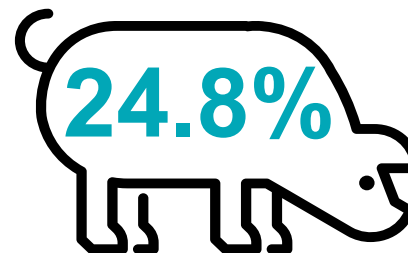
Volume +0.8%
Spend +3.4%



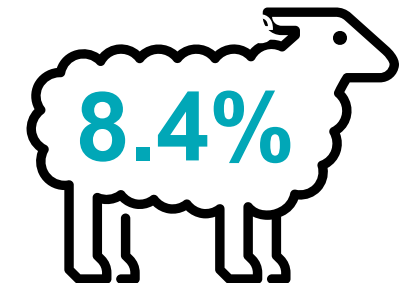
Volume -8.9%
Spend -5.0%



Volume -5.4%
Spend +12.8%



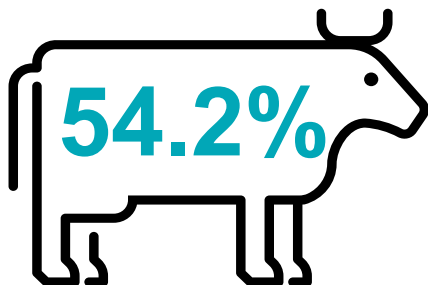
Volume -1.1%
Spend +1.3%



Volume +2.9%
Spend +10.6%

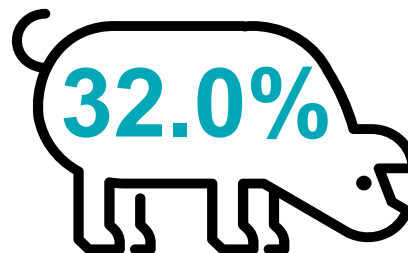
The growth in lamb continues in the latest 12 weeks.

Primary Red Meat

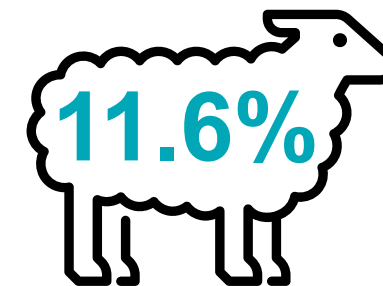


Volume -8.2%
Spend 10.4%

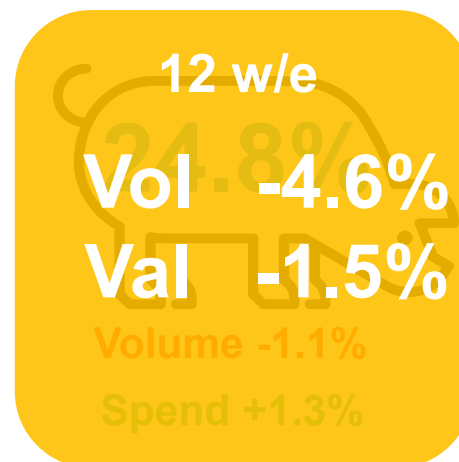
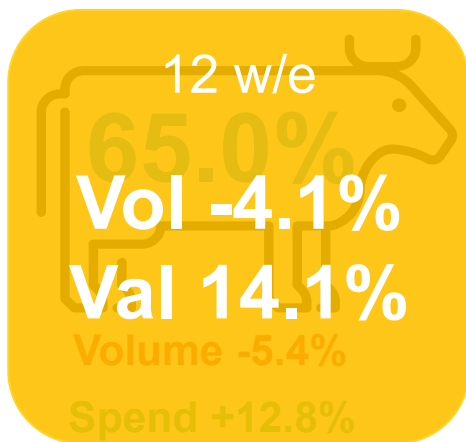
Volume share %



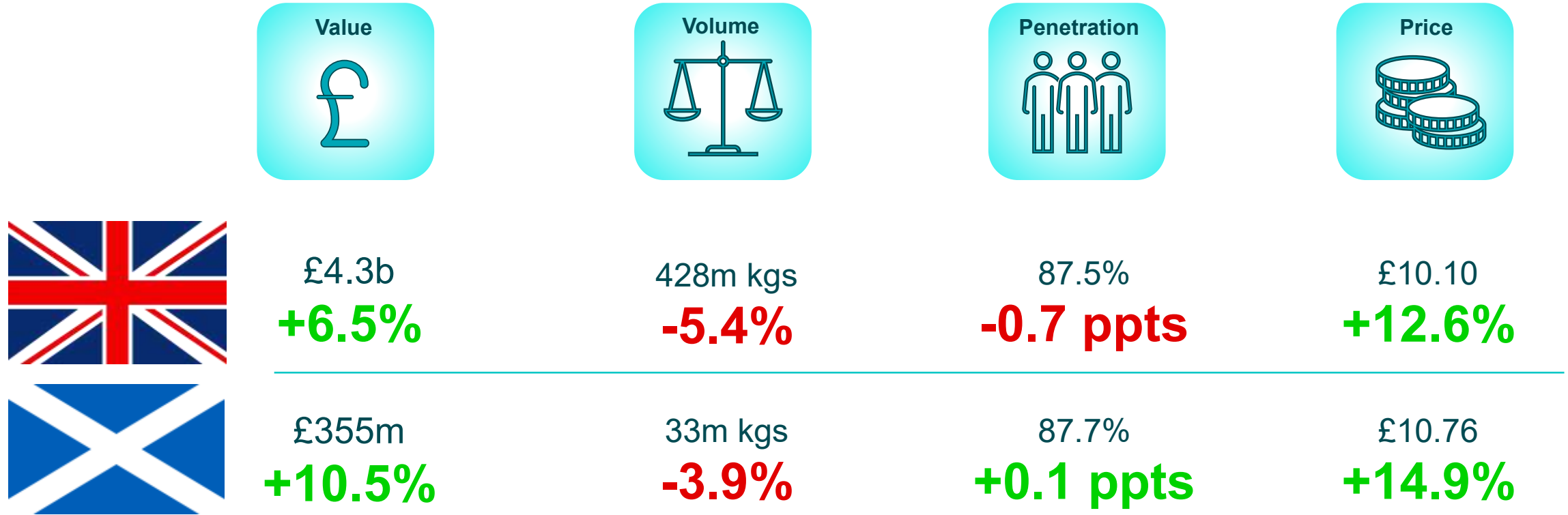
Volume +0.8%
Spend +3.4%



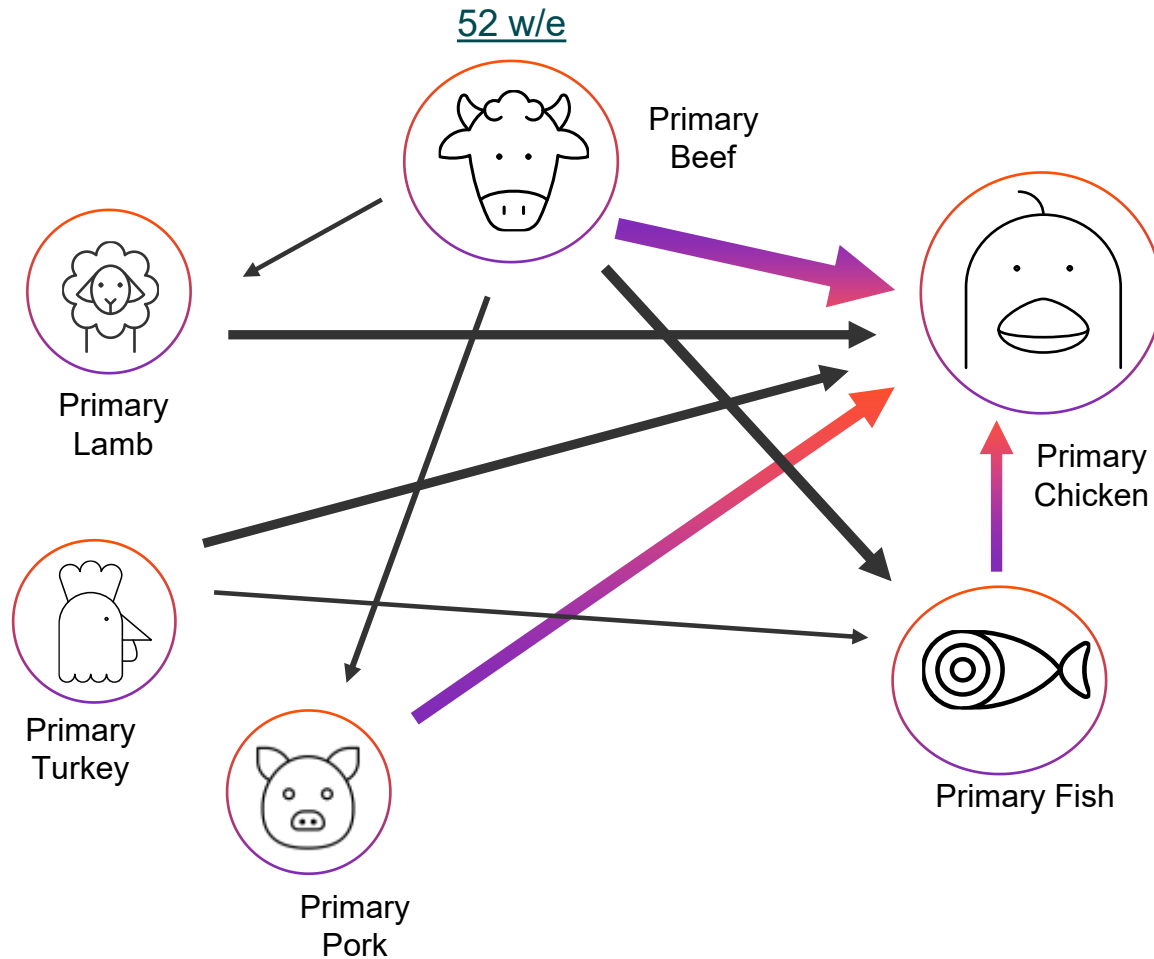
Volume -8.9%
Spend -5.0%



Continued price rises have resulted in volume declines across both regions, despite penetration increasing in Scotland



Chicken is gaining from all proteins but Pork also gaining from beef.

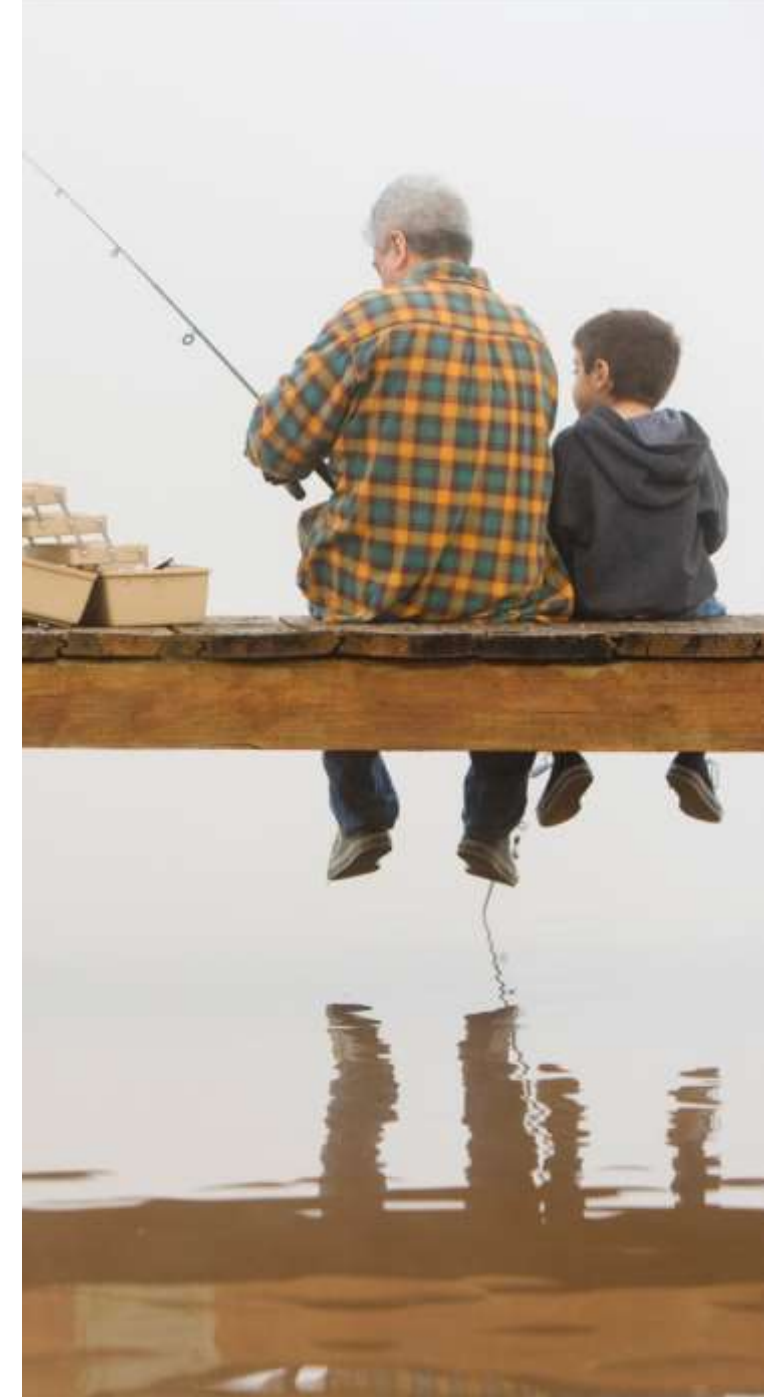
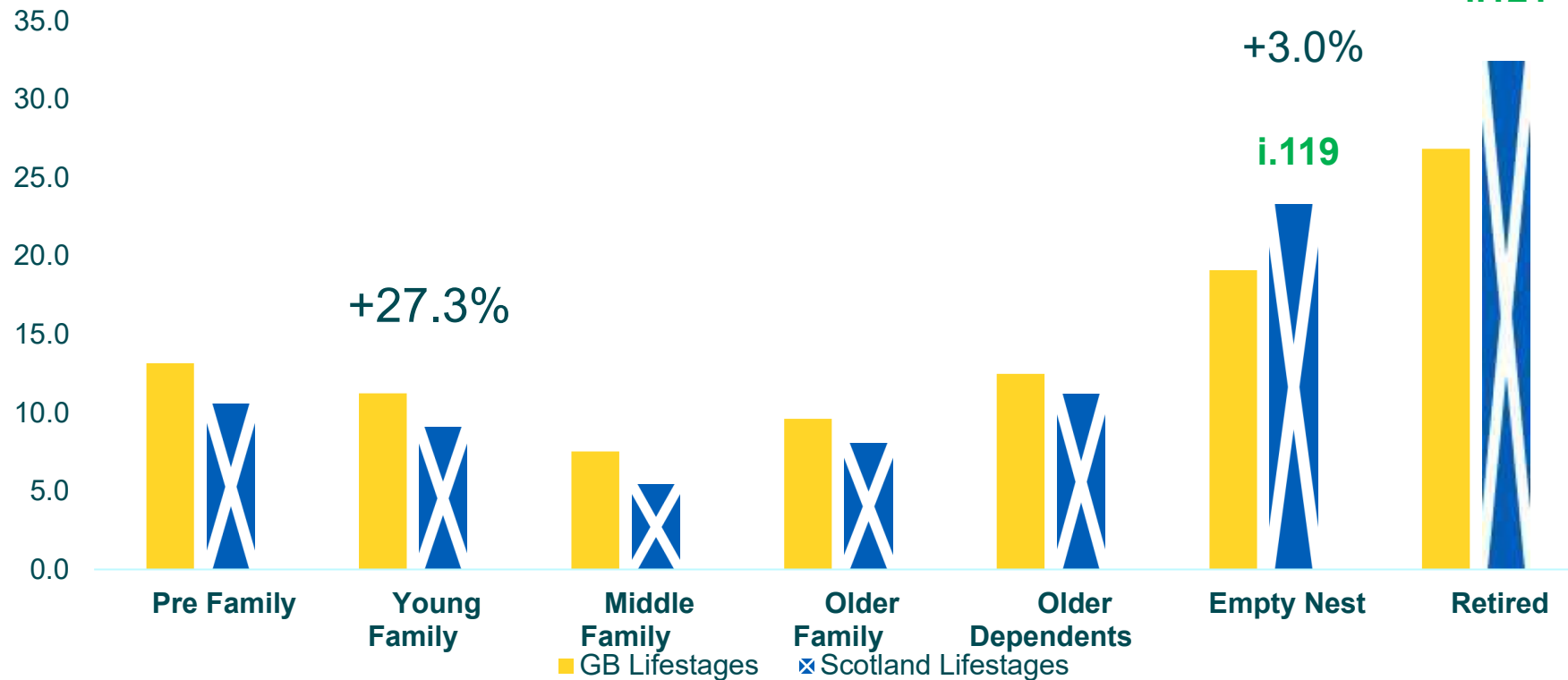


Pork has gained some switching from beef (135.2k kgs), however chicken is seeing the biggest gains from all proteins

Is there an opportunity to make more of pork?

Retired shoppers remain our largest demographic, and we are more reliant on their purchasing than GB

Primary Red Meat Demographic Volume Share %



2

Health – the new Disruptors

We know consumer sentiment is strong – we want to be healthier, lets explore these 4 disruptors...

‘Adding good stuff’ is a key, growing part of Health



UPFs: shoppers want to cut back and are already doing so.



Weight-loss drugs: usage has nearly doubled within a year.



HFSS legislation comes to Scotland in October 2026 and is already impacting baskets



When it comes to Health, we have seen growth led by ‘Positive Health’ – where we actively include beneficial ingredients into our diet

**Positive Health
(‘Adding Good Stuff’)**

24.3% for Total
Food & Drink
(+0.4ppts YoY)



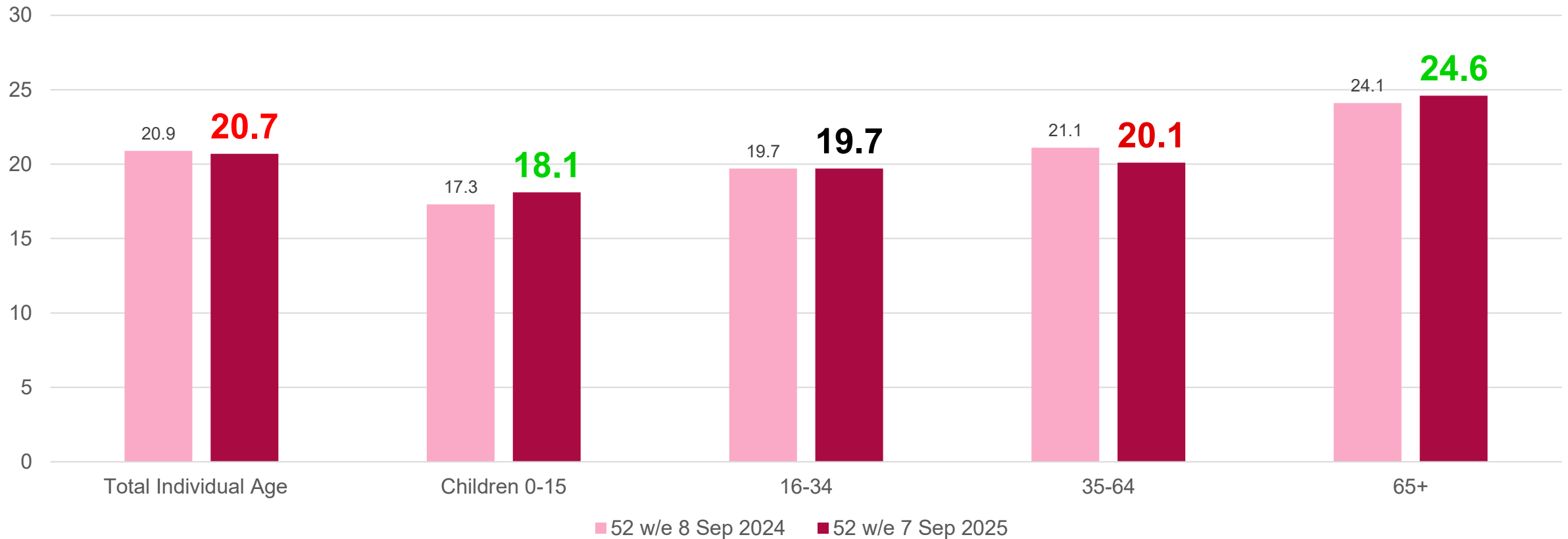
**Managed Health
(‘Remove Bad Stuff’)**

6.5% for Total Food
& Drink
(Flat YoY)



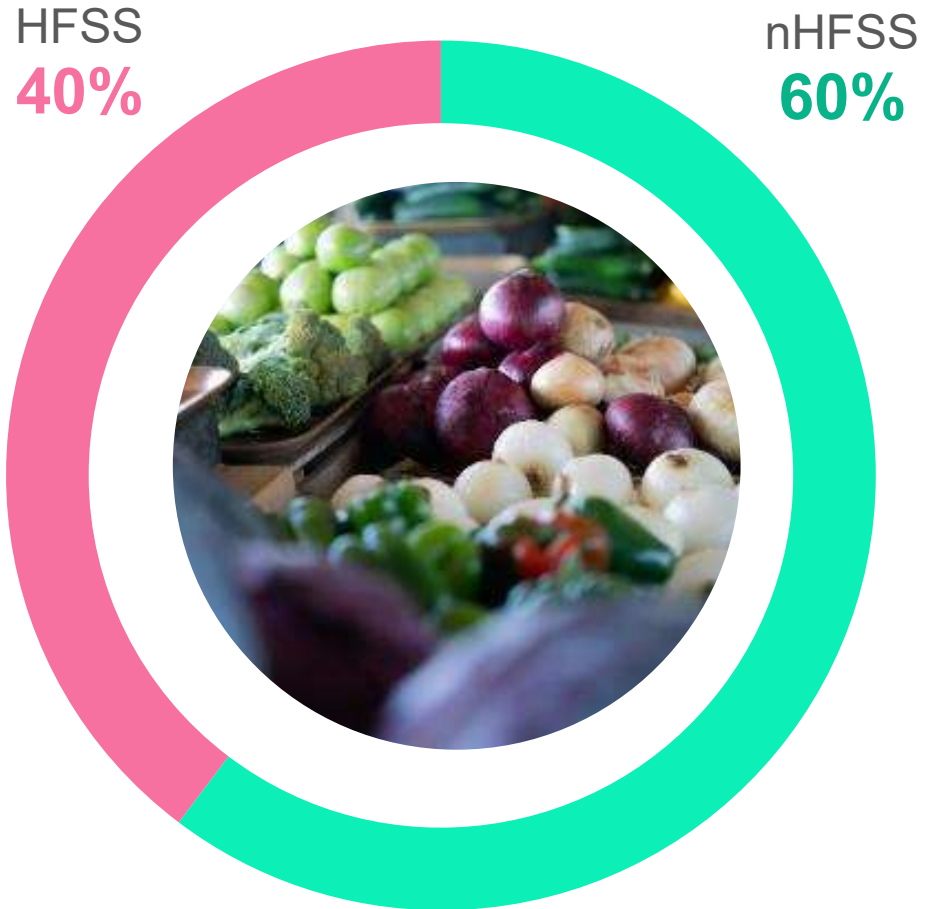
For MFP, the it is the youngest and oldest groups are growing their engagement with MFP for Health reasons. How can we engage them on their journey and dial up the positive message for red meat?

% of MFP Servings for Health Reasons

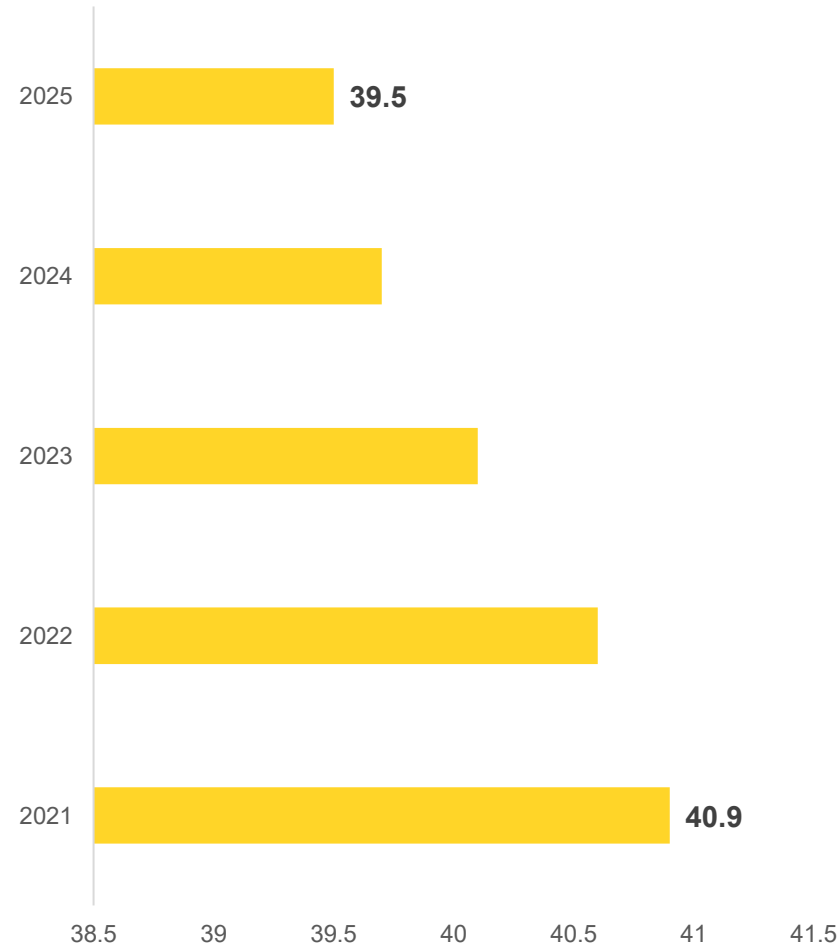


Our baskets are becoming less reliant on HFSS (less-healthy) products

Share of Total F&D Value



Share of HFSS



Healthier Products

67%
Share of F&D growth

+17.7%
Increased Spend

Usage of weight-loss drugs has almost doubled within a year.


4.1%

of GB households have a current user of GLP-1 Agonist drugs.

Up from 2.3% in 2024.

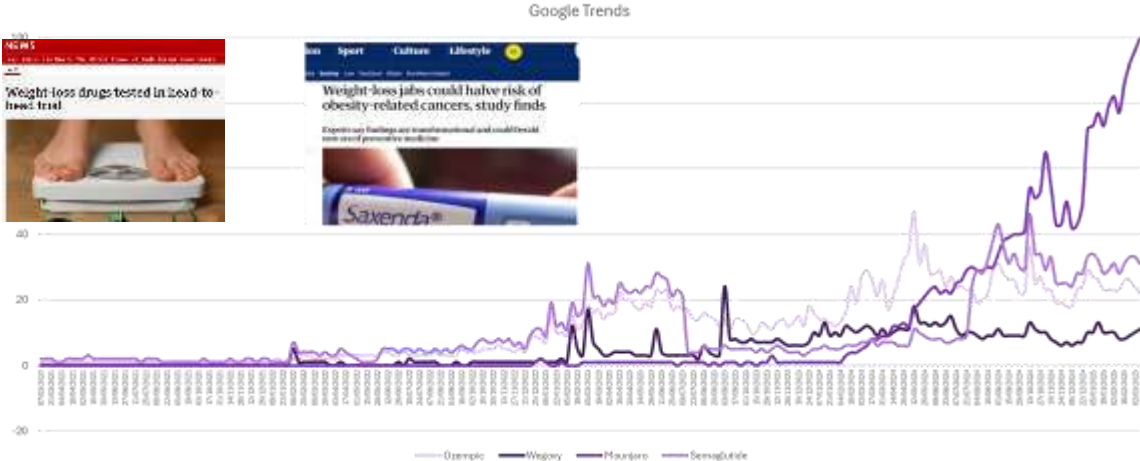
The UK government's strong support of weight-loss drugs means use is likely to accelerate. Politicians are heralding them as a route to boost the NHS and the economy

“New weight loss medicines “could be **very important** for our economy and for health”



Worldpanel by Numerator

Health Webinar 2025 – MFP | 44



And this use of weight-loss jabs is changing our food habits.

Some of the habit changes GLP-1 Agonist users report...

64%
snacking less

74%
reducing takeaways

63%
cutting back on pizza

The overarching impact of GLP-1 Agonists is a shrunken grocery basket

-2.2p.p.

Food & Drink spend decline (Users vs. Non-users)



Retailers are already engaged with this.

Co-op - Good Fuel Range

New In
NUTRIENT DENSE
 Nutrient Dense Berry Bliss Bowl
 200 g

Asda – Protein power pots

Sainsbury's – Small but Mighty Range

Chilled
 Worldpanel by Numerator

Chilled
 Worldpanel by Numerator

Morrisons – Applied Nutrition Range

On Offer

<p>New</p> <p>LIFE 30+ ★★★★★ (1) Applied Nutrition GLP-1 Friendly Chicken Casserole Buy 3 for £8.50 - Online Exclusive 280g (£13.39 per kilo) £3.75</p> <p>Add</p>	<p>New</p> <p>LIFE 30+ ★★★☆☆ (0) Applied Nutrition GLP-1 Friendly Sweet Potato Cotta... Buy 3 for £8.50 - Online Exclusive 280g (£13.39 per kilo) £3.75</p> <p>Add</p>	<p>New</p> <p>LIFE 20+ ☆☆☆☆☆ (0) Applied Nutrition GLP-1 Friendly Spaghetti &... Buy 3 for £8.50 - Online Exclusive 250g (£15.00 per kilo) £3.75</p> <p>Add</p>	<p>New</p> <p>LIFE 30+ ★★★★★ (2) Applied Nutrition GLP-1 Friendly Sweet Chilli Prawn... Buy 3 for £8.50 - Online Exclusive 280g (£13.39 per kilo) £3.75</p> <p>Add</p>	<p>New</p> <p>LIFE 20+ ☆☆☆☆☆ (0) Applied Nutrition GLP-1 Friendly Chicken Tikka With... Buy 3 for £8.50 - Online Exclusive 280g (£13.39 per kilo) £3.75</p> <p>Add</p>	<p>New</p> <p>LIFE 20+ ☆☆☆☆☆ (0) Applied Nutrition GLP-1 Friendly Chicken Shawarm... Buy 3 for £8.50 - Online Exclusive 280g (£13.39 per kilo) £3.75</p> <p>Add</p>
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Chilled
 Worldpanel by Numerator

Chilled
 Worldpanel by Numerator

New In **NUTRIENT DENSE** Nutrient Dense Super Seeded Crackers 130 g

New In **NUTRIENT DENSE** Nutrient Dense Super Seeded Oaty Silced Bread 300 g

Chilled/ Ambient

Worldpanel by Numerator

Report/Presentation Name | 21

Desire is for nutrient dense, lighter meals likely to benefit lean proteins



Heightened protein needed to combat muscle wastage



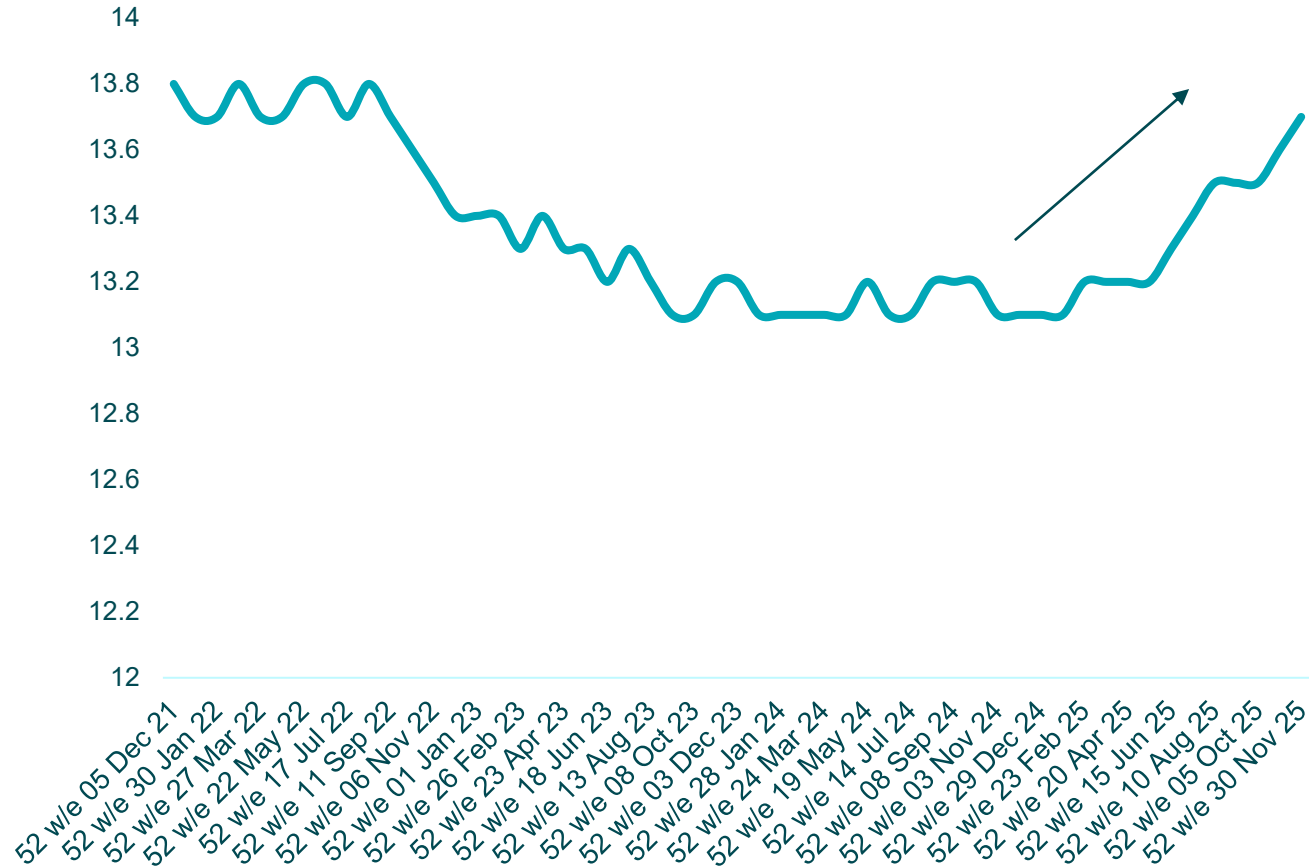
Whilst primary & nutrient dense MFP is unlikely to be among the worst impacted categories it is underperforming. GLP-1 users -7.8% volume and -5.9% value for MFP vs benchmark of -2.2pp for total Food and Drink. **There is an opportunity for pork in this space, more nutrient dense than chicken.**

3

How are our habits changing?

Scratch cooking will continue to rise in 2026

% main meals that are scratch cooked



What's driven the return to scratch cooking?

Lunch (+ 1.0ppt share vs LY)
Family meals at the weekend
and adults midweek

Evening Meal (+0.4ppt share vs LY)
Driven by older families* at the weekend

Predictions for 2026:

Scratch cooking will continue to rise as consumers look for ways to save money.

The shift towards a healthier mindset will also help play a role in scratch cooking's resurgence.

However scratch cooking accounts for only 15% of all meals, convenience versus naturalness will be a key battle ground going forward, and meeting both needs is a strong recipe for success.



Scratch
15%

Assisted
9%

Assembled
62%

Convenience
12%

Takeaway
4%

Fully Homemade

Part homemade

Assembling items

Pre-prepared meals

Ultimate convenience



High involvement

Low involvement

Back on the Table: The Comeback of Traditional Meals

After years of decline the roast dinner is back

Roast
Dinners
+2% vs
LY



Steak
+11% vs
LY



Salad
Meals
+21% vs
LY



Pasties &
Slices
+6% vs
LY



Pasta
Bolognese
+1% vs
LY



Traditional meals are back on the menu for some of us for 2026. drivers will be balancing financial pressures with the want to reduce UPF's and eat "cleaner".

So what? "Help me cook, don't cook for me" – Products should empower not replace.
Think: Clean labels, simple ingredients and intuitive formats

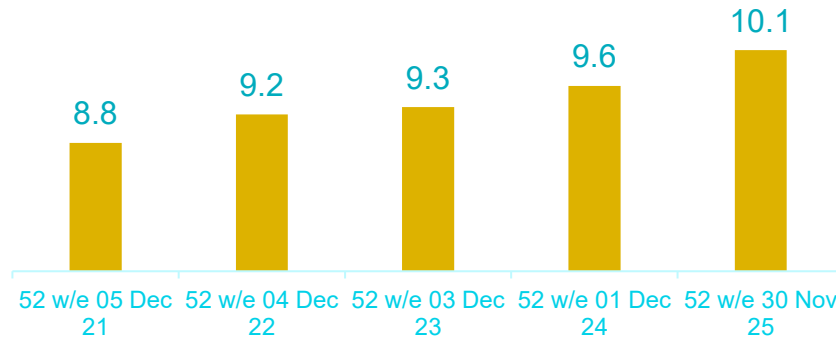
Know thy enemy - chicken will continue to fly. We need to compete

Meat consumption has dropped over the past year, chicken continues to find it's way onto more plates.

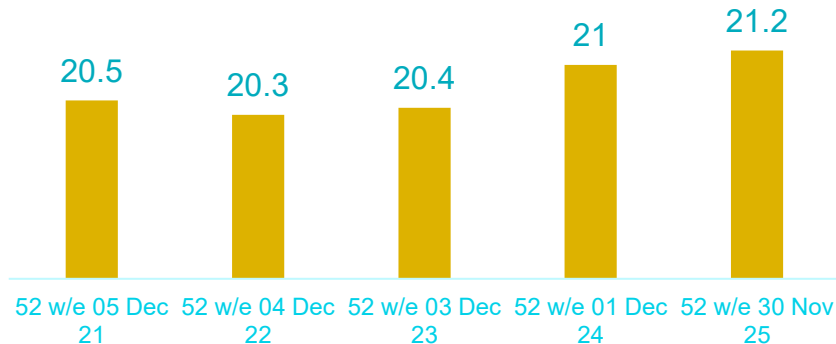
Chicken in our meals has grown by +128m MORE occasions!

(+46m more lunches; +82m more evening meals)

% lunches featuring **CHICKEN**



% evening meals featuring **CHICKEN**



Inflation of other proteins set to remain higher in 2026. Chicken will remain relatively affordable.



Healthier protein in many peoples eyes and popular with younger consumers. **Pork** needs to dial up its health message in this space?



OOH outlets are increasingly featuring chicken options (cost challenge) = more availability/ routine.



Fewer meals out (as expected) could well see meat consumption rise in home to fill that void. Particularly in the evening.

What to focus our NPD on

Big Night In”

Special/treaty evening meals at home



With inflation persisting, the **Big Night In** will continue to grow

+7% vs last year

£1.6bn spent on these meals

Midweek meals growing in importance (+4ppts) as they become normalised

Why will Big Night In continue to grow?

1. With disposable income still under pressure, consumers are likely to look for options at home to manage their budgets.
2. World Cup being hosted in North America this year. The time zone difference will be an influence viewers in the UK to watch the games with friends and family

So What: This creates opportunities for processors to innovate for categories that play at role at these occasions.

Recap of what we looked at today...



Health offers opportunities if the price proposition and communication is correct.



Chicken will continue to fly...



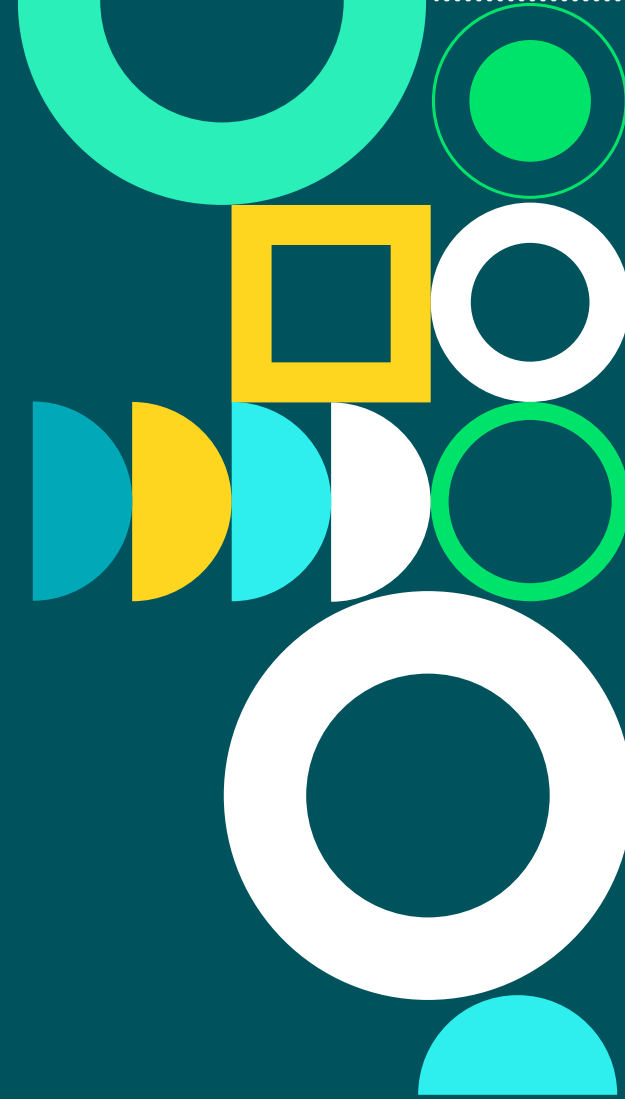
Scratch enjoys a slight renaissance, and traditional meals enjoy a rebound...how can we help them prep and cook and get the most from these meals.




Target occasions such as the “big Night In” and the switch shoppers are making to more in home occasions remembering that Convenience is always desirable.

Lesley Ann Gray

Lesleyann.gray@wp.numerator.com



Bringing Insight-Led Marketing Campaigns to life...



MEAT WITH INTEGRITY



Access to data from the right sources at the right time is key to creating the winning marketing formula for our brands...

“Good marketing makes the company look smart. Great marketing makes the customer feel smart.”

– Joe Chernov



WHEN YOU KNOW, YOU KNOW. Our journey getting people in the know...



2024

LAUNCH AND LEARN



EXPLAIN THE SCOTCH
DIFFERENCE & WHAT'S
BEHIND THE LABEL



2025

SCALE & DEEPEN



DRIVE CONSUMER
CONSIDERATION &
PURCHASE INTENT



2026

EMBED & EXPAND



KEEP THE BRANDS TOP
OF MIND AND MAKE
PEOPLE CARE

Some key insights driving our 26/27 activity



QUALITY ASSURANCE REMAINS A VITAL FACTOR INFLUENCING PURCHASE

Continue to educate on the
Scotch difference

Reinforce the 'look for the logo'
call to action as a marker of trust



RESPOND TO BEEF PRICE INFLATION AND SWITCHING

Highlight different cuts to suit
all budgets

Educate and inspire on the
versatility of red meat proteins



THE IMPORTANCE OF SCOTTISH & PROVENANCE IS STILL GROWING

Build loyalty and embed
provenance values

Activate around the summer of
Scotland and sport

Some key insights driving our 26/27 activity



RECLAIM RELEVANCE AS INTEREST IN 'HEALTH' IS RISING

All proteins are not equal (or natural!) and UPF is a concern...

Communicating the right health benefits to cut through the noise



SCRATCH COOKING IS BACK ON THE RISE

Convenience, speed and indulgence all have their places in meal repertoires

Become a go-to source of recipe inspiration



INCREASED DESIRE TO SHOP AT BUTCHERS BUT WITH SOME MYTHS TO BUST

Personal expertise and passionate service enhance the shopping experience

Demonstrate value, convenience and local as strengths – not just for special occasions

What's coming next? Sustained investment in year three of the WYKYK campaign...



Four key seasonal bursts:

- TV-led campaign inspired by the Summer of Scottish Sport...
- Autumn activity with a spotlight on Pork in October and Lamb in November
- A big splash for the festive season
- New Year Health and Wellbeing focus

Supported by:

- Hard-working consumer PR and tactical opportunities
- Influencer partnerships across a number of 'themes'
- "Always on" paid social (Instagram, Facebook, TikTok)
- Community and sports-led engagement



The standards you
set yourself are the
standards you'll keep.

Sir Alex Ferguson

Thank you



The Red Meat Market: The Retailer Perspective.

Richard Wood – Tesco Category Director, Meat,
Fish, Poultry and Eggs

10th March, 2026



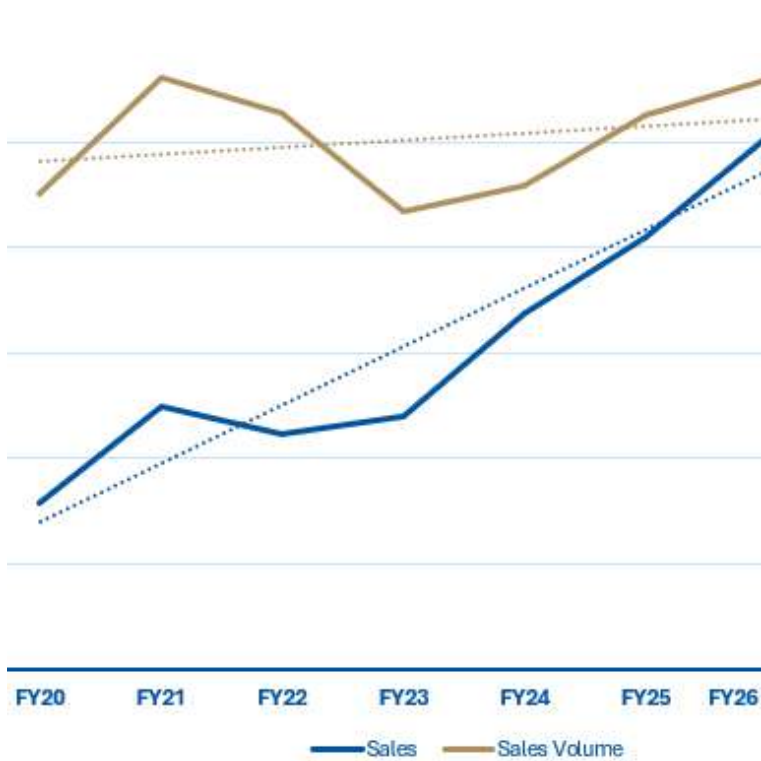


Agenda.

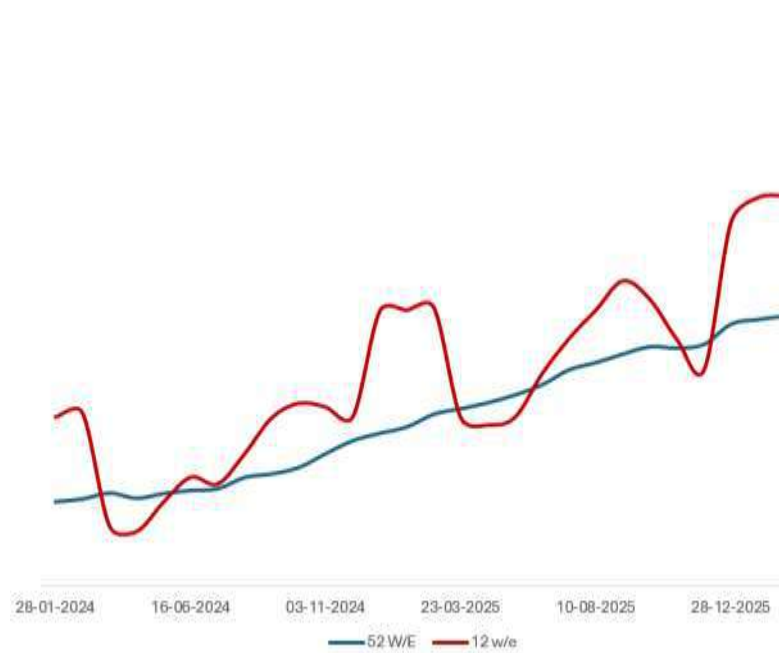
01. Performance update
02. Red Meat is evolving
03. The importance of Scotland
04. Tesco plans for future growth

Meat, Fish, Poultry & Eggs performance.

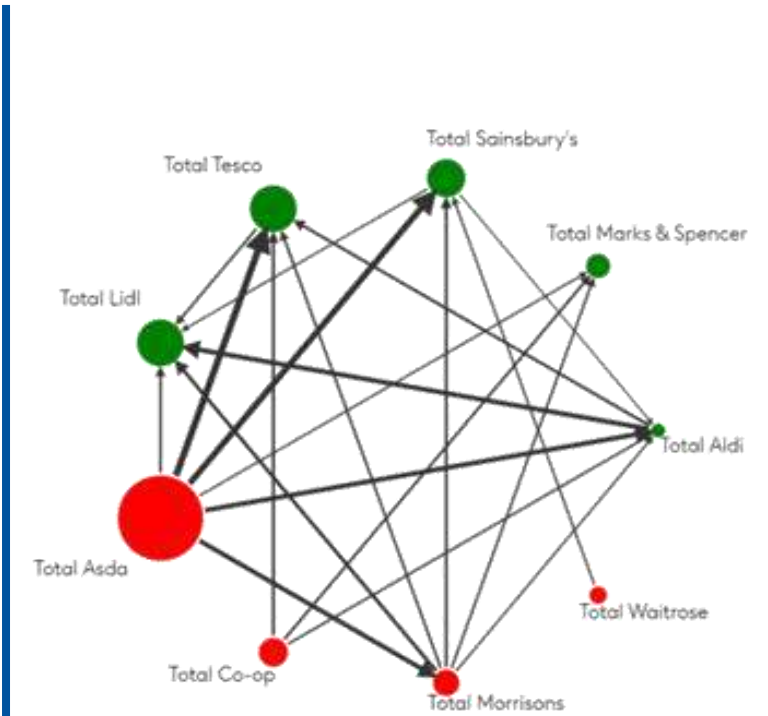
Sales & volume journey



Kantar share growth



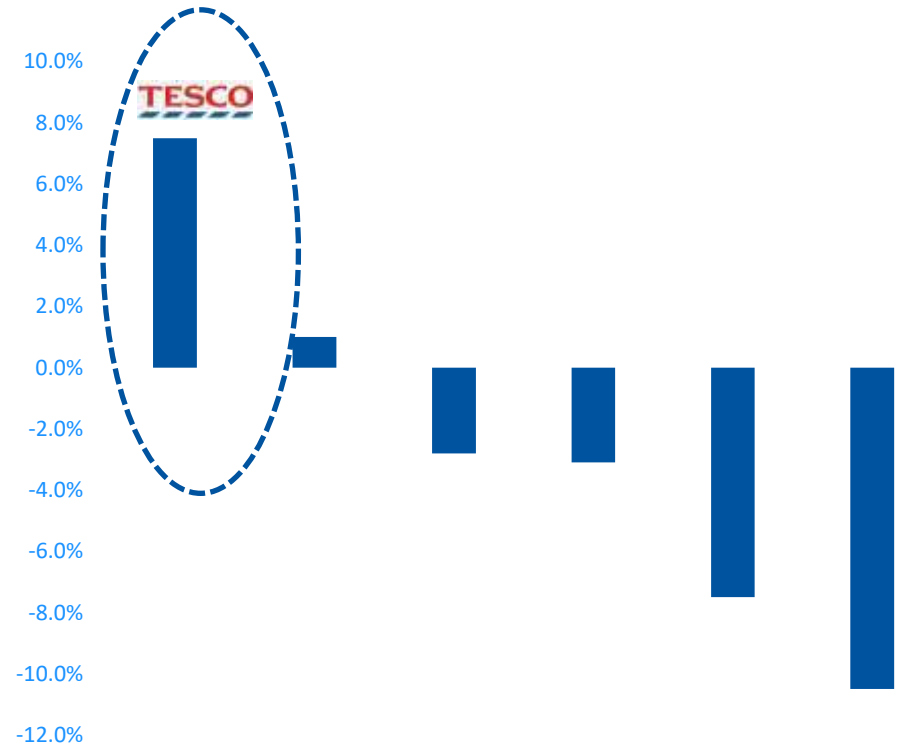
Kantar switching



Red Meat performance.

- Tesco have 24.2% share of the Red Meat market in the UK
- In Scotland, Tesco have 25.2% share of the Red Meat market
- In Scotland Tesco are growing faster than others at +7.5% vs last year
- Tesco are committed to sourcing Scotch Red Meat and have plans to further grow volumes

Red Meat Volume Growth in Scotland



The Red Meat category is evolving.

The narrative on Red meat is changing



Consumer diets are changing



Challenges remain in the sector



Importance of Scotch Beef to Scotland.

1



Economic importance

2



Customer importance

3



Higher quality

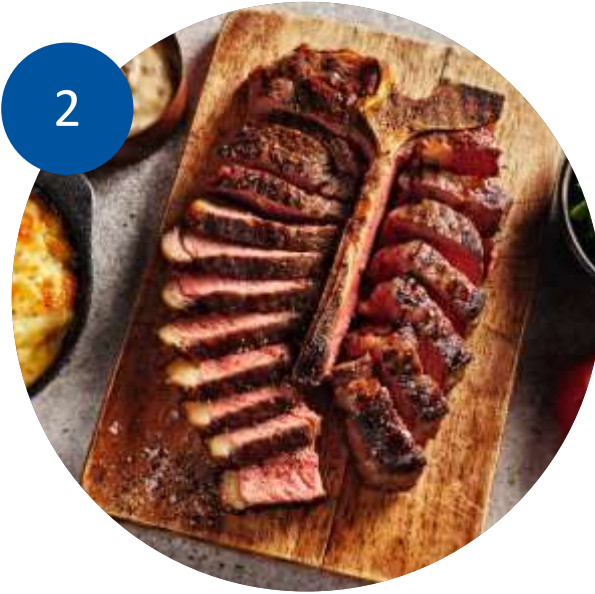
What are Tesco doing to support Scotland?

1



Scotland is important to Tesco

2



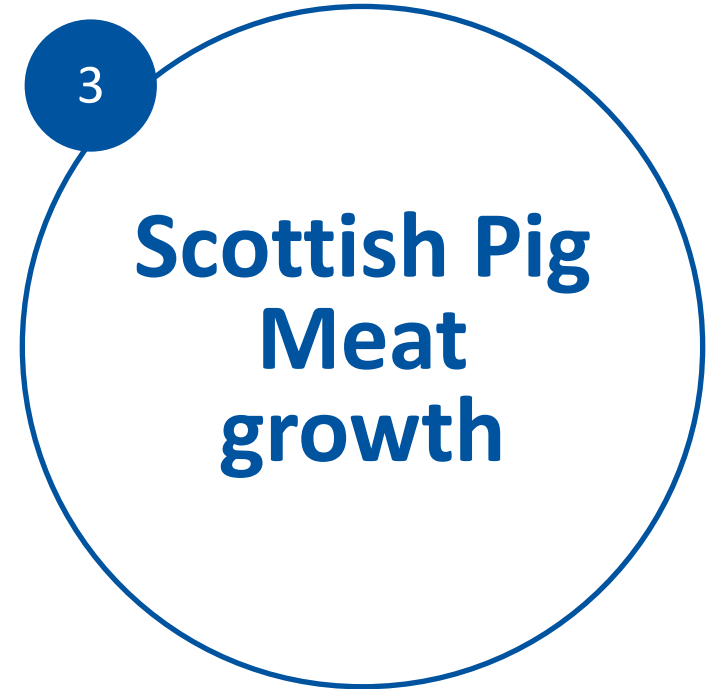
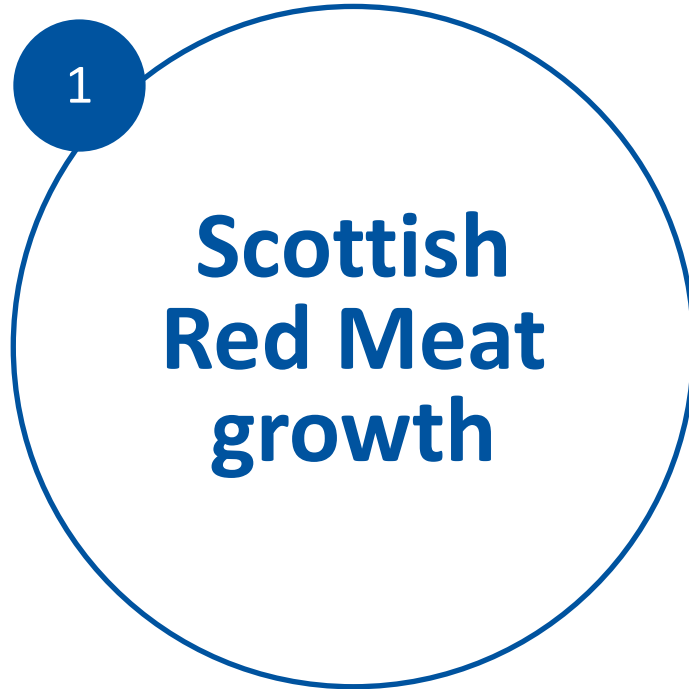
All Scotch beef will be processed and packed in Scotland

3



Tesco are committed to partnering with QMS

We have big plans to grow Scottish volumes.



Summary.

Challenges remain.

Opportunities also exist.

We have ambitious plans to grow.

We are committed to Scotland.

INTRODUCING
**DAVID
MILLAR**

Scottish Chef of the Year



WHAT SEPERATES GOOD FROM WORLD CLASS?



CARLOWRIE CASTLE

Specializing in creating bespoke experiences, with world class service and exquisite meals prepared by one of Scotland's most notable chefs.



MEET
CARLOWRIE
HIGHLAND COWS



**JOHN GILMOUR
BUTCHERS**











CARLOWRIE FRIENDLY HAIRY COO'S



THANK YOU FOR LISTENING

DAVID MILLAR



Scotch at Home and Abroad

Tom Gibson

Director of Business
Development

tgibson@gmscotland.co.uk

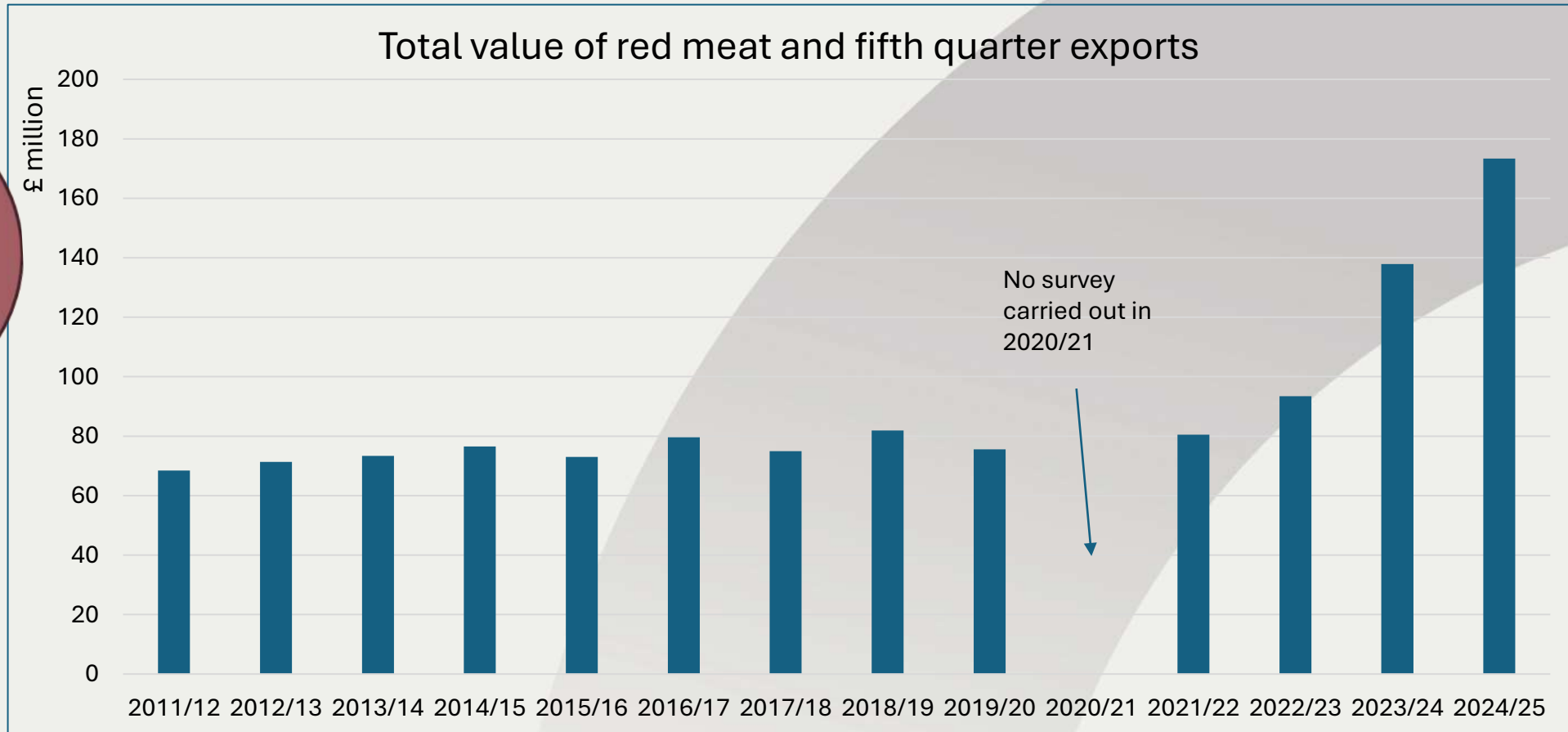
Scotch Beef & Scotch Lamb PGI

- EU PGI accredited 1996
- First red meats in Europe to gain PGI status
- Longest standing QA scheme in the world – 35 years
- Whole of life, whole of supply chain quality assurance
- Guaranteed authenticity & legally protected



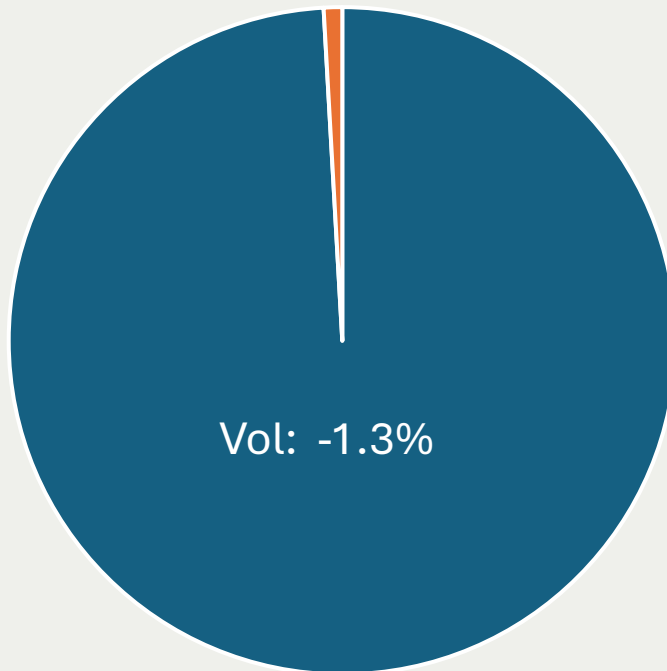
Exports – Scottish Beef & Lamb

Exports of Scottish beef, lamb and fifth-quarter products up 26% in value



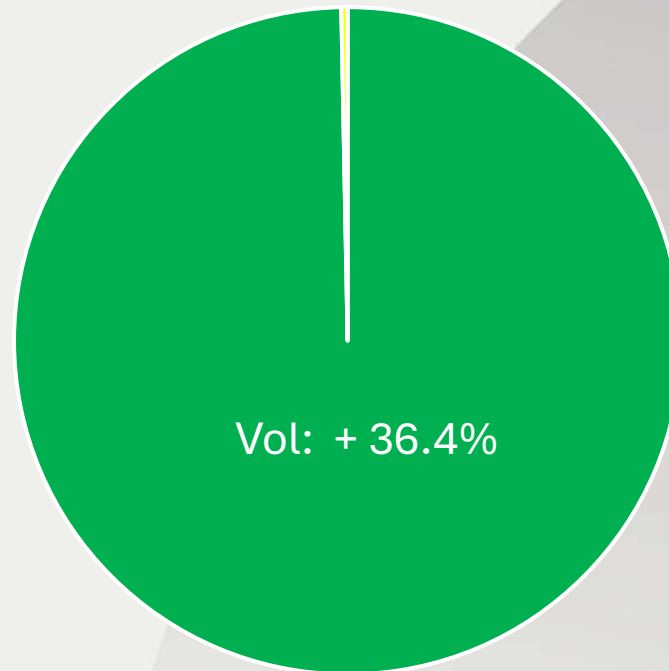
Exports – Scottish Beef & Lamb Volumes

Beef



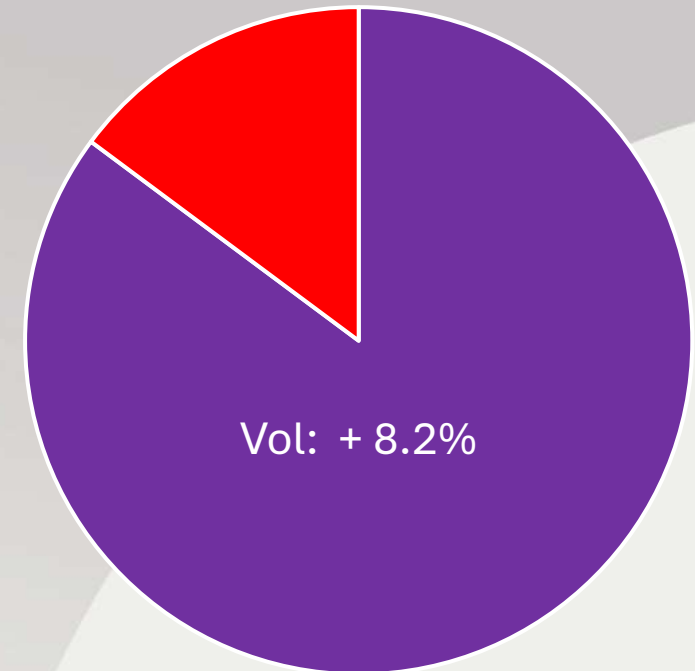
■ EU ■ Non-EU

Lamb



■ EU ■ Non-EU

Fifth quarter



■ EU ■ Non-EU

Exports – Key international markets

Beef

1. France
2. Netherlands
3. Italy
4. Irish Republic
5. Germany



Lamb

1. France
2. Germany
3. Belgium
4. Italy
5. Netherlands



Exports – Scottish Pig Meat

- Export volumes increased by 61%
- Key international markets:
 - China
 - Ivory Coast
 - Philippines
 - Caribbean



Export Challenges

- Post Brexit
 - EHC's & additional costs
 - Customs
 - Products restricted
 - Logistics - groupage
- Freight costs
- Shelf life
- Currency fluctuations
- World events (eg Gulf conflict)



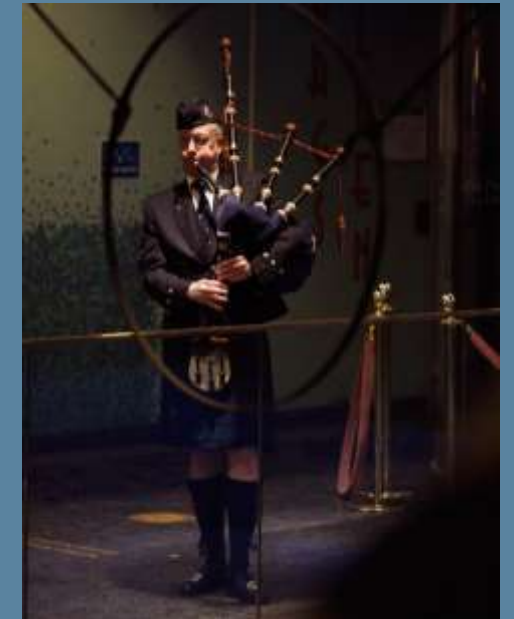
Export Opportunities

- Market access
 - New EU SPS agreement
 - Japan & Philippines - beef
 - Mexico - pork
- China pork brand development
- Cuts & carcass balance
- Price premium
- Demand



Scotch Beef Club

- Supporting premium foodservice globally to increase value
- Re-launched in March 2025
- Launch events in Milan, London, Amsterdam, Stockholm
- Over 75 members signed up
- Knowledge transfer events
- Scottish Young Chef of the Year
- Scottish Culinary team



Scotch Butchers Club

- Re-launched in 2020
- Over 250 members
- UK & international
- New marketing strategy launching 2026
- Skills development
- Butchers diploma sponsorship
- World Butchers Challenge sponsorship



Exports – Market Development

- Anuga / Sial
- Inward & outward missions
- Processor development fund
- Scottish Development International
- UKECP - EHC's, market access



Thank You

Tom Gibson

tgibson@qmScotland.co.uk

Future Opportunities

15:15

- Neil Wilson, Chair, Food and Agriculture Stakeholders Taskforce (FAST) and Executive Director, Institute of Auctioneers and Appraisers Scotland (IAAS)
 - Dr Carrie Ruxton, award-winning Dietitian and Board Member, Quality Meat Scotland
 - Holly McLennan, Communications and External Affairs Director, Quality Meat Scotland
 - Nicola Wordie AKA Livestock FarmHER
 - Anna Jones, Freelance Journalist and Broadcaster, and Founder, Just Farmers
 - Panel discussion
-

Future Opportunities

Neil Wilson

Chair, Food and Agriculture Stakeholders Taskforce (FAST)

Executive Director, Institute of Auctioneers and Appraisers Scotland (IAAS)

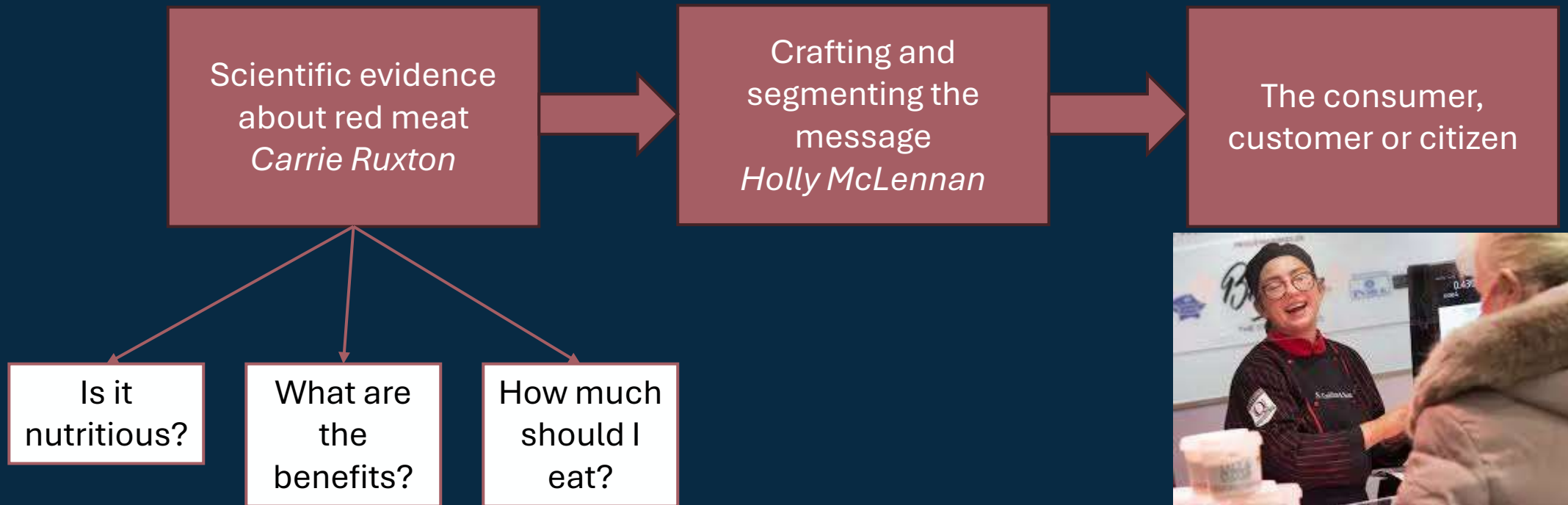


RED MEAT REPUTATION

Evidence to story

Carrie Ruxton & Holly McLennan

The communications journey



Is red meat nutritious?

	Source of ($\geq 15\%$ NRV)	Rich in ($\geq 30\%$ NRV)
Beef	Iron, potassium, phosphorus, riboflavin	Niacin, vitamins B6 & B12, zinc
Pork	Riboflavin, zinc, potassium, phosphorus, selenium, pantothenic acid	Thiamin, niacin, vitamin B6, vitamin B12
Lamb	Vitamin B6, potassium, phosphorus, pantothenic acid	Niacin, vitamin B12, zinc

Nutrient gaps in the UK

- 50% of teen girls and 30% of women lack iron
- 30% of adults lack potassium
- 20% of people are deficient in vitamin D
- 1/3 males and half of females lack selenium

More nutrition facts

- Source of high-quality **protein** containing all the essential amino acids
- The **iron** in meat is **3X** more bioavailable than the iron in plant foods
- Unprocessed red meat is naturally low in sodium



What are the benefits of red meat?

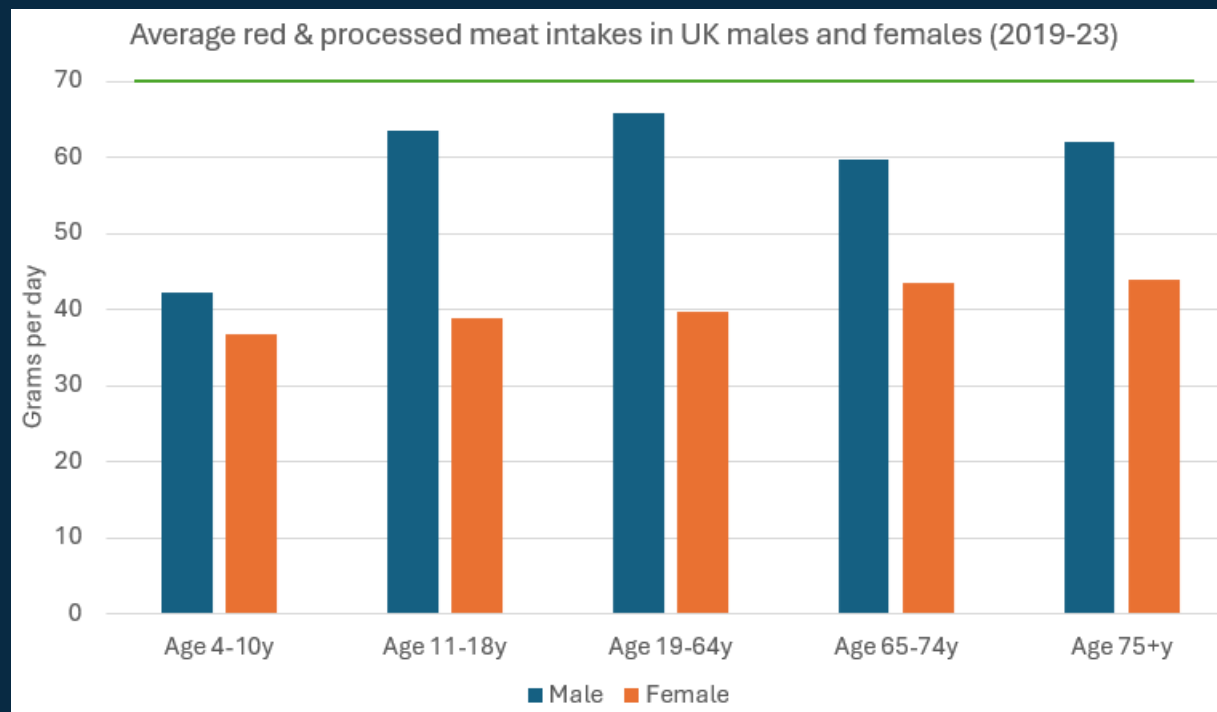
1. Normal heart health and blood pressure
2. Normal vision
3. Growth & maintenance of muscle
4. Mental function, anti-fatigue
5. Immune function
6. Normal bones and teeth
7. Normal skin, hair, nails



How much should I eat? Depends who you ask!

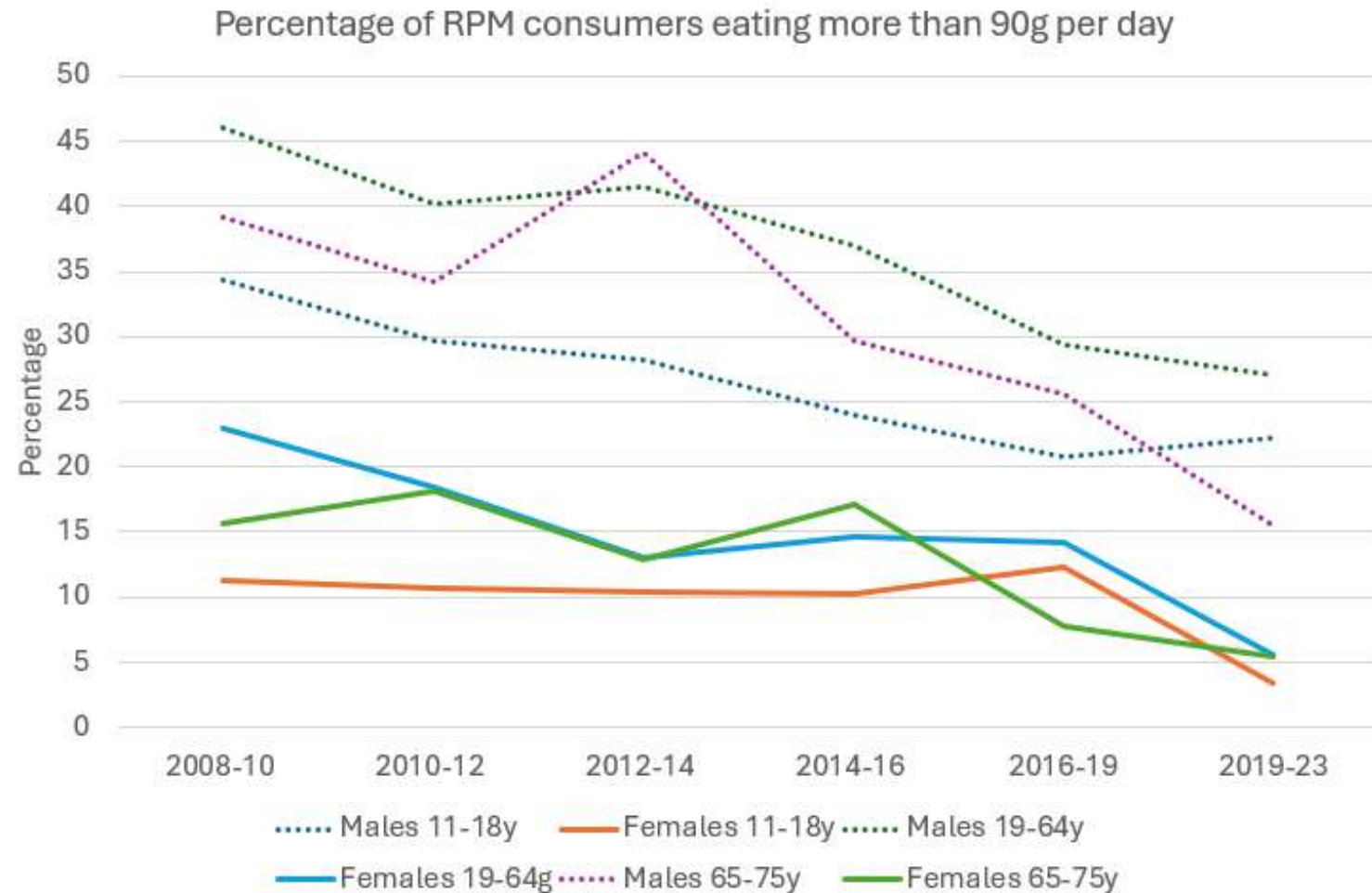


14 grams a day



<70 grams a day

The 'reduce red meat' message is no longer appropriate for females, 3-5% of whom are eating more than 90g per day – compared with 15-27% of males



What is the evidence for red meat?



Red meat is nutrient-dense and contains high quality protein. The iron and protein are easily digested by the body



The nutrients found in red meat support normal health. Significant groups of people lack these nutrients and could benefit from meat in the diet



Most people eat the right amount of red meat. The blanket 'eat less' message is no longer appropriate and could harm nutrient intakes



RED MEAT REPUTATION

Will cover:

1. What is reputation
2. Why is reputation important
3. Building and protecting reputation
4. Reputation at QMS

What is reputation?

“Reputation is what people say about you when you’re not in the room”

Character + perception = reputation gap

Overall goal of reputation:

Manage perception, build trust and opportunity

QMS reputational aim:

Tell the positive red meat story to policy makers, educators, influencers and citizens, encouraging advocacy



Why is reputation important?

Social capital

- Trust
- Loyalty
- Advocacy

Business multiplier

- Protects
- Enhances value
- Attracts partners and support
- Competitive advantage



Reputation takes
years to build and
moments to destroy

Building & Protecting
Reputation

A photograph of a herd of cows in a grassy field. The central focus is a light-colored cow with a yellow ear tag, looking directly at the camera. Other cows of various colors (brown, black) are visible in the background, some also with ear tags. The background is slightly blurred, showing a hazy sky and distant trees. The overall tone is natural and professional.

Storytelling – start with the evidence



Red meat is nutrient-dense and contains high quality protein. The iron and protein are easily digested by the body



The nutrients found in red meat support normal health. Significant groups of people lack these nutrients and could benefit from meat in the diet



Most people eat the right amount of red meat. The blanket 'eat less' message is no longer appropriate and could harm nutrient intakes

Stick to 3 key messages

Storytelling – be audience led

Knowing and understanding internal and external stakeholders is critical to successful communications and relations



Map your stakeholders

Different audiences need different messages



**Consumers - 'what does it mean
to me and my family'**



**Businesses – how does it
support our profitability /
sustainability?**



**Political – how important and
impactful is it to society and
economy?**

Storytelling – keep consistent and engaging



Create once, use many

Reputation at QMS

A photograph of a pig in a barn. The pig is the central focus, walking towards the camera. It has a light pinkish-white coat with some darker spots on its face. The barn floor is covered in straw. In the background, other pigs are visible, some standing and some lying down. The walls of the barn are made of corrugated metal. The lighting is natural, coming from the side, creating soft shadows.

Since our Strategy began:

20K

Total community reach

600

Schools used meat vouchers

>100

Community engagement events

40

Make it Scotch Ambassadors



“Scotch Beef is the best quality meat”



“Red meat is good for you and helps muscle growth”

“Scotch Beef is important for your wellbeing and fitness”

Upcoming plans

Reputation

- Red meat narrative
- Evidence to storytelling

Community engagement

- Make it Scotch Ambassador service
- Meat Voucher Scheme
- Training programme for educators



Expanding our reach to more schools, sports clubs and communities across Scotland

Summary



When building reputation remember:



Start with the evidence and
simplify

Reputation can
never
completely be
controlled

Know your audience

Reputation is a
long game

Consistency is key

TECHNOLOGY, SOCIAL MEDIA AND HOW I TELL OUR FARMING STORY



NICOLA WORDIE
@LIVESTOCK_FARMHER









INTRODUCTION

I'm 27 years old

My Dad, myself and 1 cattleman full time

Roughly 1400 acres

240 suckler cows

1000 ewes

30 acres of spring barley

10 acres of swedes















@LIVESTOCK_FARMHER

OVER 50,000 FOLLOWERS



Livestock
FARM

Good ^{AND} Bad, Day to Day





Thank you for listening
Tag along - @livestock_farmher



FOOD FOR THOUGHT



Anna Jones

JOURNALIST, AUTHOR, EDUCATOR, FOUNDER JUST FARMERS





Home



Work



Debate. Distrust. Division.

Don't Talk About Beef (it'll upset the tourists)

This is a story in the world of 2019 as it goes on in all eyes over the 2019 beef crisis



Can Starmer hold the line on hormone beef?

As the new Labour leader in Downing Street, Keir Starmer has a big job to do. He has to hold the line on hormone beef.



Flame grilled: Meat in the media

By Anna Jones
16th August 2019



Home > Now

Apocalypse Cow: The moment Monbiot went too far

By Anna Jones
26th January 2020



Is anyone else struggling to keep up with Channel 4's well-to-well meat coverage? I'm pretty sure it's not just me. It's going at it with both barrels.

But for many viewers these days I consume most TV on catch-up. I don't see the TV and I don't see the TV. I don't see the TV and I don't see the TV. I don't see the TV and I don't see the TV.

My take on it

Author Platform

Related Articles

Leicestershire Grows Olive Oil: A British First

The Earliest Harvest on Record: What It Means for UK Farming

Food Security at Risk? The Growing Crisis in UK Farming

The Future of Family Farms: Budget Changes Explained

Cheers to celebrating English Wine Week!

Share Article



Home > Now

Meat on the BBC: The good, the bad and the ugly

By Anna Jones
27th November 2019



Has a BBC documentary ever been so eagerly and angrily anticipated by British farmers? At 3pm on Monday night I switched over to catch the BBC One ident and the announcer warning of scenes that some viewers may find disturbing.

Author Platform

Related Articles

Leicestershire Grows Olive Oil: A British First

The Earliest Harvest on Record: What It Means for UK Farming

Food Security at Risk? The Growing Crisis in UK Farming

The Future of Family Farms: Budget Changes Explained

Cheers to celebrating English Wine Week!

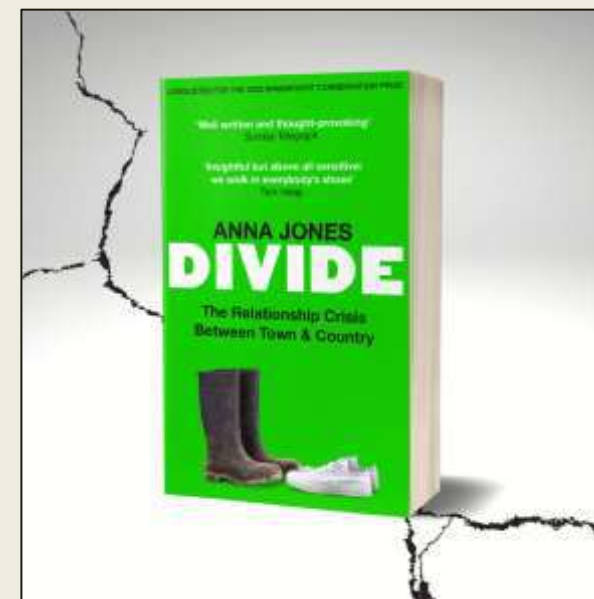
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**Bridging
division.**



**Building
community.**





Don't Talk About Beef (it'll upset the tourists)

Subscribers · - 22 Feb 2026

Pride in farming is only possible if farmers are proud enough to tell their story. Here's how a cowboy experience on a ranch in Costa Rica reminded me of that.

 Listen to this article
Read by Anna



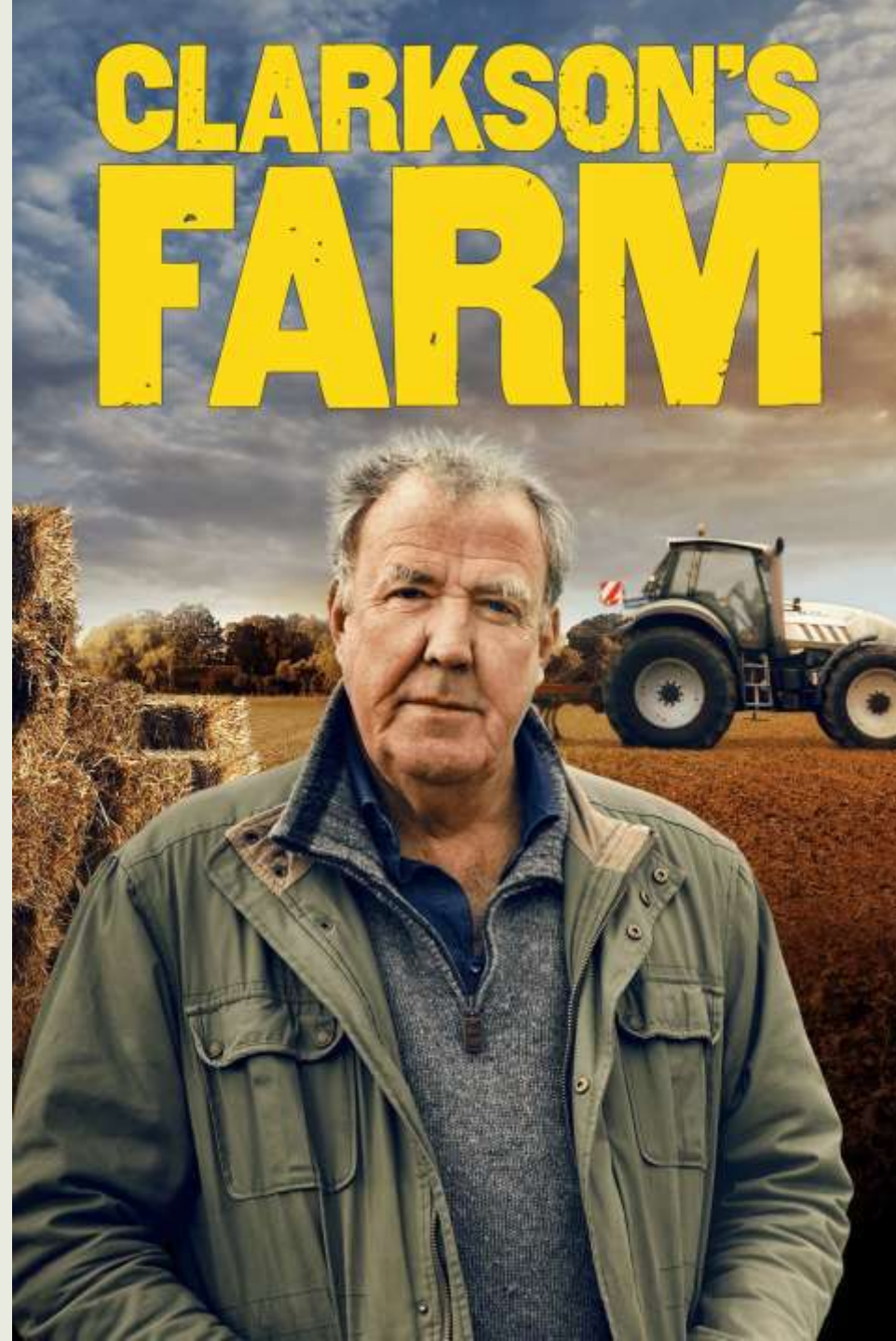
Share:





We ALL have a story

**How can YOU
do what he
does?**



JUST FARMERS
is coming to
YORKSHIRE!



12TH & 13TH MAY 2026

GREAT YORKSHIRE SHOWGROUND, HARROGATE, HG2 8NZ

Places are free, but strictly limited.

**FULLY FUNDED MEDIA EDUCATION
FOR FARMERS & GROWERS**



Join us!

Interested? APPLY NOW!



@JustFarmers



@JustFarmersUK

Closing remarks

16:55

Kate Rowell

Chair, Quality Meat Scotland



IAAAS

SCOTLAND
FOOD & DRINK

MONEY



KEPAK

Mc Intosh
Donald



Gold Sponsor



Future Thinking on Red Meat conference

Murrayfield Stadium, Edinburgh
Tuesday 10 March

SCOTLAND
FOOD & DRINK

MONEY



KEPAK
McIntosh
Donald