



Quality Meat Scotland

# Annual Review 2023-24







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# Chair's Address / Kate Rowell

## Making Scotland the choice for premium red meat

Since announcing our new five-year strategy at last year's Royal Highland Show, we have made significant progress in strengthening our proposition for making Scotland the choice for premium red meat. I've enjoyed discussing our strategy – our key pillars of Provenance; Productivity and Profitability; and Planet and Place – and our vision and plans with our stakeholders at the many workshops we've held throughout the country since the launch, and I've been encouraged by the positive feedback we've had. It has given me the opportunity to explain about our first levy increase in more than a decade.

We have set our mission to drive demand from consumers who will recognise our QMS brands as a mark of integrity. To achieve this, we will focus on three game-changing projects: developing a world-leading system for verifying the eating quality of Scottish red meat; building a genomic database to help drive productivity and profitability; and, through marketing and communications, promote the integrity provenance and sustainability of our brands.

That's why I was excited by our recent promotional activity, including our first ever Christmas TV advertising campaign, which targeted almost 90% of the adult population here in Scotland. This was followed by a new TV and social media advertising campaign in January, which had an overwhelmingly positive response. This focused on communicating the *inCREDible* credentials of the Scotch and Specially Selected brands to Scottish consumers in a positive way – focusing on health, diet, quality assurance, locally sourced and a product that is farmed with care – and was supported by a free comprehensive information pack, *Celebrating the positives of red meat*. This was followed by our *Meat & 2.0* initiative this spring.

For our farmer members, our strategic focus on Productivity and Profitability has been evident in our management of the successful Monitor Farm Scotland programme, with support from AHDB and funded by the Scottish Government, and the launch of the *Building Better Beef* report, designed to unlock greater productivity, profitability and sustainability in the suckler beef sector.

In export markets, we relaunched the Scotch Beef Club in Italy, and our attendance at Germany's Anuga trade show resulted in a record £22.9 million of new export business. Further afield, Scotch Lamb featured in a special COP 28 dinner organised by Scottish Development International in Dubai and the supplier, Woodhead Brothers in Aberdeenshire, became the first processor in Scotland to receive accreditation to supply lamb in the Middle East – a region that imports on average of £571m worth of sheep meat each year.

With the clock ticking on new and emerging global trade deals – which could open the floodgates to agricultural goods produced to lower standards than our own – there has never been a more important time to showcase to the public the very best of Scottish farming and the high standards to which we operate and set ourselves rightfully apart from others on the global stage. That is why QMS Quality Assurance is vital to our members and it is gratifying that 90% of Scotland's breeding cattle population, more than 80% of the breeding sheep flock and almost 100% of significant pig farming businesses are covered by this charter.

We have also been busy promoting the QMS brand to butchers. With 270 members in our Scotch Butchers Club and we ran a butchery careers campaign across social media in early 2024 to showcase what a rewarding career choice it can be for new entrants.

Our Health and Education Team is also building on the work of QMS to strengthen trust and connection to the red meat sector in schools and communities. This year, we had a range of initiatives including QMS School Meat Vouchers and encouraging schools to get involved in QMS school dinner challenges as well as promoting the Skills for Farming Group, which strives to work collaboratively to promote skills development within the farming industry.

And, of course, our Market Intelligence and Public Affairs teams are taking every opportunity to inform and guide policy makers and parliamentarians to help support QMS's aims and Scottish agri-food sector.

As you can read, we have an exciting, ambitious strategy, a brand story which is being strongly told and new opportunities are already emerging in our drive to make Scotland the choice for premium red meat. Bring on 2024! @

“

**We have set our mission to drive demand from consumers who will recognise our QMS brands as a mark of integrity.**

**Kate Rowell  
Chair of Quality  
Meat Scotland**





# CEO's Address / Sarah Millar

## We are focused on championing Scotland's red meat industry

Scotland's red meat is at the heart of our world-renowned food and drink sector and intertwined with our rural communities. Red meat is fundamental to Scotland's agri-food sector, with an annual economic estimated output of £2.8 billion, up more than 16 per cent from £2.4bn in 2016, as featured in the [QMS Scottish Red Meat Sector Economic Impact Report 2023](#).

This vital economic contribution supports the wider supply chain, generating revenue worth £885 million from meat processing, £361m from core supply trading – veterinary, machinery, fertiliser, feed and repairs/buildings – a further £225m in output from other farm supplies as well as sustaining more than 39,000 jobs.

Over the course of 2023-24, the team at QMS has been working tirelessly to champion Scotland's exceptional red meat products, promoting our brands as a mark of integrity and emphasising quality, provenance, sustainability and animal welfare. And we have made significant progress.

We launched our ambitious five-year strategy *Scotland: The Choice for Premium Red Meat* at the 2023 Royal Highland Show and outlined our key pillars of Provenance, Productivity and Profitability, and Planet and Place.

This was followed by in-person and online stakeholder engagement, with 13 workshops across Scotland allowing all members to fully understand the new strategy.

The meetings also provided an opportunity to discuss the first levy increase in more than a decade. With costs increasing, a protected budget is needed to realise the ambitions set out in our strategy.

High levels of industry support for the increase and its approval by the Scottish Government mean we can now fully embrace our approach, and we have already undertaken a significant staff restructure to ensure we deliver maximum impact.

We are progressing our ambition to make Scotland the choice for premium red meat, with a comprehensive marketing plan which has helped drive sales. This includes our first ever Christmas TV

advertising campaign, followed by our *Meat & 2.0* initiative this spring. We also exhibited at international trade shows, as Chair Kate Rowell highlights in her address.

We are continuing to inspire the next generation through initiatives, such as our Meat Voucher Scheme, Tasty Little Weeks and The Better Burger Challenge, with our Health and Education Team deeply involved in education at all levels.

Our aim is to make Scotland the choice for premium red meat, but we must be unwavering and commercial in our focus to achieve this. We know what success looks like. It will be an industry with greater confidence, with sustainable profitability and productivity at its heart, delivering a product high in demand, viewed by our customers – here and overseas – as their premium red meat choice.

Whatever the challenge, the QMS team and Board always raises their game to promote and protect our red meat industry. In 2024 and beyond, we will continue to promote and market Scotch Specially Selected products.

Our mission is clear and we look forward to making strong progress on ensuring Scotland is the choice for premium red meat. @

**Sarah Millar**  
CEO

“ Our aim is to make Scotland the choice for premium red meat, but we must be unwavering and commercial in our focus to achieve this.



# Strategy and Levy Income

## QMS Strategy

QMS's overall strategy for 2018 to 2023 was to support the development of a sustainable, professional, resilient and profitable Scottish red meat industry, which makes an important contribution to Scotland Food and Drink's ambition to double the value of the industry to £30bn by 2030.

We focused on the following four strategic objectives:

- Building the Scotch Beef UK GI, Scotch Lamb UK GI and Specially Selected Pork brands through quality assurance and effective marketing and communications with consumers. More than 70% of QMS's external levy spend was on consumer-facing activity.
- Supporting the sustainable growth of the industry through strategic engagement with key stakeholders, supply chain collaboration and a cascade of key market information.
- Developing capability and capacity in the Scottish red meat industry through training and education initiatives to attract, motivate and develop the workforce.
- Delivering professional services which support the continued growth of a resilient, professional Scottish red meat industry able to grasp opportunities and meet challenges.

In June 2023, QMS launched its new five-year strategy *Scotland: The Choice For Premium Red Meat 2024-2028*. The strategy was announced at QMS's annual industry breakfast briefing at the Royal Highland Show.

The report is built around three strategic pillars:

1. Provenance
2. Productivity and Profitability
3. Planet and Place.

The newly launched strategy reaffirms QMS's commitment to its members and people right across the supply chain, deepening its core activity to nurture and utilise the best of talent across the sector that will support the delivery of the strategy. Read the [five-year strategy document](#).

## Levy Income

There were no changes to the rates of Statutory Red Meat Levy collected in Scotland during the financial year 2023-2024. Following extensive consultation with industry stakeholders and dialogue with QMS levy payers at a series of winter workshops, Scottish Ministers approved an increase in QMS levy rates to come into effect from 1 April 2024.

The Scottish red meat sector faces growing global competition, with many countries targeting the high-value UK market as well as our export markets. QMS has not requested a levy increase since 2010 and we wanted to ensure we remain fit for the future of Scotland's iconic Scotch and Specially Selected brands, to enable us to continue the important work to drive productivity and profitability.

Read more about our [QMS Levy Review](#).





# Market Intelligence and External Affairs

## Providing Robust, High Quality Insights and Evidence for a Wide Variety of Groups

Market Intelligence is a fundamental service offered by QMS, providing regular and bespoke economic insight and commentary on the structure and market movements within the Scottish red meat industry.

Regular outputs include market price updates for the Scottish press, a wide-ranging weekly dashboard of market indicators in the QMS newsletter, a monthly market update covering the industry and economic factors driving market movements, and monthly commentary on a specific topic of interest in the sector. Each year, the team publishes the [Scottish Red Meat Industry Profile](#), which aims to highlight the importance of the red meat sector to Scotland's rural economy and provide a range of key statistics for use by industry stakeholders.

Bespoke outputs are also undertaken on a pre-competitive basis for members of the Scottish red meat supply chain, and typically feature topics such as potential trade deal impacts, structural changes within supply chains and analysis of new market opportunities.

The Market Intelligence team also actively contributes to a range of industry discussion and information forums, ensuring that industry can amplify the work and data that QMS holds.

These outputs are possible only through the regular update and maintenance of key datasets by our Market Intelligence specialists. The team's analysis and interpretation of the data, along with monitoring of national and global topics crucial to the sustainable development of the red meat industry, is a vital resource for other teams within QMS.

Curating the evidence base that underpins strategic decision-making, the work is used, for example, for framing strategy, levy forecasting, risk management and planning future activities and opportunities.

## Stakeholder Engagement

Collaborating and engaging with members of the Scottish red meat industry at all stages of the supply chain is critical to QMS. This year has seen us out and about, maximising opportunities to engage face-to-face.

The key vehicle for stakeholder engagement and collaborative working is the Scottish Red Meat Resilience group, which has seen the addition of new member organisations this year and now includes: NFU Scotland, the National Sheep Association, the Scottish Beef Association, Scottish Craft Butchers, the Scottish Association of Young Farmers Clubs (SAYFC), the Pig Industry Leadership Group, the Scottish Association of Meat Wholesalers, the Institute of Auctioneers and Appraisers in Scotland (IAAS), Agriculture Industries Confederation (AIC) Scotland and the Scottish Crofting Federation.

The group has established a policy working function to deliver on key collaborative consultation responses and, so far, has produced responses to the Scottish Government's draft Biodiversity Strategy and the Agriculture and Rural Communities (Scotland) Bill proposals. The group has also carried collaborative industry representations to elected officials on key issues, such as Edinburgh City Council's endorsement of the Plant Based Treaty and the proposals of colleges to reduce their land-based courses.

A comprehensive programme of work is planned for 2024 to spearhead collaborative industry action on identified themes that could impact the supply chain.

# Health, Education and

## Engaging

The Health and Education team continues to build on the work of QMS to strengthen trust and connection to the red meat sector in schools and communities.

The team continued to highlight how red meat producers are engaging in sustainable farming practices, which deliver on a range of environmental, economic and social outcomes. They also focused on the health benefits of eating red meat as part of a healthy and balanced diet.

Contact the team at [education@qmscotland.co.uk](mailto:education@qmscotland.co.uk) and access our Farming Foodsteps teaching resources at [Farming Foodsteps](#)

You can also keep up to date on X (formerly known as Twitter) at [@MakeltScotchSc](#)



## Tasty Little Weeks

This year's focus was to increase the redemption rate of the QMS School Meat Vouchers and to encourage teachers to try something different with their meat vouchers.

Tasty Little Weeks was created to have three weeks peppered throughout the academic year, with each week focused on a different protein and teachers sent recipes and resources to deliver engaging lessons.

Teachers received step-by-step Gousto-style recipe cards for practical cookery lessons as well as worksheets

and lesson plans for an accompanying theory lesson. There was also social content created to promote the week and encourage engagement.

**Tasty Little Pork Week** kicked off the programme in late September, focusing on animal welfare and the health benefits of Specially Selected Pork, particularly in comparison to chicken. The two bespoke recipes were sweet ginger Specially Selected Pork chow mein with plum sauce and Specially Selected Pork curry in a hurry.

Next was **Tasty Little Lamb Week**, which coincided with Lamb for St Andrew's Day to create a real buzz, particularly across

our social channels. The Scotch Lamb dhansak in a dash was well received, as was the return of the popular Scotch Lamb naan pizza. The theory lesson focused on sustainability and explored Scotch Lamb's locality, seasonality and versatility.

QMS also worked closely with the Institute of Auctioneers and Appraisers in Scotland (IAAS) to support them with the Lamb for St Andrew's Day project.

**Tasty Little Beef Week** in February was the final push for teachers to use their meat vouchers. The featured recipes were Scotch Beef margarita meatball orzo pasta and Scotch Beef tortilla turnover.



# Skills



The theory lesson consolidated learning on ethical and environmental factors that can affect consumer food choices and the health benefits of Scotch Beef as part of a balanced diet. This looked at dispelling the myths around Scottish beef production and factors which impact consumer food choices.



## Cookery Demonstrations

The team has built up a network of freelance cookery demonstrators who have a wealth of knowledge and experience in the food industry. One of our demonstrators is an experienced additional support educator, which means we can provide education to even more pupils.

## Be a Farmer Day

The National Skills for Farming Group, which includes stakeholders from across the agricultural industry, held its inaugural Be a Farmer Day at SRUC Barony in June. One of the project's key priorities is improving industry attractiveness and young people's perceptions of the industry as well as showcasing the range of careers available.

QMS collaborated with the IAAS to deliver a Be An Auctioneer session. Murray Steel, from United Auctions Stirling, spoke to pupils about the skills required to be an auctioneer and about his career pathway. Murray highlighted the variety within the job and the chance to travel across Scotland and meet new people.

Our team was out and spoke to pupils about the journey red meat makes, from farm to fork, and the wide range of careers available throughout the journey.

The highlight of the session was the auction, which saw imaginary sheep being sold for more than £1 million!

Pupils also learned about sheep shearing, technology in agriculture, tractors, dairy farming, animal husbandry, research, engineering and countryside management. Perception analysis was also being carried out prior, during and after the event to find out how young people

perceive the industry and how the Be a Farmer Day influenced this perception.

## Better Burger Challenge

The Better Burger Challenge, which uses the resources within Make it With Meat, is a project created to engage and encourage schools to explore reformulation and create healthier versions of the popular classic burger. 2023 was the first year of the competition and there was a lot of interest from teachers. The many entries from across Scotland were narrowed down to four finalists, with Aiden and Aiden from Kirkintilloch High School, East Dunbartonshire, crowned the winners with their creation the *Big Drooling Dreamer*.

The winning team impressed the judges with their flavour combinations and consideration of the Scottish dietary goals. Their prize was a class trip to the Royal Highland Show, where the winning team was presented with certificates and a prize in front of their classmates.





The Better Burger Challenge, developed in partnership with Food and Drink Federation (FDF) Scotland and QMS, has encouraged teachers to use the online Make it With Meat resource. Make it With Meat is a complete project with lesson plans, worksheets and more. It helps pupils learn about the burger making process from farm to fork, and includes lessons on farming, nutrition, reformulation, product development, costing, labelling and careers.

Find out more by visiting the website  
➔ [Farming Foodsteps](#)

## Farming Foodsteps

To better meet the needs of teachers and pupils, Farming Foodsteps has been developed with increased functionality. The new-look Farming Foodsteps increases the accessibility of the resources and has improved the user experience. New resources are continually being added to meet the needs of Scottish educators.

Find out more by visiting the website  
➔ [Farming Foodsteps](#)



## Make it Scotch Education

In a subtle shift in name, the Health and Education team is ensuring its educational messages aren't limited to school pupils but available to a wider consumer audience.

The new Make it Scotch website  
➔ [www.makeitscotch.com](http://www.makeitscotch.com) has educational content integrated throughout and a page dedicated to consumer education, which links to the Farming Foodsteps site.

Content has also been created for the Make it Scotch Education social media channels. Find out more on X  
➔ [@MakItScotchSc](https://twitter.com/MakItScotchSc)

## College Visits

QMS staff have been working with students in some of Scotland's colleges to develop their skills and knowledge of aspects of the red meat industry.

Education sessions covered butchery demonstrations, assurance scheme information sessions, sustainability talks and hospitality education sessions.

## Skills for Farming

QMS is part of the Skills for Farming Group, which strives to work collaboratively to promote skills development within the farming industry.

In addition, the group is working to raise awareness of what the industry can offer future employees as well as ensuring that the education and skills currently delivered match the requirements of the industry.

## The New Health and Education Co-ordinator

Tracy Martin joined QMS as Health and Education Co-ordinator in December 2023. Tracy lives in Castle Douglas, is a primary school teacher and for the past two years worked at the Royal Highland Education Trust (RHET) as Project Coordinator.







“

QMS is part of the Skills for Farming Group, which strives to work collaboratively to promote skills within the farming industry.



# Marketing

## A New Team

In the last 12 months, the QMS Marketing team has been restructured to encompass the Brand team – responsible for developing, implementing and evaluating all of the consumer-facing activation for Scotch Beef, Scotch Lamb and Specially Selected Pork – and the Brands Integrity team – who oversee and manage all elements of Quality Assurance, owning the standards and managing the relationship with the Certification Body.

The logic behind the change is to ensure marketing activity is underpinned by independently verified credentials. We also integrated the Category Insight function into the Marketing team to ensure consumer research and retailer/shopper analysis are all closely linked to the Brand team.

We also welcomed Emma Heath (pictured below) as our new Marketing Director. Emma joined us in October and has 30 years' experience of building food and drink brands in Scotland.



## Highland Show Highlights

The QMS team had a fantastic four days at the 2023 Royal Highland Show.

The event offered the unrivalled opportunity to demonstrate the work, skills and dedication which go into the production of Scotch Beef UK GI, Scotch Lamb UK GI and Specially Selected Pork.

Through immersive cookery demonstrations on the Lidl stand, interactive butchery demos at the Food for Thought Tent, sampling at Aldi and our summer TV advert playing on the main ring screens, those who came to the show got a real taste of what the red meat industry and its brands mean to Scotland's economy, environment, people and communities.

Perhaps the most notable highlight of the show was the launch of QMS's new five-year strategy at Friday's industry breakfast briefing.

Our CEO Sarah Millar said: "The Royal Highland Show was a real success for QMS – with a jam-packed calendar of activity... it was a fantastic opportunity for us all to come together and celebrate the sector as a whole."



"Our new vision is to make Scotland the premium choice for red meat across the globe. It's ambitious and bold, but the initial appetite we've seen from the industry throughout the Royal Highland Show reinforces that we're on the right track."

More information on the five-year strategy is featured on [page 18](#) and on the [QMS website](#)







Visit our website  
[makeitscotch.com](https://www.makeitscotch.com)  
and follow our social  
channels @makeitscotch  
for recipe inspiration  
and more.





# Marketing

## Summer Campaign

Our summer 2023 campaign focused on the BBQ season, with some fun and engaging content from our very own super butchers! The campaign ran across radio adverts (Hits Radio Scotland). There was also plenty of social media content across a range of digital mediums, including YouTube, Facebook and Instagram channels.



## Autumn Campaign

We ran a number of different mini-campaigns across August to November. Website takeovers and digital banner adverts circulated across relevant sites to promote Scotch Beef, Scotch Lamb and Specially Selected Pork, and we created new recipes to promote to our target audience. As in previous years, we ran activity around Love Lamb Week – first week of September – a Porktober campaign and Scotch Lamb for St Andrew's Day. This activity was predominantly digital and on social media, with additional materials to support our Scotch Butchers Club.



# BEEF IS BACK WITH A BANG

## Boost your B vitamins





## Christmas Campaign

We took our brands on TV for the first time at Christmas, reaching around 90% of Scottish adults. Our *Make it InCREDible* Christmas campaign launched on 20 November and ran until Hogmanay. It included:

- TV advert – Super-powered cooks on STV, Border and STV Player including some key high rating spots. Watch our first TV advert on the [QMS website](#)
- YouTube advertising
- My *InCREDible* Christmas recipe videos
- Social media advertising across Facebook and Instagram
- Seasoning's greetings 'How to' content videos
- Public relations (PR)
- New recipes.



## Positive Conversations Around Red Meat

In the first quarter of 2024, we reached up to 90% of Scottish adults with our advertising campaign focused on starting conversations about our brand credentials and recipe inspiration. We used a mix of TV (STV), advertising on YouTube, Facebook and Instagram, and a six-week radio partnership with key commercial stations across the whole of Scotland, which were very well received. We also ran a secondary social media-led plan, *Challenge Accepted*, focused on the health and versatility of red meat, budget-friendly recipes for everyone to enjoy and Valentine's Day activation. Download our toolkit [Having Positive Conversations Around COP26](#)

## Spring Campaign

Our spring campaign provided an impactful fresh take on meat and two veg. Research pointed to a key group of 45–65-year-old consumers in Scotland, who historically enjoyed red meat, but have started cutting back on consumption. We highlighted simple, new and exciting ways to cook with 'meat and two' and reached

almost 70% of Scottish adults using:

- Billboards
- Press advertising
- Supplement wrap with *The Times Scotland*
- Digital advertising
- Social media coverage
- Social media advertising across Facebook and Instagram.
- YouTube advertising



# Quality Assurance

## Leading the World with Whole Chain Assurance

With a rise in socially conscious consumers, our whole of supply chain assurance provides reassurance of provenance, highest standards of production, animal welfare and wellbeing.

The QMS Whole Chain Assurance scheme means only animals born and reared in Scotland that meet our stringent assurance standards are eligible to be classed as Scotch Beef, Scotch Lamb and Specially Selected Pork.

Maintaining and improving these standards is an opportunity to make our businesses more resilient and to connect with consumers who are increasingly showing an interest in the way we run our farms and tend to our livestock.

We continue to actively engage with industry to support changes which align with expanding consumer interest. This expectation from consumers is a great opportunity to build upon our relationship with customers and renew the farm to fork link.

## The Highest Standards

Independent market research and commentators continue to highlight how important Quality Assurance is to give reassurance and trust to consumers and retailers.

There are six Quality Assurance Schemes, which includes Cattle and Sheep, Pigs, Feeds, Haulage, Auction Market and Collection Centre, and Processor.

All schemes remain voluntary but to carry the Scottish red meat industry's three premium brands – Scotch Beef

UK GI, Scotch Lamb UK GI and Specially Selected Pork – livestock must have spent their entire life on QMS-assured holdings.

Each assurance scheme has its own standards, set by industry-leading experts who serve on standards-setting committees. These individuals have extensive knowledge of local and national policies and ensure all stakeholders are considered.

An independent certification body (CB) provides assessment and certification services to the QMS Whole Chain Assurance. Food Integrity Assurance (FIA) is accredited by the United Kingdom Accreditation Service (UKAS) to ISO/IEC 17065, the international standard for product conformity certification, and is regularly (at least once each year) audited by UKAS.

QMS has worked with members of the farming community and wider supply chain to look at how we can uphold the highest standards of integrity within the schemes, alongside giving transparency around, and confidence in, the decision-making processes that surround appeals and assessment of incidents involving the reputation of the Scotch Beef, Scotch Lamb and Specially Selected Pork brands.

As the culmination of this work, in July 2023 we introduced QMS membership rules and supporting documents which we refreshed to better explain how the schemes work.



More than  
**90%**  
of Scotland's  
breeding cattle  
population,





Taken together, these set out the terms and conditions of membership of the QMS Assurance Schemes and form part of the contract between your business and QMS in relation to participation in the schemes.

The majority of these rules cover basic items, such as how to apply to the schemes, however one of the key objectives is to give more transparency over the appeals process, particularly in the areas of 'Compliance with the law and scheme reputation'. Previously these were managed within the standards and via the certification process. Following significant discussions and feedback, we removed this as a standard and now manage this through membership rules, where a greater degree of subjectivity can be applied.

During 2024-25, we will renew the standards with our independent standards-setting committees to ensure they continue to evolve and remain fit for purpose, while trying to reduce the audit burden on levy payers.



**LEFT:** The six Quality Assurance Schemes include Feeds, Haulage, Auction Market and Collection Centre, Processor, Pigs, and Cattle and Sheep.

**BELOW:** Whole Chain Assurance ensures animals have the best possible quality of life on-farm and throughout the supply chain, resulting in the highest quality product reaching consumers.

## Engagement is Key

The Quality Assurance team has also produced a series of videos to highlight the process of quality assurance.

The assessment video provides a detailed look at what's expected during a Quality Assurance inspection. Animated graphics provide a clear demonstration of the four-step assessment process. Watch now on our [YouTube channel](#).

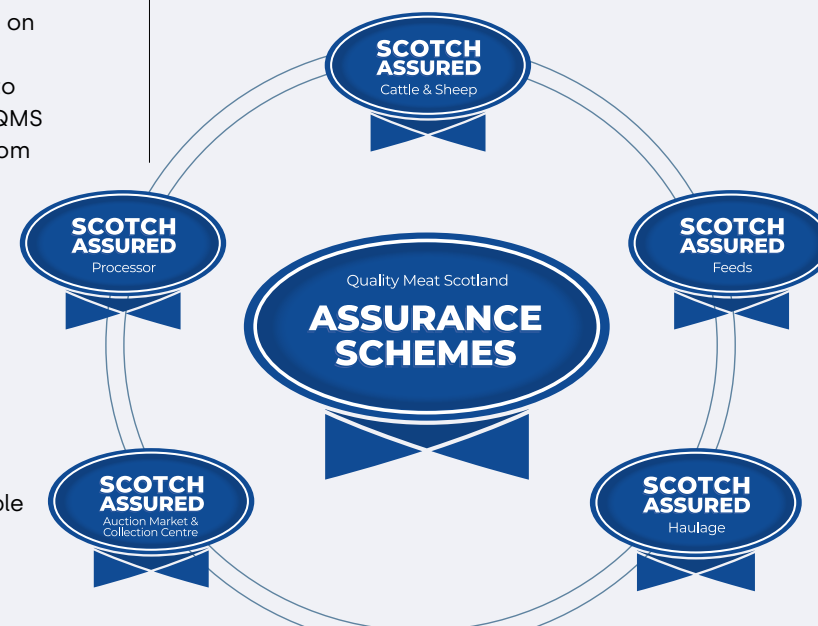
A short two-minute video was also created to explain Whole Chain Assurance. Find out how QMS assures quality throughout the whole chain, from farm to processing, ensuring animals are raised to the highest of standards and only the best Scotch red meat is sold. Watch now on our [Facebook channel](#).

If a farm doesn't quite meet QMS standards, what does this mean and how can it be rectified? The video *What's meant by a 'non-compliance'* sets out the guidelines and how QMS can help. Watch this on our [Facebook channel](#).

All Quality Assurance videos are also available on our [website](#).

Our Brands Integrity team works tirelessly to maintain and improve our schemes to ensure that from field to plate animals are produced to the highest of standards. We are also looking at how we can better drive the sustainability agenda in a way that is motivating and relevant to consumers.

More than **80%** of the breeding sheep flock, and almost **100%** of significant pig farming businesses are covered by QMS Quality Assurance.



# Industry Development

With our new five-year [QMS Strategy](#), we have seized the opportunity for the Industry Development team to recalibrate and put our resources behind some of the key projects that QMS is delivering.

One of this year's key changes has been building our work around how the red meat sector can help support our national greenhouse gas (GHG) emissions reduction targets. Building on research carried out for us by SAC Consulting, we are looking to develop a suite of resources and engagement events that will help producers and the wider supply chain understand how important their role is in helping achieve net zero as an industry.



## Building Better Beef

With one in five of Scotland's farming's workforce directly employed by the suckler beef sector, QMS released the [Building Better Beef](#) publication which provides an accessible yet detailed understanding of how to improve the profitability, productivity and sustainability of suckler beef herds.

The report acknowledges the diversity of enterprises by explicitly outlining the reasoning, benefits and limitations of the approaches for the environment, infrastructure and set-up of different businesses – whether that's an extensive upland hill farm, a more intensive lowland enterprise and everything in between.

*Building Better Beef* is another tool to allow you to reflect on where your suckler enterprise is today and where it could be in the future with the potential adoption of new technologies and ideas.



## Game-Changer Projects

Looking ahead at the year to come, we have been planning some larger scale and innovative projects which will have a lasting positive impact on Scottish red meat businesses and will help maximise their productivity and profitability.

As well as our GHG and net zero work, we are also working to deliver QMS's three key 'game-changer projects', which are designed to grow the Scottish red meat sector.

These three projects include:

**01** Advancing work on genomics

Boosting brand integrity with world-leading assurance for customers

**02** Securing funding for a verification system for the eating quality of Scottish red meat proteins.



# Meat Eating Quality

QMS attended the Scottish Beef Association's (SBA) biennial Beef Event at Dalswinton Estate, near Dumfries, on 6 June 2023, where we launched our Meat Eating Quality study. The report, commissioned by QMS and carried out by Birnie Consultancy, was an examination of factors through the production cycle which can affect eating quality, and how eating quality is assessed in other countries. The report detailed how improved quality and consistency can be achieved on Scottish farms. These recommendations have been split into short, medium and long-term ambitions – a summary of these key ambitions are included in the table below. The work will act as a starting point for QMS in plotting a course to greater consistency, quality and profitability from our red meat. In turn, this will underpin Scotland's reputation as the choice for premium red meat.

## A summary some of the key ambitions:

Action	Short, medium and long-term ambitions
Create a programme of engagement to encourage farmers to take up best practice measures to improve eating quality	Short-term
Encourage farms to focus on optimising nutrition, health and genetics to improve carcass consistency and quality	Short-term
Enable a better feedback loop between producers, finishers, abattoirs and retailers	Short-term, Medium-term
Work with industry to develop a way to verify eating quality in processor	Medium-term
Demonstrate potential economic benefit of increased eating quality across the whole Scottish industry	Medium-term
Develop a system to reward eating quality that can be rolled out nationally	Medium-term, Long-term
Working on at UK level, develop a route map to move away from EUROP classification	Long-term



## Meat the Market

To support farmers in understanding the most effective way to market stock, QMS ran a series of workshops for producers to get up close and personal with finished animals. These technical days were based in abattoirs and involved a workshop element from Meat and Livestock Commercial Services Limited (MLCSL) to help producers become more familiar with the abattoir process and the factors which build towards greater carcass quality and profitability. After the discussion segment, producers were given the chance to grade animals, with the final grade of the carcasses later revealed. In total, we delivered three workshops to **35 producers across three sites throughout Scotland**, which supported delivery of Meat the Market content to a benchmarking group of finishers.



## Pig Sector: Health, Sustainability and Profitability

QMS provides comprehensive and industry-leading health, sustainability and profitability work in the pig sector. In 2023-2024, we also supported more than 300 pig managers and staff to complete training in movement and handling of pigs to ensure the highest standards of welfare at all times. This included 17 of the largest commercial pig producers. In addition, Allan Ward, QMS Pig Specialist, spends around 40 days a year on abattoir monitoring, taking samples for the Scottish Pig Health Scheme.



More than  
**300**  
pig managers and  
staff supported  
to complete training in movement  
and handling of pigs



**17**  
of the largest  
pig producers  
were supported



**40**  
days per  
year on  
abattoir  
monitoring



## Supporting Change: The Red Meat Supply Chain

QMS again sponsored both the Sheep Breeders Round Table and British Cattle Breeders Conference. These provide leading forums for the sectors to discuss genetics, breeding, nutrition and livestock management. We also continued to support leading animal health initiatives, including Sustainable Control of Parasites (SCOPS), Control Of Worms Sustainably (COWS) and Livestock Health Scotland. QMS also represented levy payers in livestock health initiatives, such as bovine viral diarrhoea (BVD) eradication, porcine reproductive and respiratory syndrome (PRRS) eradication, sheep scab and other animal health forums.



# Monitor Farm Scotland

The 2022-26 cohort of nine Monitor Farmers are now in year two of the four-year programme. Since the project's initial launch, 29 open meetings have been held welcoming around 1,740 attendees. Meeting topics have included animal and soil health, data collection, biodiversity, livestock performance, nitrogen use efficiency and much more, all underpinned by farmer wellbeing.

**49**  
management  
group meetings  
have taken place

Average  
group size of  
**15**

**57%** of management  
group members are aged below 45

made up predominantly of local farmers supported  
by consultants and tradespeople.

## Unlocking Data

Following an intensive data gathering exercise, which included integrated land management plans; specialist advice plans; soil sampling and analysis, the delivery team has looked to the management groups to constructively challenge the Monitor Farms.

A total of 49 management group meetings have taken place with an average group size of 15. 57% of management group members are aged below 45 and are a mixture of consultants and tradespeople, but the large majority are local farmers. Data-based decision making has been encouraged across the management groups with the launch of the livestock productivity benchmarking. Evaluation has found that 39% of management group members have made a change as a result of their involvement in the programme and 64% are intending to make a change in the coming year, setting a target for the year ahead. Local communities have welcomed the initiative with 98% of attendees intending to return to future meetings in the programme.

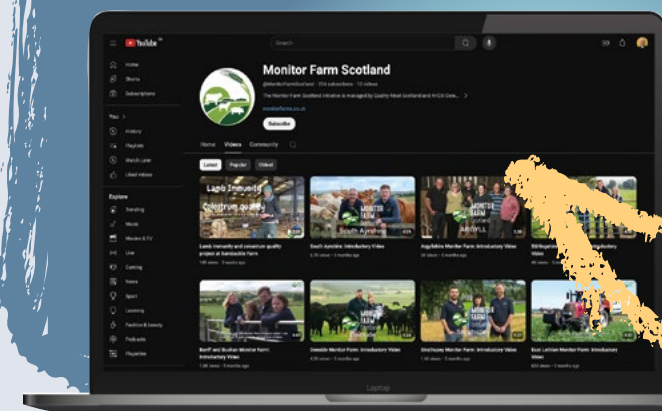
## Collaboration is Key

A dedicated Monitor Farm programme [YouTube channel](#) has been established to host digital outputs and widen the reach of the programme with nine videos released this year.

Collaboration is key, joining up with more than 20 partners from local farmers to industry stakeholders and technology innovators.

Facilitating discussions with farmers, politicians and policy makers has been a highlight for the programme's delivery team. The team has welcomed representatives from Westminster, Holyrood and local councils on to the Monitor Farms.

The Monitor Farm programme and the delivery team is led by Beth Alexander. The programme prides itself in creating an open and honest space for *Farmer Led, Farmer Driven* knowledge exchange.



Monitor Farm Scotland aims to help improve the productivity, profitability and sustainability of Scottish farm businesses.



**Beth Alexander**  
Monitor Farm  
Programme Manager



**Monitor Farm  
Programme  
Regional Advisors**  
(L-R): Peter Beattie,  
Christine Cuthbertson,  
Maura Wilson

# Market Development

## Exports

When we launched our new five-year strategy at the Royal Highland Show in June 2023, our mission statement was to make *Scotland: The Choice for Premium Red Meat*. With this in mind, we redesigned our international trade stand to complement the quality of the meat we can supply to export markets. All of our marketing materials were also redesigned to complement this premium look and feel.

The Anuga trade show, held in Cologne in Germany in October 2023, was the first event where we showcased this new design format. The show was attended by 10 of our processors and wholesalers and supported by the attendance of Mairi Gougeon MSP, Cabinet Secretary for Rural Affairs, Land Reform and Islands, and George Burgess, Director of Agriculture and the Rural Economy.

The show was an incredible success, with our attending companies reporting £22.9m of new business as a result of being at the event.

We also focused on the Middle East as we supported an exporter to access the UAE with Scotch Lamb exports. We supplied the first-ever export of Scotch lamb to the UAE for the COP 28 dinner, attended by the then First Minister Humza Yousaf. We followed this up in February 2024 with a presence at Gulfood Trade show in Dubai and provided Scotch Lamb for SDI and DBT Iftar dinners during Ramadan. We fully expect to see exports growing to this important market over the next few years.

## Scotch Beef Club

The Scotch Beef Club is open to any restaurant, hotel or food service outlet that serves premium Scotch beef. We relaunched the Club in February in Milan, Italy with an event in conjunction with Dunbia Highland Meats. Fifty restaurateurs, chefs and buyers were invited to a presentation and sampling lunch where premium quality Scotch beef was on the menu.

The event was a great success and is something we will run through 2024 with each of our exporting processors.

The Scotch Beef Club sponsors The Scottish Young Chef of the Year. The 2023 winner was Cliodhna Reid, Commis Chef at the Strathearn Restaurant, Gleneagles. Cliodhna's prize was to undertake a week's placement at the two Michelin-starred Blue Bay Restaurant at the five-star Monte-Carlo Hotel in Monaco.







## Scotch Butchers Club

Our Scotch Butchers Club now has around 270 members, mainly across Scotland but members can be found across the UK and, for the first-time, in Europe too. Sébastien Dubru, a member of the Belgian Association of Butchers and the proprietor of the renowned D'un Goût à l'Autre butchery in Belgium, has cultivated a deep-rooted appreciation for high-quality Scotch meat and Sébastien was delighted to become the first European member of the club.

To promote a career in butchery to a new generation of potential apprentices, we ran a butchery careers campaign across social

media and digital channels in early 2024 that feature some newly appointed brand ambassadors. Our aim is to showcase that butchery is a rewarding career choice for new entrants.

We also held a number of educational events, such as farm visits and added value product development sessions for butchery apprentices. With the support of the team at Browns Food Group, we hosted a study tour to Dublin to visit the best butchery retailers in the city. Scotland's most forward-thinking butchers joined us to meet the Irish retailers and talk all things butchery.

## Retailer Support

We regularly meet with the UK's grocery retailers to promote the QMS brands and ensure we are aligned with the retailers seasonal marketing campaigns and category objectives. We routinely provide

retailers with insights and analysis into the Scottish market and Scottish consumers.

The United Kingdom Geographical Indicator (UK GI) became a legal requirement from 1 January 2024 for products

containing Scotch Beef and Lamb to carry the UK GI logo.

GI protection guarantees a product's characteristics or reputation, authenticity, and origin. It also protects the product name from misuse or imitation.



## Buyers Visit Scotland

We regularly provide support to our industry and levy payers when they invite potential buyers to visit Scotland. It's our job to help educate buyers on why they should choose Scotch red meat and why they should be encouraged to pay a little bit more for a premium quality product that is produced in one of the most sustainable places on earth to raise livestock. This year, we welcomed buyers from around the globe as part of the Showcasing Scotland event, held in conjunction with our partners at Scotland Food and Drink and Scottish Development International. We also welcomed buyers from Germany, France, Netherlands, Italy and Belgium to visit farms and processors in Scotland and to learn about what sets Scotch red meat apart from its competitors.

# Public Affairs

Public Affairs is a developing function of QMS and, as a non-departmental public body (NDPB), is advisory, based on independent data, rather than as a lobbying organisation.

Throughout 2023 we engaged with politicians across parties at Holyrood and Westminster, with more than 20 face-to-face meetings as well as written briefings and evidence sessions highlighting the key challenges and opportunities which the red meat supply chain in Scotland faces. We emphasised the impact the sector has across parliamentary portfolios, not only rural affairs, and outlined the role it plays in each constituency.

## Farm Visits

Ariane Burgess MSP, of the Scottish Green party and member of the Rural Affairs and Islands Committee, visited the **Strathspey Monitor Farm at Auchernack** in the Speyside Valley.

Organised by QMS and Malcolm Smith, a Monitor Farmer at Auchernack, the visit was aimed at highlighting the importance of cattle and sheep in maintaining diverse habitats on this award-winning upland farm.

Ariane, Malcolm and members of the Monitor Farm Management Group shared thoughts and ideas on net zero policy, biodiversity, public goods and the vital role of farmers in the sustainable production of quality livestock.

Kate Rowell, Chair of QMS, was also delighted to welcome Central Scotland Labour MSP Monica Lennon, a member of the Scottish Parliament's Net Zero, Energy and Transport Committee, to a **livestock farm near Linlithgow** to talk about sustainability and the road to net zero. They were hosted by James Hamilton, a farmer whose work on cutting back fertiliser and growing his own feed is already making his farm more efficient and reducing its carbon footprint.



## Industry Breakfast and South Ayrshire Farm Visit

QMS hosted an industry breakfast at the Royal Highland Show, featuring an update from the Cabinet Secretary for Rural Affairs, Land Reform, and Islands, Mairi Gurgeon MSP (pictured left).

Following on, Ms Gurgeon visited John and David Andrew at Rowanston farm, South Ayrshire, to hear about the positive work being achieved on Scottish farms through the Monitor Farms Scotland programme. Read more on this on [page 21](#).

Ms Gurgeon said: "Innovation, sustainability and peer-to-peer support in the agricultural sector is vital to ensure we are optimising food production while meeting our climate change and biodiversity ambitions. The Monitor Farm Scotland programme is critical in our efforts to achieve this vision for Scottish agriculture. I look forward to seeing the tangible benefits that initiative's ongoing work has on the sector."

## Dumfriesshire Monitor Farm

At the Dumfriesshire Monitor Farm, Scotland Office Minister John Lamont MP heard from Richard McCornick and his partner Hayley Currie who run Barnbackle Farm with Richard's parents, Andrew and Janice McCornick.

Beth Alexander, Monitor Farm Scotland Programme Manager, said: "We were delighted to welcome Minister Lamont to the Dumfriesshire Monitor Farm and showcase the work we are doing on one of the nine farms in the programme with rotational grazing, sheep management strategies, and upcoming projects like the 2024 lambing initiative in collaboration with the local vet practice and the University of Glasgow."





## Ayrshire Monitor Farm Meeting

In January, John and David Andrew, of the South Ayrshire Monitor Farm, hosted Mairi Gougeon, Cabinet Secretary for Rural Affairs, Land Reform, and Islands, along with Kate Rowell, QMS Chair, and Beth Alexander, Monitor Farm Programme Manager.

Beth said: "We talked Ms Gougeon through what each Monitor Farm had completed in the programme to date, including soil sampling."

A range of business challenges were also discussed, such as seasonal land availability, climate change and a reduction in labour from family members.

Beth added: "The Andrews' aim is to continue to produce quality Scotch products but with reduced inputs and cost of production. To achieve this the family is considering the opportunities presented to them such as technological advances in agriculture."



## Lamb for St Andrew's Day Activity

QMS facilitated lamb being served in the Scottish Parliament for all members and staff on St Andrew's Day on 30 November. The Institute of Auctioneers and Appraisers in Scotland (IAAS) and QMS were also in attendance to discuss the importance of the Lamb for St Andrew's Day initiative and Scotch Lamb to the wider Scottish economy. The National Sheep Association completed the celebrations with a St Andrew's Dinner in Lauder, supported by QMS.



## Parliamentary Updates

In March 2024, QMS Chief Executive Sarah Millar provided evidence to the Scottish Parliament's Constitution, Europe, External Affairs and Culture Committee. The committee is reviewing trade relations with the EU post-Brexit and sought insights from the red meat sector regarding trading conditions after the UK departed from the EU.

During the session, the committee heard from Jonnie Hall, Director of Policy at the National Farmers' Union of Scotland (NFUS), Ed Barker, Head of Policy and External Affairs at the Agricultural Industries Confederation (AIC), and Sarah Millar.

Sarah highlighted that while red meat exports from Scotland to the EU had recovered near to their pre-EU exit levels, the profile of those exports had changed, with some smaller exporters still effectively shut out of the European market. Exporting to the EU now comes with significant increased cost, particularly because of the need for export health certificates, and increased

risk to logistical efficacy. Sarah noted that a veterinary agreement with the EU, which would reduce the number of physical checks at the border, would help meat exporters while still protecting consumers and border biosecurity.

You can watch the committee meeting on [📺 Scottish Parliament TV](#).

Sarah also had a meeting with Daniel Johnson MSP, Shadow Secretary Enterprise and Business, and Michael Marra MSP, Shadow Cabinet Secretary for Finance, to discuss the economic contribution and opportunity for the red meat supply chain in Scotland.

Our Chair Kate Rowell also met Daniel Zeichner MP, then Shadow Minister for the Environment, Food and Rural Affairs, to discuss the continuing impact of Brexit, agricultural payments and food labelling.

In addition, QMS responded to numerous consultations across the Scottish and UK parliaments and provided both written and oral evidence to several committees.

# Financials

The full Annual Report and Accounts for the financial year ended 31 March 2024 is available on the QMS website at [www.qmscotland.co.uk](https://www.qmscotland.co.uk) or you can request a copy by telephoning 0131 510 7920.

## STATEMENT OF COMPREHENSIVE NET EXPENDITURE

For the year ended 31 March 2024

	2023-24 £	2022-23 £
<b>Income</b>		
Statutory red meat levy	4,906,978	5,179,264
Consumer assurance scheme fees	1,548,646	1,483,481
Other income	361,179	326,649
Total operating income	6,816,803	6,989,394
<b>Expenditure</b>		
Staff employment and board costs	1,767,080	1,785,448
Depreciation	41,261	47,520
Other operating costs	4,774,040	4,961,517
Total operating expenditure	6,582,381	6,794,485
<b>Net operating expenditure</b>	<b>234,422</b>	<b>234,422</b>
Interest receivable	21,938	3,177
Interest payable	2,604	3,392
<b>Net expenditure for the year</b>	<b>253,756</b>	<b>194,694</b>



**STATEMENT OF FINANCIAL POSITION**

As at 31 March 2024

	2024 £	2023 £
<b>Non-current assets</b>		
Furniture, fittings and equipment	34,141	40,464
Intangible assets	13,200	17,600
Right-of-use assets	28,892	43,967
<b>Current assets</b>	<b>76,233</b>	<b>102,031</b>
Trade receivables and other current assets	1,235,513	1,751,208
Deposits and advances	405,644	251,922
Cash and cash equivalents	889,422	551,593
<b>Total current assets</b>	<b>2,530,579</b>	<b>2,554,723</b>
<b>Total assets</b>	<b>2,606,812</b>	<b>2,656,754</b>
<b>Current liabilities</b>		
Trade payables and other current liabilities	674,328	962,282
Lease liabilities	16,756	15,744
<b>Total current liabilities</b>	<b>691,084</b>	<b>978,026</b>
<b>Non-current liabilities</b>		
Lease liabilities	16,305	33,061
Deferred income	172,229	172,229
<b>Total non-current liabilities</b>	<b>188,534</b>	<b>205,290</b>
<b>Assets less liabilities</b>	<b>1,727,194</b>	<b>1,473,438</b>
<b>Reserves</b>		
General reserve*	1,727,194	1,473,438

\*This planned surplus, attributable to our organisational restructure and transitional period, has been reinvested into the 2024/25 financial year; supporting our new consumer marketing campaign.

**SEGMENTAL REPORTING**

For the year ended 31 March 2024

	2023-4 Total £	2022-23 Total £
<b>Income</b>		
Statutory red meat levy	4,906,978	5,179,264
Consumer assurance scheme fees	1,548,646	1,483,481
Grant income	338,207	228,169
Ring-fenced funding	0	65,569
Miscellaneous income	22,972	32,911
Bank interest	21,938	3,177
<b>Total</b>	<b>6,838,741</b>	<b>6,992,571</b>
<b>Direct expenditure</b>		
Marketing and Communications	2,202,362	2,464,019
Industry Development	839,439	855,928
Market Intelligence	482,891	553,659
Assurance Scheme operating costs	1,774,930	1,689,697
Market Development	454,834	443,776
Corporate Services	830,529	790,798
<b>Total</b>	<b>6,584,985</b>	<b>6,797,877</b>
<b>Surplus / (deficit) on ordinary activities</b>	<b>253,756</b>	<b>194,694</b>

➔ [Click here](#) to read the Independent auditor's report to the members of Quality Meat Scotland, the Auditor General for Scotland and the Scottish Parliament.



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