

Quality Meat Scotland

Impact Summary

April-September 2024



“We’re just getting started on making Scotland the choice for premium red meat”



SARAH MILLAR, Chief Executive, QMS

“At the Royal Highland Show (RHS) in summer 2023, we unveiled our vision to make Scotland the choice for premium red meat by driving consumer demand for our Scotch and Specially Selected brands, fostering a profitable and innovative supply chain supporting jobs and communities across the country, and building a global reputation for sustainable red meat.”

“From April 2024, our vision to make Scotland the choice for premium red meat by driving customer and consumer demand for our Scotch and Specially Selected brands, fostering a profitable and innovative supply chain, supporting jobs and communities across the country, and building a global reputation for sustainable red meat formally commenced.

“I’m delighted to have our organisational structure and plans in place to drive forward and start delivering this five-year Strategy to 2028...

“Being here for levy payers and QMS members across the red meat supply chain, profitability and productivity is at the heart of what we do. We want

to regularly share the work we do to support industry confidence, commercial success, consumer demand and positive global perception. That’s why we will be publishing these new summaries throughout the year, as well as an end of year report to showcase our impact for the Scottish red meat sector.

This instalment summarises the first half of 2024/25 from April to September 2024. Naming just some highlights in these six months, we:

- Continue to supply a **growing evidence centre** for industry through the publication of the Red Meat Industry Profile as well as ongoing, regular data, insight and briefings on market and price conditions.

Where we are in our 5 Year Strategy:

April 2024

10%

6 months

March 2029

60 months

- Supported more than 130 guests at Holyrood for the newly constituted **Food and Agriculture Stakeholder Task (FAST)** reception, stimulating discussion and understanding with Members of Parliament about what is needed to promote sustainable and profitable agricultural production in Scotland.

Launched not one, but two consumer marketing campaigns including:

- Award-winning 'Meat & 2.0' – encouraging people in Scotland to reimagine the tradition of 'meat and two veg' after research reveals almost one-third (30%) report bad memories of meat and two veg mealtimes due to soggy vegetables and overcooked meat.
- 'When You Know You Know' what's behind the label – launched in September and developed with our new creative agency, Multiply highlighting to consumers the QMS whole of life, whole of supply chain quality assurance behind the Scotch Beef, Scotch Lamb and Specially Selected Pork logos.

Went 'all around' the Royal Highland Show over the four days in June with our:

- Main stand for industry and business breakfasts which drew hundreds of stakeholders and had presentations from First Minister John Swinney, Cabinet Secretary for Rural Affairs, Land Reform and Islands Mairi Gougeon and strategic net zero advisor and innovator Professor John Gilliland.
- Lidl and Aldi consumer partnerships.
- Our Health and Education Team highlighting red meat nutrition and farming at the Royal Highland Education Trust (RHET) stand and Porktober children's competition.
- Scotch Butcher Club sponsorship of the Food for Thought Cookery Theatre.

Launched key initiatives for positive community engagement:

- Commenced landmark sports and communities partnership with Glasgow Warriors and Edinburgh Rugby.
- Set up the Scotch Ambassador Scheme, with 30 skilled and passionate people

signed-up to support our reputational work across all regions in Scotland.

- Reached thousands of school pupils in Scotland through cookery demonstrations.
- The return of the popular Meat Voucher Scheme supporting red meat in schools, drawing in hundreds of applications.

Supported business development with:

- An engaging series of Monitor Farm knowledge exchange events throughout Scotland covering topics of interest such as body condition scoring, finishing, building resilience, net zero and sustainability.
- Ran four Meat the Market sessions, designed to provide farmers with essential knowledge on carcass grading, market specifications, and customer requirements.
- Promoted our brands to chefs and food industry professionals at the well-attended Universal Cookery and Food Festival (UCFF).

Sarah Millar, Chief Executive, QMS



This is just a snapshot of the work that goes on to support our fundamental **£2.8 billion red meat sector** employing more than **39,000 people** in Scotland, and we're only getting started in our ambitions to see the industry thrive.

Progress on Strategic Indicators

PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
Provenance	% of total beef, lamb and pork marketed under the Scotch or specially selected pork brand	This is tracked monthly through Royal Statistical Society (RSS) audits. At August 2024, there was 56.5% Scotch Beef, 31.2% Scotch Lamb and 2.4% Specially Selected Pork (SSP) in Scotland.	<ul style="list-style-type: none"> – New Tactical Brand Campaign Meat & 2.0 - encouraging consumers to reimagine the tradition of 'meat and two veg' after research reveals almost one-third (30%) report bad memories of meat and two veg mealtimes. This award-winning campaign ran across press, radio, digital and social media and reached nearly 2.5m adults in Scotland. – Launch of 'When you know you Know' campaign to educate and inspire consumers on what's behind our blue labels, and reached over 70% of adults in Scotland using a mix of TV, STV Player, Outdoor, News partnerships, Digital and Paid Social ads and was supported with PR activity. – Strong presence at the 2024 Royal Highland Show – QMS 'all around the show at main stand and our Lidl and Aldi partnerships. – Love Lamb Week in collaboration AHDB, HCC and LMC celebrating lamb's naturally delicious flavour and versatility, encouraging the nation to try lamb in different ways. – £50,000 Community Marketing Fund - 12 grants issued between April and September Scotland-wide. – The art of the BBQ Guide - 26k copies distributed to Scotch Butcher Club members for their shops and shared widely online as download. – We set out to Make it a Sizzling Summer with our Bauer radio campaign which delivered 19.5m opportunities to hear about our Scotch Beef, Scotch Lamb and Specially Selected Pork brands. We also ran a BBQ campaign on Facebook and Instagram to support this. – Re-established our consumer press office following the appointments of two marketing and communication agencies (Multiply and Stripe) - secured 82 pieces of content / coverage equating to 461K in media reach and 598K in social media following reach. – Drop-in clinics across key Scottish livestock marts were successful in engaging with members on all things QA. – The Cattle & Sheep Standards review process has officially commenced, marking an important step in ensuring the standards remain relevant, robust, and reflective of industry best practices. Members have been actively involved throughout the review, with strong industry representation on the Standard Setting Body.
	Consumer brand awareness, brand perception and propensity to purchase	In September 2024, brand recognition increased on Scotch Beef and Scotch Lamb to 83% (78% Jan) and for SSP to 52% (35% Jan). These increases suggest campaigns over the last nine months have had a positive effect, especially for the Specially Selected Pork brand, demonstrated by uplifts in key brand health measures: brand you can trust 53% (from 14%), a healthy product 48% (from 17%) and good value for money 44% (from 13%).	
	An increased proportion of lamb reared in Scotland will be processed in Scotland	This will be tracked annually – 2023 figure: 34.9% of Scottish-born lambs slaughtered in Scotland.	
	Increase in % of total livestock population covered by Quality Assurance	This will be tracked annually – 2023 figure: 97.2% of prime cattle and 91.4% of prime lambs and hogs.	

PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
Productivity & Profitability	A greater proportion of output going to export markets	We have reported that the total value of Scotland's red meat and offal sold outside the UK has reached £137 million, reaching a value above £100 million for the first time on record.	<u>Market Building</u> <ul style="list-style-type: none"> – Scotch Beef Club members – acclaimed Scottish Bar and Restaurant Group, Buzzworks Holdings became first group member and Hearts FC became first Scottish football club to join. Relaunch is going well with approx. 50 locations now signed up. – Aldi expansion of Specially Selected Pork range.
	Increase in partnership projects/aligned marketing projects with multiple retailers	Ongoing meetings with retailers and processors to discuss marketing opportunities, with some positive conversations on the back of the new consumer campaign around in store activation and point of sale.	<u>Exports</u> <ul style="list-style-type: none"> – Universal Cookery and Food Festival (UCFF) Gold sponsor - 400 attendees actively engaging with chefs and food industry professionals to promote the quality, sustainability and provenance of the brands. – John Gilmour Butchers successful launch of Scotch Beef to the London foodservice and hospitality market at a prestigious event at Dover House. The exclusive event took place by permission of the Secretary of State for Scotland, Ian Murray MP, and brought together close to 100 key figures from the culinary, hospitality and political sectors, including Scottish MPs.
	Increase in total output sold to independent retail	Estimated share of red meat processing turnover rose from 7.1% in 2022 to 7.7% in 2023 based on the processor survey (N.B. includes estimates for non-response).	<u>Developing skills across supply chain</u> <ul style="list-style-type: none"> – QMS and industry partner butchery demonstrations – to hundreds of industry stakeholders at the Food for Thought Cookery Theatre at the Royal Highland Show. – Butchery apprentice opportunities – provided L&D on product innovation and value-added products to 24 apprentice butchers across Scotland at events in Dundee and Larkhall. – Knowledge transfer day - at Kilmacoll Farm Tours, bringing together almost thirty members of The Scotch Beef Club and The Scotch Butchers' Club with a focus on the unique qualities of Scotch red meat and importance of supply chain join-up and cross- collaboration. – First all-female cohort of Scottish butchery business managers and colleagues visited leading Northern Irish butchers. – Four 'Meat the Market' workshops with stakeholders including Dunbia Highland Meats, John Munro Ltd, and Morrisons Woodhead Brothers, designed to provide farmers with essential knowledge on carcass grading, market specifications, and customer requirements.
	Increased output from breeding herds and flock	June 2023 estimates rising calving and lambing rates over time.	<u>Net Zero</u> <ul style="list-style-type: none"> – On-farm environmental baselining pilot in partnership with AHDB expressions of interest announced, which will include Scottish livestock farms. – Net zero open days - held in July and August in collaboration with the AgriScot Beef and Sheep Farm of the Year award winners, with almost 100 combined attendees. – Scotsheep – QMS was leading sponsor and delivered a seminar on the opportunity of net zero and QMS's work to support businesses across the supply chain to achieve it, as well as practical butchery.
	Increased engagement with on farm initiatives such as Monitor Farm / Meat the Market	Several successful Monitor Farm events and knowledge exchange sessions have taken place across the regions in Scotland. Impact and engagement so far has been shared in a Monitor Farm half way report, which highlights more than 1,000 farmers have been connected and 48 meetings have been held in the first two years.	<u>Monitor Farm Programme</u> <ul style="list-style-type: none"> – Four summer meetings – focused on forage and finishing cattle (Deeside); building resilience with Farmstrong Scotland (Roxburghshire); grazing and managing time (Argyllshire); and growing for optimum output (Dumfriesshire). – Two summer open days - at award-winning farms for farmers and crofters to learn about practices aimed at improving profitability and efficiency while also reducing carbon emissions. – One autumn meeting – Strathspey on cattle condition scoring, nutrition, winter housing preparation and back-end grazing.
	Increase in partnership projects with processors	Ongoing meetings with processors to promote the marketing funds available. Impact and engagement will be tracked annually.	

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

Anna Forbes,
Sheridan's Butchers



LAUNCH OF SCOTCH
AMBASSADOR SCHEME

30



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



Cookery
demonstrations
reaching more than



3000

SCHOOL PUPILS



PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
Planet & Place	Every Quality Assurance member engaged with an emissions reduction programme	We are discussing access to Scottish Government carbon audit data.	<ul style="list-style-type: none"> – Environmental Baselineing project with Agriculture and Horticulture Development Board (AHDB) - 22 beef, lamb and pork farms in Scotland selected to take part in pilot. – Publication of the Red Meat Industry Profile, presented to an industry audience at the Turriff Show. – Cattle numbers projection model and industry presentation at annual SAMW conference including economic opportunities. – Monthly market updates, weekly price reports and regular bespoke briefings for stakeholders. – Scottish Red Meat Resilience Group - policy-focussed, 11 stakeholder attending across red meat supply chain. – Collaboration with the Scotland Food and Drink policy working group to produce a policy prospectus. – Launch of landmark sports and communities partnership with Glasgow Warriors and Edinburgh Rugby. – Launch of Scotch Ambassador Scheme - 30 passionate individuals from red meat and education sectors to share positive messages across Scotland. – Various health and education events across Scotland including RHET food and farming days, SRUC's 'Be a Farmer' event, MooFest as well as RHET teacher training. – In-school cookery demonstrations reaching more than 3000 pupils in Scotland. – Launch of popular Meat Voucher Scheme with hundreds of applications. – Various positive press commentary on red meat in response to misleading research and information including blanket public health messages to cut red meat consumption and red meat in schools. – Appointment of Director of Communications and External Affairs (C&EA), Holly McLennan and development of C&EA Strategy.
	Environmental progress is articulated and visible through our brands	22 Scottish livestock farms (20 beef and sheep, 2 pig) selected to take part in net zero Environmental Baselineing Project in partnership with AHDB.	
	Scottish public perception is favourable towards the Scottish red meat sector	A survey was completed in January 2024 to obtain baseline data on current public perception to benchmark against for future waves. Next survey likely early 2025.	

PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
People	Positive perception of QMS amongst stakeholders	Communications and External Affairs Strategy developed with focus on showcasing the value of our work on industry's behalf as well as telling the positive red meat story more broadly. We will seek feedback from stakeholders through industry strategy and take a continuous improvement approach.	<ul style="list-style-type: none"> – Food and Agriculture Stakeholder Taskforce (FAST) reception at Holyrood - supported more than 130 guests at FAST Holyrood reception, stimulating discussion and understanding with MSPs about "championing Scottish agriculture", highlighting the contribution the sector makes to Scotland's economy and what the next generation needs from policy-makers to make it a viable business path for the future. – Series of engagements with MSPs and MPs in the key political parties, with visits across the Scottish red meat supply chain - Around 10 one-to-one MSP and MP engagements between Aug and Oct. A further 25 at supply chain events. – 10 consultation responses covering food labelling proposals to bionergy to cattle ID and traceability. Industry briefings including postbudget scrutiny and EU Deforestation Regulations. – Ongoing industry products including QMS weekly newsletter and monthly podcast.
	Positive perception of QMS amongst levy payers	Informing industry and levy payers is a key objective in the new Comms & External Affairs Strategy and useful and engaging industry products are implemented on a weekly and monthly basis including the QMS newsletter, social media channels, website and podcast. We will seek feedback from industry on these communications and take a continuous improvement approach.	Significant internal comms / culture / values activity.
	QMS is viewed by employees as a great place to work	Employee survey conducted prior to internal insights workshop: the results were very positive and we will take and build on these going forward.	
	Positive perception of QMS amongst decision makers	We have engaged in designing an MP / MSP survey which will be carried out at the end of 2024, ahead of a full results report early in 2025.	

**MORE
THAN
130 GUESTS**



at FAST Holyrood reception.

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

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



22

BEEF, LAMB AND PORK FARMS

in Scotland
selected to
take part in
environmental
data pilot



“ It has increased
my understanding
which will show
up in my carbon
audits. ”

*Farmer survey feedback
following net zero open day*



MORE INFO:

Did you know that you can keep informed on the latest QMS and red meat sector news and updates by subscribing to our weekly newsletter and industry podcast? Sign up here:

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Got any feedback on our new impact summaries? Is there anything you'd like to see us report on in future iterations? Get in touch and let us know –

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