



Quality Meat Scotland
Corporate Business Plan
2024-25



Contents

Corporate Business Plan 3

Overview	4
Welcome	4
Introduction	5
Purpose of this Document	6
Scottish Red Meat Sector Situation Analysis	7
QMS Strategy 2024-2028/29	12
Implementation Plans Pre Department	14
Key Deliverables Per Department	18
Staff Resources	18
Key Delivery Partners	19
Scottish Government National Performance Framework	19
Relationships with other Stakeholder Strategies	20
QMS and Programme for Government Themes	21
Review of Past Performance	21
Statement on Information and Communications Technology	22
Statement on Public Bodies Climate Change Duties	22
Statement on Equality	23
Levy Rates for 2024-2025	23
Income & Expenditure Budget 2024-2025	23
Balance Sheet Budget 2024-2025	24
Appendix A - Board and Corporate Governance	25
Appendix B - Strategic Management Team	28
Appendix C - QMS and the Scottish Government's National Performance Framework	28

Corporate Business Plan



Corporate Business Plan

Welcome

from Chair Kate Rowell

It seems that the only constant is change these days, whether it is on a global, national or a sector basis. We have navigated many issues over the last few years, not least Brexit, rampant inflation and volatile prices. And yet they continue, with changes to Scottish agricultural policy and challenging weather being two major factors currently affecting our sector. Scotland's red meat industry – from farm to fork – is nothing if not resilient, as we have shown throughout many previous challenges and times of change; QMS is dedicated to ensuring that our industry is placed on a strong footing, whatever we face.

We started the year fulfilling one of the initiatives promised as part of our new five-year strategy which was launched at last year's Royal Highland Show. Our wide-ranging advertising campaign, including our new TV advert, radio advertising and social media initiatives, is critical at a time when consumers are so cost-conscious. Telling the positive story about Scotland's red meat means ensuring they are aware of the quality, provenance and health benefits of Scotch Beef, Scotch Lamb and Specially Selected Pork – their inCREDible credentials.

It has been heartening to see these first initiatives springing from QMS's new five-year strategy. Our CEO Sarah Millar and I consulted widely with levy payers during a series of 13 in-person workshops across the country as well as sitting down with each of the processors, and an online meeting for those unable to attend their local meeting. We had a positive response to the strategy, and to our proposal to increase levy rates in order to ensure we can continue to champion Scottish red meat in highly competitive home and export markets. The last levy increase was in 2010, and a sufficiently-funded sector body is essential in order to deliver these aims and ensure our industry's future is not compromised.

As part of the strategy, we have set our mission to drive demand from consumers who recognise our brands as a mark of integrity. Implementing this will see us focus on three game-changing projects; developing a world-leading system for verifying

eating quality of Scottish red meat; building a genomic database to help drive productivity and profitability and cement customer integrity; and as already mentioned, focussing on marketing and communicating the integrity, provenance and sustainability of our brands.

Strategy work has started in earnest, and 2024 will be a time of exciting developments. We have already adapted team structures in order to fulfil our strategy promises, are committed to communicating with levy payers, and are building on our work to ensure Scotland's red meat sector is at the forefront of positive discussion with key stakeholders and politicians, as well as with existing and new customers at home and overseas.

When we launched the strategy, I said that we, as an industry, needed to embrace a new attitude of confidence and unity, and I believe this is what we should strive for this year.

There are many other countries competing for our markets, at home and overseas, but we are on the front-foot. We have an exciting, ambitious strategy, a brand story which is being strongly told and new opportunities already emerging in our drive to make Scotland the choice for premium red meat.

Scotland needs a productive, profitable and sustainable red meat sector and we will continue to work hard to help achieve this in 2024.

Kate Rowell
Chair



Corporate Business Plan

Introduction

from Chief Executive Sarah Millar

We were proud, on behalf of everyone in the Scottish red meat sector, to launch our five-year strategy at the Royal Highland Show in June 2023. This strategy has set the direction and focus for our business plan for 2024-25 and beyond.

Our mission is to foster profitable and innovative supply chains which support jobs and communities across the country; all delivered by creative, ambitious organisations that harness the talent of their people and support individuals throughout the industry. This is how we will realise our mission to make Scotland the choice for premium red meat.

Success will be an industry with greater confidence, with profitability and productivity at its heart, delivering a product high in demand, viewed by our key customers – here and overseas – as their first choice. Over the next five years, three pillars of work will define our activity: provenance; productivity and profitability; and planet and place.

I have continued to ensure communication with levy payers is a priority, building on the meetings held in my first year of tenure with second series of face-to-face meetings across the country alongside QMS chair Kate Rowell to discuss our new strategy and levy increase proposal. These meetings, and many other formal and informal discussions, provide valuable thought, feedback and direction to ensure Scotland's red meat sector continues to thrive and look forward to a positive future, despite the challenges.

This Corporate Business Plan for QMS, an executive non-departmental public body of the Scottish Government, is prepared in line with the requirements for a public body and sets out our strategic ambitions on behalf of the Scottish red meat industry for the period 2024– 2025. These are published on the QMS website www.qmscotland.co.uk.

QMS is funded by levy from Scotland's beef, lamb, pork producers and processors who make an important contribution to the country's rural economy, contributing over £2.1 billion to the annual GDP of Scotland and supporting around 50,000 jobs in the farming, agricultural supply chain and processing sectors.

We market the GI (PGI) labelled Scotch Beef and Scotch Lamb brands in the UK and abroad and promote Scottish pork products under the Specially Selected Pork Banner. Our brands are underpinned by our internationally recognised assurance schemes which cover more than 90% of livestock farmed for red meat in Scotland. They offer consumers in the UK and overseas the legal guarantee that the meat they buy has come from animals that have spent their whole lives being raised to some of the world's strictest welfare standards.

As an organisation, QMS is proud to deliver and promote authentic, trusted brands, underpinned by quality assurance, which give Scottish red meat a competitive advantage. We are a key part of driving the development of key markets and fostering a culture of innovation which provides practical tools and insight to drive profitability across the supply chain. And we are proud to build Scotland a global reputation for sustainable red meat production, which enhances the environment and place from which it comes.

Sarah Millar
Chief Executive



A photograph of two brown cows in a grassy field. One cow is in the foreground, facing the camera, with a yellow ear tag that reads '70 339'. Another cow is partially visible on the left. The background shows a blue body of water under a clear sky.

3.0 Purpose of this Document

The purpose of this corporate business plan and associated implementation plan is to inform Scottish Government and other key stakeholders of our strategy and operations for 2024 – 2025. We have analysed the current red meat sector environment, identified the key areas where QMS can make a positive impact, agreed our strategic aims and detailed what we will do during this financial year to work towards their achievement.

4.0 Scottish Red Meat Sector Situation Analysis

The following summary details the current situation faced by the Scottish red meat sector; however, unpredictable risks and issues tend to arise which we will need to address during the financial year.

Beef Market

Farmgate prices have risen slightly in early 2024, signalling firm underlying demand given the rise in availability from 2022's spring calves reaching peak slaughter age. R4L steers traded at £5.06/kg dwt in the week ending February 3, a lead of around 7% on a year earlier and of 27% on the five-year average; though still below the peak reached in May 2023 (£5.12/kg). As is often the case in the first quarter of the year, the Scottish premium has eroded, as the dominance of spring calving beef herds provides an extra boost to availability.

Unlike prime cattle prices, cow prices remain lower than a year earlier (-8%), when they had been unusually close to prime cattle values despite elevated cow slaughter. This rebalancing points to some return of demand towards prime beef due to improved economic sentiment.

Reduced input costs and strong finished cattle prices continue to support store cattle prices. While there could be a slight uplift in yearlings at spring sales, reflecting a 1% year-on-year uplift in cattle aged 6-12 months in October 2023, those aged under six months were down 4.9%, signalling a sharp squeeze on longer keep cattle at spring sales and then yearlings in the autumn. A slight rebound in the 2024 calf crop could offset some of the tightness in autumn 2024 and spring 2025, though numbers are set to remain below pre-2023 levels.

In theory, a period of positive market returns for store and finished cattle producers should generate confidence and support some recovery in the beef

herd following the contraction of 2022/23. However, ageing demographics and succession challenges, plus uncertainty over future agricultural support may limit the potential for rebuilding.

Ireland's June census reported declines of 1.4% in the 1-2 year old category and 2.8% in cattle under a year old, signalling limited potential for UK import growth in 2024 and 2025. However, imports from Australia rose from an average of less than 50t per month between January and May 2023 to over 300t per month in the autumn, in a sign that the increased quota granted at the end of May under the Free Trade Agreement is beginning to be used. However, shipping challenges could test this uplift in imports from Australia. EU beef production has been projected to contract by 1% in 2024 by the EU Commission, on the back of a 3% reduction in 2023, and EU imports are forecast to increase by 5% in response.

After a sluggish first three quarters of the year, UK exports picked up seasonally and volumes reached an eighteen-month high in November. Export prices also held firm, highlighting a strong export trade, which fundamentally tight EU supply suggests could continue.

Although global beef consumption has been forecast to fall marginally in 2024 by the USDA, mismatch between supply and demand in major beef producing and consuming countries will continue to support trade flows.

Beef Supply

Prime cattle slaughter fell by nearly 7% at Scottish abattoirs in 2023, driven by the past rise in the store cattle outflow to England, the proportion of the herd slaughtered falling back from the highs of 2022, and supply chain challenges. As a result, the volume of beef able to carry the Scotch Beef label was restricted. Although seasonally firm at the start of 2024, prime slaughter is estimated to have fallen around 9% below January 2023 levels, reflecting changes in the supply chain rather than a reduction in prime cattle on Scottish farms.

Critical mass in the beef sector

Critical mass will differ between individual processing sites and the industry as a whole, but with the processing sector already operating on thin operating margins and well-below capacity, there is a significant risk posed by further reductions in prime cattle supply. It could lead to range rationalisation in the retail sector where a reduced availability of Scotch-eligible product could no longer make it economically justifiable to segregate product within the supply chain and retain a Scotch offer on the retail shelf at a competitive price.

Lamb Market

The lamb market has made a very strong start to 2024, driven by tight supply and firm demand. Across GB, fewer lambs were born in spring 2023 but abattoirs throughout held up relatively well in the second half of 2023, resulting in a reduced carryover of hogs. At the same time, retail sales had a strong end to 2023, with a stabilisation in retail prices meaning that an increased amount of money spent buying lamb translated into a higher volume sold. In the second half of January, hogg prices traded just above the £2.90/kg mark at Scottish marts, before rising towards £3.10/kg lwt at Scottish marts in early February. At this level, they are around 35% higher than last year and 30% above the five-year average.

External trade pressures are likely to have continued to support market returns at the start of 2024. On the export side, HMRC figures showed an 11% year-on-year uplift in export volumes in the first eleven months of 2023, removing supply from the domestic market. Since then, prices paid for GB lamb at Rungis wholesale

In the short-term, a slowdown in the outflow of store cattle to England from the highs of 2022 could support supply along with an increased spring calf crop from 2022. As the year progresses, availability is set to tighten as the reduced spring calf crop of 2023 (-2.5%) reaches the market, continuing into 2025 when these cattle reach peak slaughter age. However, the declines could be limited by a rebound in the proportion of the herd being slaughtered from a sharp fall in 2023.



market in Paris have risen further beyond year-earlier levels, suggesting strong demand.

After a weak start to the year, UK lamb imports posted year-on-year growth between August and November. Nevertheless, they were still below the levels regularly seen between 2010 and 2017. The rebound reflected increased market access accruing to Australia on May 31 under the Free Trade Agreement, plus highly competitive Southern Hemisphere pricing, driven by increased lamb production in Australia and weak consumer demand in China. In 2024, this access level has risen further, raising the level of market risk. However, in the short-term, Red Sea shipping challenges will have delayed imports, driving up demand for domestic product from traders concerned about finding themselves short of supply. With a similar situation in the EU, where supply is fundamentally tight due to a downwards trend in lamb production, this could be adding momentum to UK exports.

Lamb Supply

Over the past decade, Scotland's ewe flock has trended slightly downwards. In 2023, this continued, and numbers are estimated to have fallen by 1.7% on 2022. A 4.1% reduction in the 2023 lamb crop suggests that this trend could continue in 2024 due to the limited availability of replacements. However, after a difficult



lambling in 2023, positive sentiment around scanning results in early 2024 points to a rebound in the lambing rate and some recovery in 2024/25. Lamb numbers fell even more significantly in England and Wales in 2023 but a strong rebound is expected due to improved ewe condition at mating in autumn 2023.

Lamb Processing

At Scottish abattoirs, lamb slaughter fell by 17% between 2019 and 2022, with a further 6% reduction in 2023, and increased numbers of lambs moving to England & Wales means that QMS misses out on the processor levy. However, changes in the supply chain led to some recovery in the final quarter, and slaughter is expected to rise strongly in 2024 as a result.

Pork Market

After a prolonged period of loss-making for pig producers through 2021 and 2022, market conditions were favourable in 2023. AHDB's cost of production model indicates a return to around breakeven in Q1 2023, followed by positive margins. Although pig prices have fallen seasonally since the summer of 2023, they have started 2024 3-5% higher year-on-year, with the GB SPP averaging 211.5p/kg in the week to February 3. In addition, production costs are expected to have remained below £2/kg dwt, helped by downwards pressure on feed prices.

In the second half of 2023, the legacy of breeding herd contraction continued to affect domestic production, with GB prime pig slaughter down 12% year-on-year. However, June Census results from England suggested that the sow herd had begun to stabilise, while more pigs left Scottish farms for slaughter in the second half

of the year than the first, in contrast to 2022, pointing to some slow recovery in supplies, which is likely to continue in 2024.

In the EU, where supply also remains fundamentally tight, seasonal price declines have been stronger than in GB; although some recovery is expected in the first half of February. There is a strong link between EU farmgate prices and UK import prices, so the steeper price declines on the continent have been placing downwards pressure on the domestic market. However, UK exports did show the early signs of recovery in autumn 2023.

Looking further afield, herd liquidation in China in late-2023 is expected to result in a tightening of supply in 2024, supporting China's import requirements, potentially providing some underlying support to UK and EU exports.

Labour Shortages

Processing businesses continue to find it very difficult to recruit and retain local workers, due to strong competition from other sectors and wages have had to increase significantly. High street butchers have had some success by focusing on training and increased wages.

With the end to free movement making challenging to recruit workers from the EU, processing businesses have had to introduce non-EU workers to maintain operations. This has been extremely expensive due

to UK immigration rules and the need to supply accommodation, often higher than £15,000 per worker.

Although labour supply remains tight in processing, vacancy levels are thought to have fallen to around 5%, down from as high as 15% in 2022. A concern for the sector is the potential for a further tightening in UK immigration rules, with a sharp rise in minimum salary requirements proposed. Immigration is a reserved power.

Cost of production

Commodity prices fell back sharply in 2023, supported by a weaker US dollar, filtering through to reduced input costs. However, farmers, processors and butchers are continuing to face higher levels of input costs than before the covid-19 pandemic. Indeed, Defra's Agricultural Price Index of agricultural inputs showed that energy was still up 63% on its 2020 average level in November 2023, while fertilisers were 62% above 2020 levels and feed was 36% higher.

Despite conflict in the Middle East, oil and gas prices have remained subdued since autumn 2023, with a surprising lack of risk premium ensuring that other commodity prices have been kept in check. Shipping delays between Asia and Europe are believed to have resulted in shortages of some imported commodities, but this has yet to filter into any major issues with input supply.

Rising cost of living

While the prolonged inflationary shock faced by the UK since 2021 is easing, with the CPI inflation rate ending 2023 at 4.0% compared to an October 2022 peak of 11.1%, it remained above the Bank of England's 2% target for a 29th consecutive month. By the end of 2023, the cost of living had risen by 21% in three years and is set to keep rising, just at a slower pace. Nevertheless, wage growth began to outpace inflation in the second half of 2023 and consumer confidence has rebounded significantly from its autumn 2022 low.

Consumer demand

The ONS' retail sales index indicates that consumer spending shifted towards groceries and away from non-food stores during the cost of living shock, supporting demand for red meat. In the second half of 2023, retail prices began to stabilise after rebalancing higher for two years and inflation slowed sharply. While this still meant year-on-year reductions in beef and pork sales volumes, the pace of decline slowed, and there was some growth in the Christmas trading period. Lamb retail prices had begun to stabilise in late-2022 and sales showed consistently strong performance in the second half of 2023 after a sluggish first half (except at Easter). However, strong farmgate price increases at the start of 2024 suggest that lamb retail price inflation may return this year.

In early 2024, grain and protein meal prices have fallen further as strong production from the Black Sea region is exported onto the world market at highly competitive prices, supported by improved logistics in Ukraine. In addition, wet weather in South America and Australia is expected to support harvests. The El Niño weather system has yet to result in significant disruption to global arable production, ensuring that prices have remained under pressure.

Workforce costs have however continued to rise sharply. While there was some softening in wage growth in autumn 2023, UK private sector earnings still rose by 6.4% year-on-year between September and November and were up 24% on 2019. Though interest rates are expected to have peaked, the cost of capital is set to remain much higher than in the period between the global financial crisis of 2007/8 and the covid-19 pandemic.



The rebalancing higher of beef, lamb and pork price levels since the pandemic may have been limiting volumes bought by food manufacturers for use in ready meals and products like burgers and canned meats, potentially leading to substitution of domestic products with cheaper imports. Similar pressures will have been faced by the foodservice sector. However, CPI data suggests that both sectors have managed to pass through rising input costs to end prices, suggesting robust demand.

Trade

While larger processors have adapted to the extra cost and challenges of complying with EU customs controls, small exporters have largely exited from trading across the EU border.

One potential challenge for exporters to the EU to manage in 2024/25 is a new EU regulation on deforestation-free products. Beef exporters will need geolocation data for the farms that cattle have been on, and the common feed ingredients soya and palm kernel are also covered.

However, there is uncertainty around the extent of due diligence and the EU is set to place a reduced burden on countries listed as low risk.

Exports to non-EU countries continue to face significant non-tariff barriers and, given the extra cost of trade, the opportunity needs to be of enough scale and value to make it worthwhile but, at the same time, not so large that it could put at risk supplying existing customers. QMS supported the first delivery of halal Scotch Lamb to Dubai in November 2023 and attendance at the Gulfood trade show in February 2024 is aimed at developing opportunities in the Gulf region, which is only around two-thirds self-sufficient in sheep meat.

Sustainability

On behalf of the Scottish Red Meat Resilience Group (SRMRG), a project is being undertaken to map out the Scottish red meat supply chain's science-based net zero route map. This will provide a comprehensive overview of scope 1, 2 and 3 emissions within the chain and give a clear steer on where investment is required to meet Scottish Government targets. Meanwhile, the net zero and nature restoration route map project will generate more evidence-based positive statements about the sustainability credentials of the Scottish red meat sector.

An internal working group has been formed to draft a corporate sustainability plan for QMS. Current practices in areas such as equipment purchases, energy use, recycling levels and business travel are being reviewed and staff guidance will be issued on where changes could be made without impacting on the efficiency and effectiveness of our services to stakeholders.

The introduction of GB customs checks on meat imports from the EU in spring 2024 could result in short-term supply constraints as EU exporters and GB importers adjust to the new processes, supporting demand for domestic products. However, import controls will reduce the risk of African Swine Fever (ASF) arriving in the UK through contaminated pork products. The detection of ASF in the UK would likely lead to the suspension of pork exports to several key export markets.

Although a Free Trade Agreement enabled imports of highly competitively priced beef and lamb from Australia to increase in the second half of 2023, generally tight markets ensured little impact on demand for domestic product. However, if market conditions were to soften, increased imports from Australia could have significant impact where provenance is less important than price. A longer-term risk is the cumulative impact of increased access to the UK market from post-Brexit FTAs.



5.0 QMS Strategy 2024–2028/29

QMS developed a new five-year strategy in 2023. This corporate business plan for 2024-2025 details each of the following:-



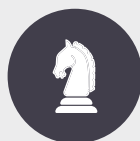
Our Vision



Our Mission



Our three strategic pillars and one foundational pillar



Our strategic objectives for each strategic aim



A one year implementation plan of the activities that we will do to achieve our strategy

Vision

Scotland: **The choice for premium red meat**

Mission

To lead the development of Scotlands red meat sector by driving demand from consumers who recognise our brands as a mark of integrity. We will foster profitable and innovative supply chains which supports jobs and communities across the country; all delivered by a creative, ambitious and trusted organisation that harnesses the talent of it people and supports individuals throughout the industry.

Provenance

To delivery and promote authentic, trusted brands, underpinned by quality assurance, which give Scottish red meat a competitive advantage.

Productivity & Profitability

Drive the development of key markets and foster a culture of innovation which provides practical tools and insight to drive profitability across the supply chain.

Planet & Place

To build Scotland a global reputation for sustainable red meat production, which enhances the environment and place from which it comes.

People

A QMS that is people-driven, supporting all those working across the red meat supply chain and building talent within the organisation to be ambitious and creative.

Strategic Indicators

1. Provenance

- 1.1 % of total beef, lamb and pork marketed under the Scotch or specially selected pork brand
- 1.2 Consumer brand awareness, brand perception and likelihood to purchase
- 1.3 An increased proportion of lamb reared in Scotland will be processed in Scotland
- 1.4 Increase in % of total livestock population covered by QA

2. Productivity and Profitability

- 2.1 A greater proportion of output going to export markets
- 2.2 Increase in partnership projects/aligned marketing projects with multiple retailers
- 2.3 Increase in total output sold to independent retail
- 2.4 Increased output from breeding herds & flock.
- 2.5 Increased engagement with on farm initiatives such as monitor farm/MTM
- 2.6 Increase in partnership projects with processors

3. Planet and Place

- 3.1 Every QA member engaged with an emissions reduction programme
- 3.2 Environmental progress is articulated and visible through our brands
- 3.3 Scottish public perception is favourable towards the Scottish red meat sector
- 3.4 Positive perception of QMS amongst decision makers

4. People

- 4.1 Positive perception of QMS amongst stakeholders
- 4.2 Positive perception of QMS amongst levy payers
- 4.3 QMS is viewed by employees as a great place to work
- 4.4 Positive perception of QMS amongst decision makers



6.0 Implementation Plans Per Departments

We have detailed below key highlights from our implementation plans for each of our departments:-

Business Development

Marketing

Communications
& External Affairs

Corporate Services

Business Development	What We Will Do	
Department Aim	Drive the development of key markets and foster a culture of innovation which provides practical tools and insight to drive to profitability across the supply chain.	
Department Objectives	<ul style="list-style-type: none"> • Increase productivity across the supply chain • Facilitate new export market opportunities for Scottish and Scotch/SSP proteins • Support the use of Scotch Beef, Scotch Lamb and Specially Selected Pork across all channels (butcher/wholesale/food service) • Support work with processors and multiple retailers to increase brand visibility • Support the supply chain to meet its net zero obligations • Increase the quality of Beef, Lamb and Pork produced in Scotland. 	
Key Deliverables	<ul style="list-style-type: none"> • Deliver a strong QMS stand and activity at SIAL 2024. • Deliver Four Scotch Beef Club launch events in Europe and begin recruitment of European members to Scotch Beef Club. • Deliver the Scotch Butchers Club development plan and continue to increase membership and engagement with Scotch Butchers Club. • Work with AHDB and others on a Halal development project • PGI/UKGI traceability project following EU Exit to ensure continued verification of the PGI's/UKGI's. • Develop new Brand guidelines for supply chain wholesale packaging. • Provide support to businesses to access and grow new markets both domestically and internationally. • Deliver engagement plan to marketing and agriculture teams across key suite of retailers. • Provide leadership in developing a national infrastructure to utilise the potential of bovine genomics. • Develop and deliver phase 2 of the roadmap to net zero & nature restoration including support for the Scottish phase of the ARC-Zero project • Deliver Pollution prevention control plans for 18 largest pig producers 	<ul style="list-style-type: none"> • Develop a KTIF project that looks to test a verification system for Scotch beef eating quality • Deliver Two building better beef & lamb supply chain events providing insight for producers through the whole supply chain. • Deliver a suite of Pig stockperson training to producers. • Deliver Pig performance benchmarking project and ensure key discussion points are communicated through the industry. • Manage a program to improve Scottish pig health via abattoir monitoring. • Research & review the potential impact on productivity of freedom farrowing in the pig sector. • Feral pig management: provide leadership to industry and support for policy makers to help reduce risk of African Swine. • Fever spread into UK/Scotland. • Monitor Farm Scotland Project • Deliver the Monitor Farm Scotland Programme as per the KTIF project plan which includes: • Deliver 12-15 large open meetings per year • Deliver in-depth data collection from monitor farms focussed on developing economic and social performance • Regular and dynamic communications engaging the farming community. • Develop engaging multi-media content with high-profile contributors

Marketing	What We Will Do	
Department Aim	To deliver and promote authentic, trusted brands, underpinned by quality assurance, which give Scottish red meat a competitive advantage.	
Department Objectives	<ul style="list-style-type: none"> • To win the hearts and minds of current and lapsed (UK) meat eaters and where they have a choice, ensure they choose Scotch red meat because they understand & appreciate the benefits of it. • To be visible to and emotionally connect with UK Meat Eaters and become a brand that is versatile and relevant to those enjoying a balanced healthy lifestyle. • To protect retail listings and increase the space on shelf and demand for red meat sold as Scotch. • To encourage frequency of consumption of Scotch Beef, Scotch Lamb & Specially Selected Pork through product versatility, availability and recipe inspiration. • To increase consumer brand awareness, perception & propensity to purchase. • To aspire to reach a minimum of 70% of the Scottish adult population with each key brand campaign. • To build a meaningful understanding of the Scotch difference/what's behind the label. • To build a brand plan rooted in market and consumer insights that drive our activities and the increase the chances of success. • Continually review and update our standards to maintain their integrity without adding to the audit burden on levy payers, ensuring the standards are fit for the future. • Regularly and authentically engage with members to inform and educate them on our standards and the benefits of being quality assured. • Foster and develop a strong working relationship and collaborative partnership approach with FIA and assessors. • Provide support, signposting and general advice to ensure scheme compliance, governance, best practice and high levels of scheme member satisfaction. 	
Key Deliverables	<ul style="list-style-type: none"> • Work with newly appointed agencies to deliver a new 3 year umbrella brand campaign and media plan that are both cost effective and impactful • Develop a new set of brand guidelines and tone of voice to reflect the new creative campaign and how it can be consistently applied across all activities... • Secure year-round presence for the 3 brands by way of positive consumer news coverage and stories across a wide range of occasions and angles, including regular tactical 'newsjacking' opportunities • Demonstrate positive shifts in all key brand health tracking measures (awareness, perception, propensity to purchase., relevant, healthy) • Deliver marketing and PR activities that better demonstrate the Scotch difference and the principles behind the label to consumers in a compelling and relevant way • An upweighted influencer plan focusing on Instagram and TikTok • Weave a health narrative into more of our activities, specifically busting red meat myths with factual evidence to educate people about the benefits of eating red meat as part of a healthy, balanced and sustainable diet • Upgraded and SEO optimised websites • Drive versatility and new eating occasions with new recipe content remaining cognisant of the cost-of-living crisis • A proactive and reactive plan of activity to protect listings of the Scotch and SSP brand sold through UK retail and independent butchers Create a marketing plan to support and better utilise the Butchers Club and Beef Club • Provide market support and assets to drive leads and distribution both in the UK (retailers and processors) and Internationally 	<ul style="list-style-type: none"> • Work closely with AHDB, HCC and LMC to ensure that our narratives are aligned on key or contentious areas of focus • Become a centre of insight excellence for understanding red meat consumer trends and behaviours, generating market insight and detailed market reports and providing customer/ stakeholder support with a specific focus on Scotland • Provide contract management direction and support to FIA to optimise the operational delivery of the QA scheme and ensure all KPI's and contractual requirements and service level agreements are met. • Conduct Formal and Interim reviews of assurance scheme standards to include (where necessary) benchmarking, stakeholder consultation, reviewing feedback, preparing proposed changes to documents and issuing new standards in a user-friendly format • Evolve the standards to incorporate sustainability credentials as part of a brand evolution initiative. • Roll out the new traceability checkers (including training) within the markets and abattoirs. • Exploration of a business case for implementing the Assurewell framework in Scotland. • Ensure the UKGI audit process is fully developed, rolled out and adhered to. • Provide a high standard of member support and general advice on a daily basis to encourage best practice and maintain the schemes integrity . • Cooperate with Red Tractor, LMCNI and FAWL to share information on QA schemes developments and wider industry trends and ensure a mutually cooperative working relationship. • Ensure our membership rules are reviewed regularly and effective running of our governance committee'.

Communications & External Affairs	What We Will Do
Department Aim	To build Scotland a global reputation for Sustainable red meat production, which enhances the environment and place from which it comes.
Department Objectives	<ul style="list-style-type: none"> Recruit and build new communications team, build positive team culture, and embed key press office processes across the wider organisation. Develop new communications strategy covering: <ul style="list-style-type: none"> 'Transactional' communications to QA members and levypayers Corporate reputation communications on the work QMS undertakes on behalf of the industry Proactive reputation building campaign on the contribution red meat makes to society, economy, environment, and health. Enhance the perception of red meat to young people in both the education and community sports settings. Develop QMS as an evidence centre for red meat, utilised regularly by key decision makers from government, political parties and the supply chain.
Key Deliverables	<ul style="list-style-type: none"> Review 'Making The Most of The Media' publication and deliver 2x workshops to members of the supply chain on speaking up about red meat. Develop a new programme of content highlighting positive facts around red meat production in Scotland. Develop communications campaign on the Net Zero Roadmap Develop 'Talk a Good Game' project aimed at young people partaking in community sports educating around the role red meat plays in a healthy balanced diet. Deliver Meat Voucher Scheme to secondary schools across Scotland. Deliver Scotch Lamb for St Andrews Day Develop collaborative reactive process with HCC and AHDB on key reputational issues. Develop a bank of facts, statements and expert commentators who can be utilised in reactive media situations. Continue to develop Farming Foodsteps to ensure it remains up to date and relevant. Build relationships with teaching profession to market Farming Foodsteps •Develop relationship with RHET and deliver impactful sessions at Food and Farming Days Review public affairs strategy with the new structure and strategy in mind. Develop a new twice yearly QMS newsletter to deliver to parliamentarians and councillors. Facilitate FAST PA subgroup and agreed actions. Ensure a regular calendar of MSP, MP and Councillor meetings and visits to raise the profile of the red meat supply chain with elected politicians. General Election: ensure needs of red meat supply chain in Scotland are communicated to respective political parties. Build proactive relationships with lobby organisations (NFUS/SAMW/SF&D, FDF) to ensure aligned response to key industry issues. Ensure visibility of QMS evidence to consultations, calls for evidence and briefing notes on key issues. Ensure strong QMS representation at stakeholder events and meetings. Delivery of the Red Meat Industry Profile Cattle Productivity Benchmarking Project, and scope lamb and pork benchmarking support Supply Chain Information Service: Deliver quarterly zoom 'business briefings' on market updates aimed at procurement staff, auctioneers, feed sales reps, assessors and vets. Review and deliver new style of monthly market report and work with the comms team to broaden readership. Market Intelligence Service: Provide technical briefings as requested by members of the QMS team, or members of businesses within our supply chain as required to respond to key issues. Ensure there is a provision of market prices and information on the QMS website Support corporate governance through levy analysis and reconciliation.

➔ Corporate Business Plan

Corporate Services	What We Will Do
Department Aim	A QMS that is people driven, supporting all those working across the red meat supply chain and building talent within the organisation to be ambitious and creative.
Department Objectives	<ul style="list-style-type: none">• Compliance with all levels of governance.• Corporate Budget Management including current and future budgets.• Ensure a robust HR function to support all staff.• Provide a professional administration service to all staff, Board and key stakeholders.• Implementation of Customer Relationship Management and project reporting system.• Develop and implement a people strategy.
Key Deliverables	<p>Finance and Administration</p> <ul style="list-style-type: none">• Professional support to all staff, Board and stakeholders• Monthly finance reports• Regular budget reviews• Administer our levy collection• Quality assurance scheme finances <p>Technology and Software</p> <ul style="list-style-type: none">• Continuation of our hardware succession plan• Continual development of our cloud software and processes• Continual review to streamline our internal processes• Provide manuals for all new software <p>Governance</p> <ul style="list-style-type: none">• Complete programme of Internal Audits• Unqualified financial year end audit• Compliance with GDPR regulations• Compliance with procurement regulations• Review of internal policies and procedures <p>Human Resources</p> <ul style="list-style-type: none">• Continual development of the QMS training plan• Continual development of the QMS interactive induction document• Enhance employee interactions, and collaborative working



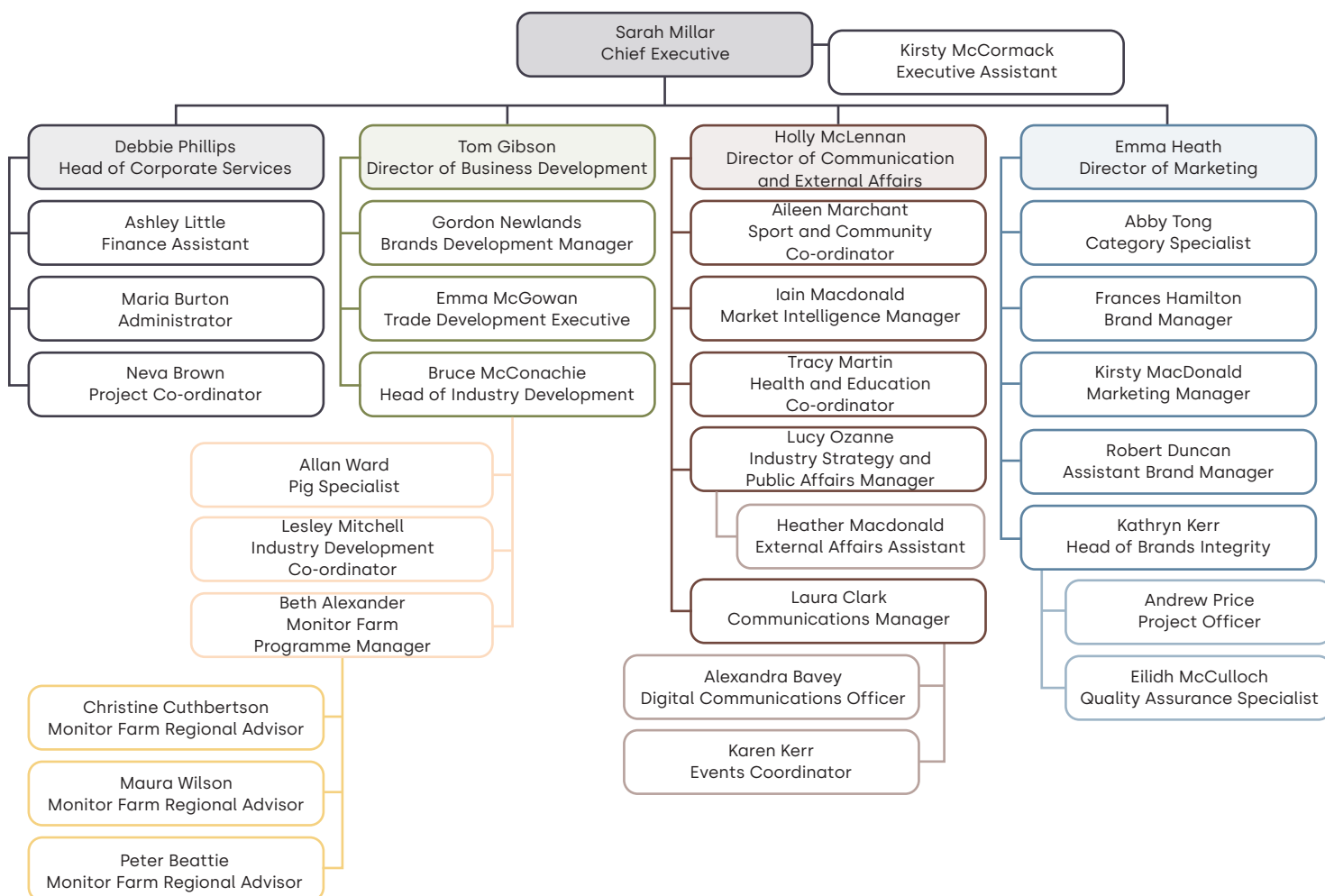
7.0 Key Deliverables Per Department

This provides us with a focus to ensure that all our activities meet our strategic aims and objectives. This breaks down by department as follows: -

Department	Budget 24/ 25 (£)	% OF Total 24/ 25
Corporate Services	£862,887	10.9%
Business Development	£1,896,978	23.8%
Marketing	£4,110,304	51.6%
Communications & External Affairs	£1,093,802	13.7%
Total	£7,963,971	100%

8.0 Staff Resources

In July of 2023, QMS undertook a staff restructure to align with its new strategy. The purpose of this was to ensure the organisation had a team that could deliver on the ambitions outlined, and to ensure that QMS future-proofed its staffing needs. The new organisational chart is detailed below, with some new positions being filled in Q1 & Q2 2024/25.



9.0 Key Delivery Partners

Quality Meat Scotland is part of the private and public-sector collaboration of Scotland Food & Drink and represented on their Partnership Board. We also work closely with our key stakeholders and our long-term aim is to create shared strategic objectives across our footprint in the Scottish red meat sector which includes: - farmers, feed suppliers, auction markets, hauliers, primary processors, secondary processors, retailers, butchers, food service providers and chefs.

Quality Meat Scotland has also been an active participant in the development of the Food and Agriculture Stakeholder Taskforce (FAST) group, which became formally constituted at the start of 2024. This allows QMS to have easily recognised and effective ways of engaging with multiple stakeholders around key activities and issues.

10.0 Scottish Government National Performance Framework

Because of its activities on behalf of the industry, QMS contributes to the Scottish Government's primary purpose of "increasing sustainable economic growth" and to the five strategic objectives and relevant national targets. Appendix C details the Scottish

Government National Performance Framework, its strategic objectives, national outcomes and the progress that QMS has made to this against these outcomes.



11.0 Relationships with other Stakeholder Strategies

This strategy is aligned with the Scottish Government's economic strategy of increasing sustainable economic growth, Scotland's 'National Food and Drink Policy; "Becoming a Good Food Nation", and Scotland Food & Drink's strategy "Ambition 2030."

Since 2007, the Scottish Government's central purpose has been to create a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth. This remains the Government's ambition to which all their efforts and actions are directed and is at the core of Scottish Government's Economic Strategy. A strong, vibrant and diverse economy is essential to Scotland's national prosperity as well as creating the wealth to support high- quality public services. Ensuring that growth is shared and sustainable is the key to unlocking all of Scotland's potential and strengthening its greatest asset - the people of Scotland.

Scotland's National Food and Drink Policy: Becoming a Good Food Nation articulates a new aspiration: that Scotland should become a Good Food Nation, a Land of Food and Drink not only in what we produce but also in what we buy, serve and eat. The Scottish Government wants food to be a key part of what makes people proud of their country – food which is both tasty and nutritious, fresh and environmentally sustainable. Actions towards achieving this aim include the Good Food Nation Act, which has six key outcomes. They are:

- Everyone in Scotland eats well with reliable access to safe, nutritious, affordable, sustainable and age and culturally appropriate food.
- Scotland's food system is sustainable and contributes to a flourishing natural environment. It supports our net zero ambitions and plays an important role in maintaining and improving animal welfare and in restoring and regenerating biodiversity.
- Scotland's food system encourages a physically and mentally healthy population, leading to a reduction in diet-related conditions.
- Our food and drink sector is prosperous, diverse, innovative and vital to national and local economic and social wellbeing. It is key to making Scotland food secure and food resilient and creates and sustains jobs and businesses underpinned by fair work standards.

- Scotland has a thriving food culture with a population which is interested in and educated about good and sustainable food.
- Scotland has a global reputation for high-quality food that we want to continue to grow. Decisions we make in Scotland contribute positively to local and global food systems' transformation. We share and learn from best practice internationally.

Sustaining Scotland, Supplying the World, sets out Scotland Food and Drink's strategy which is designed to help the sector recover from the shocks of the pandemic and Brexit. The ambitions set out in the strategy include:

- Seizing an estimated £4 billion market for growth to become a £20 billion industry by 2028.
- Increase profitability across the sector.
- Grow faster than any other major industry in Scotland.
- Grow faster than similar-sized competitors.
- Remain the largest food and drink exporter in the UK.
- Attract and upskill a new generation of highly skilled professionals.
- Be one of the world's most environmentally sustainable food-producing nations.
- Secure record investment across the food and drink industry.

The 2030 Beef Sector Strategy was launched in June 2022. It was developed by a steering group comprising stakeholders from across the supply chain, with invaluable industry input through consultation and collaboration. The strategy emphasises that sector growth must be responsible on economic, environmental, and social fronts. Our shared vision is that, by 2030, the Scottish beef supply chain will comprise profitable, sustainable and resilient businesses built on a skilled workforce. It will continue to deliver high-value, quality beef and beef products to domestic and international customers, produced to world-leading animal health and welfare standards in a way that has reduced the sector's carbon emissions by 75 per cent from 1990 levels.

12.0 QMS and Programme for Government Themes

The First Minister, Humza Yousaf, unveiled his first Programme for Government in September 2023, promising to deliver on his three national missions of equality, opportunity and community. His legislative programme contained 14 bills, one of which was the Agriculture and Rural Communities Bill, which is designed to put in place a new payment support system for Scottish agriculture.

The Scottish Government has promised to better incentivise sustainable and regenerative practice, on-farm nature restoration while supporting farmers and the supply chain in high-quality food production.

QMS is highly engaged with its range of stakeholders and our knowledge transfer/exchange activities will continue to increase during the 2025-2026 financial year. Marketing campaigns regularly utilise social media and have created opportunities for increasing numbers of consumers to engage more directly with the Scotch Beef, Scotch Lamb and Specially Selected Pork brands.

13.0 Review of Past Performance

Each year, QMS lays before Parliament its Annual Report and Accounts giving a comprehensive review of its activities for the past year. In the interests of efficiency this review is not included in this Corporate and Business Plan.



14.0 Statement on Information and Communications Technology

Quality Meat Scotland (QMS) is a knowledge-based organisation and is focussed on interpreting information and developing knowledge for levy payers and other stakeholders. An effective in-house Information and Communications Technology (ICT) strategy is integral to the successful working of QMS.

QMS will operate an in-house ICT system which supplies sufficient resources to help provide the industry with accurate and timely information. All of QMS's in-house systems and networks will be effectively protected from accidental or malicious disruption.

QMS will provide employees with opportunities to acquire the skills to collate, store and deliver information in accordance with the organisation's needs and national regulations. To carry out these tasks, suitable hardware and software will be provided to optimise communication links with target audiences.

To preserve the integrity of its ICT systems, QMS will ensure that suitable support is available to users to minimise the effects of a system shutdown. QMS participates in the Assurance Framework for Scottish Government IT and Digital Projects.

15.0 Statement on Public Bodies Climate Change Duties

In recognition of its responsibilities under the Climate Change (Scotland) Act 2009, QMS will take appropriate steps to mitigate, adapt and act in a sustainable manner. QMS will participate in Scottish public-sector sustainability reporting. In its work with stakeholders to improve business sustainability, QMS will continue to promote awareness of mitigation and adaptation strategies and the adoption of best practice to secure carbon reducing production efficiencies across the supply chain.

In addition, within the 2024/25 financial year QMS will develop its own organisational Climate Change Plan to detail as an organisation how we will contribute to reducing emissions in line with Scottish Government legislation.

16.0 Statement on Equality

QMS is proud to be an equal opportunity employer. Appointments to QMS and internal promotions will be made solely on the individual employee's ability, skill, competence and potential.

Our policy is not to discriminate on any grounds including race, colour, nationality or ethnic or national origin, religion or beliefs, sex, gender reassignment, sexual orientation, pregnancy and maternity, marriage or civil partnership, age, responsibility for dependants, HIV status or disability.

17.0 Levy Rates for 2024-2025

Species	Producer levy/head	Processor levy/head
Cattle	£4.49	£1.39
Calves (up to 68kg)	£0.07	£0.08
Sheep	£0.64	£0.21
Pigs	£1.09	£0.26

18.0 Income & Expenditure Budget 2024-2025

Income	£
Levy	5,626,482
Assurance Schemes	1,595,688
Grants	450,000
Other income	17,000
Bank Interest	6,000
	7,695,170
Expenditure	£
Marketing	4,110,304
Business Development	1,896,978
Communications and External Affairs	1,093,802
Corporate Services	862,887
	7,963,971
Net surplus / (Deficit)	(268,801)

19.0 Balance Sheet Budget 2024-2025

Non-current assets	
Furniture, fittings and equipment	34,141
Intangible assets	13,200
Right-of-use assets	28,892
	76,233
Current assets	
Trade receivables and other current assets	1,235,513
Deposits and advances	405,644
Cash and cash equivalents	889,422
Total current assets	2,530,579
Total assets	2,606,812
Current liabilities	
Trade payables and other current liabilities	695,448
Lease liabilities	16,756
Total current liabilities	712,204
Non current liabilities	
Lease liabilities	16,305
Deferred income	172,229
Total non current liabilities	188,534
Assets less liabilities	1,706,074
Reserves	
General reserve	1,706,074
	0

20.0 Appendix A - Board and Corporate Governance

The QMS Board oversees the efficient and effective use of staff and other resources by QMS in accordance with the principles of best value. A robust system of financial monitoring and performance review is in place. Apart from regular meetings of the Board, this includes an independent Audit & Risk Management Committee consisting of three Board members and the appointment of independent internal auditors. As a public body, the external audit function comes under the scrutiny of Audit Scotland. A risk register is regularly reviewed by the Board and policies are in place governing the use of reserves and the application of public procurement rules. QMS has a Management Statement and Financial Memorandum which sets out the relationship between QMS and the Scottish Government.

All Board members are non-executive and appointed by Scottish Ministers for a term not exceeding 4 years. Board Members may be reappointed a second term of up to 4 years but may not exceed two terms. The appointments are made in line with the Code of Practice issued by the Commissioner for Ethical Standards in Public Life in Scotland.

The Board has corporate responsibility for ensuring that QMS achieves the Scottish Ministers' overall aim of using the statutory levy for the benefit of Scottish levy payers. QMS recognises the importance of good governance standards in the public sector and bases its approach on six principles as follows:

- Focussing on the organisation's purpose and on outcomes for levy payers specifically and others generally.
- Performing effectively in clearly defined functions and roles.
- Providing effective corporate governance for the whole organisation and ensuring principles of value for money are embedded into procedures.
- Taking informed transparent decisions and managing risk.
- Developing the capacity and capability of the governing body to be effective.
- Engaging with levy payers and other stakeholders to ensure good accountability.

QMS Committees

Underpinning the board is a range of committees, which are used to both inform and design areas of QMS's work with the businesses and service users of the outputs. During 24/25 a restructure of these committees will take place, with the work to do this being completed in May 2024 before formal changes being implemented from July 2024.

QMS has a number of committees, and a summary is given below, followed by a list of the members of each committee.

QMS Board		QMS Audit & Risk Management Committee	QMS Scottish Red Meat Industry Resilience Group
Ian Bentley Peter Brown Emma Buckby Jilly Duncan Grant Ann Irvine Adrian Ivory Scott Jarron Niall Jeffrey Andy McGowan Kate Rowell Carrie Ruxton Gordon Wallace		Ann Irvine Peter Brown Gordon Wallace Niall Jeffrey	QMS Board - Chair AIC Scotland Institute of Auctioneers and Appraisers in Scotland (IAAS) National Farmers Union of Scotland (NFUS) National Sheep Association Scotland (NSA Scotland) Pig Industry Leadership Group Scottish Association of Meat Wholesalers (SAMW) Scottish Association of Young Farmers Clubs (SAYFC) Scottish Beef Association (SBA) Scottish Crofting Federation Scottish Federation of Meat Traders (SFMTA)
QMS Beef & Lamb Marketing Advisory Group		QMS Remuneration Committee	
		Ian Bentley Peter Brown Adrian Ivory Kate Rowell	
QMS Beef & Lamb Marketing Advisory Group		QMS Pork Marketing Advisory Group	QMS Butchers Marketing Advisory Group
Sara Barbour Ian Bentley John Cameron Frank Clark Dan Gilmour Adrian Ivory Ian MacDougall John McMaster Caroline Millar George Milne	George Purves Bryan Robb Gavin Ross Carrie Ruxton Roisin Turner Michelle White Lesley Wylie Victoria Antoniadou Chris Scott	Scott Jarron Vickie Lane Marion MacCormick Andy McGowan Barry Robertson Fraser Shaw Charlie Street Steven Reaper Tavis McCabe	Nigel Ovens Ariane Bennet Laura Black Gavin Colquhoun Tommy Cruickshank Louise Forsyth Scott Jarron Chris Leg Derek Mackay David Mckinnon Shelly Robertson John Saunderson Steven Strachan Gordon Wallace David Webster
QMS Cattle & Sheep Industry Advisory Group		QMS Pig Forum	QMS Haulage Industry Advisory Group
Michael Denholm Jilly Duncan Grant Hugh Fraser Owen Gray Danny Hair Gavin Hill Lisa Hislop Niall Jeffrey Alistair Kingan Bill MacKinnon Nigel Miller Clive Phillips Kate Rowell Steven Sandison Alex Stephen Charley Walker Sion Williams James Young		Sandy Howie Roderic Bruce Emma Buckby Neil Hamilton Alistair Lane Andy McGowan Penny Middleton Donna Nixon Jamie Robertson Fraser Shaw Jill Thomson Robin Traquair Joan Walker Gordon Wallace Grace Webster Jamie Wylie	Derek Armstrong Jim Baird Joe Beedie Ronald Davidson Roy Gauld Iain MacEachen Andy McGowan Gordon Mcken Alan Murrie Alan Stewart Sandy Taylor Neil Walker Richard White

QMS Cattle & Sheep Assurance Standards Setting Body	QMS Pig Assurance Standards Setting Body	QMS Haulage Assurance Standards Setting Body
Robert Anderson Johnnie Balfour John Bell Emma Buckby Gary Christie Suzie England Hugh Fraser Tom Gatherer Lisa Hislop Ann Irvine Niall Jeffrey Finlay MacIntyre Elena McWatt Jordie Orr Grace Reid Yvonne White Simon Williams Neil Wilson	Peter Brown Roderic Bruce Bridge Frowd Tom Gatherer Iain Lyle Adam Marshall Jr Andy McGowan Penny Middleton Carrie Ruxton Danny Skinner Kathleen Smurthwaite Grace Webster Jamie Wyllie	Derek Armstrong Martin Bell Ronald Davidson Tom Gatherer Adrian Ivory Iain MacEachen Andy McGowan Gordon McKen John McMaster Oliver Shearman Sandy Taylor Richard White
QMS Processor Assurance Standards Setting Body	QMS Auction Market Assurance Standards Setting Body	QMS Feeds Assurance Standards Setting Body
Ian Bentley Angela Carris Bridge Frowd Tom Gatherer Lauraine Manson John McMaster Atilla Morvat Andrew Nye Alex Seguino Craig Simpson	Emma Buckby Jilly Duncan Grant Tom Gatherer Jennifer Cursiter Hugh Fraser Luke Holmes Alan Hutcheon Mick Park Brian Ross John Smith John Thomson Neil Wilson Donald Young	Adrian Ivory Simon Williams
QMS Brands Integrity Advisory Group	Standards Coordinating Standards Setting Body	Membership Rules Appeals Panel
Ian Bentley Pete Brown Ann Irvine	Adrian Ivory Andy McGowan Gordon Wallace Ian Bentley Kate Rowell Niall Jeffrey Pete Brown	Amy Jackson Dennis Overton Freda Scott-Park

21.0 Appendix B – Strategic Management Team

QMS Strategic Management Team:

Sarah Millar	Chief Executive
Kirsty McCormack	Executive Assistant
Debbie Phillips	Head of Corporate Services
Tom Gibson	Director of Business Development
Emma Heath	Director of Marketing
Holly McLennan	Director of Communications & External Affairs (from June 2024)

22.0 Appendix C – QMS and the Scottish Government's National Performance Framework

 [Link to full framework doc](#)

1 General

As a result of its activities on behalf of the industry, QMS contributes to the Scottish Government's primary purpose of "increasing sustainable economic growth" and to the five strategic objectives and relevant national targets. For reference, the purposes of QMS as set out in the Quality Meat Scotland Order 2008 are:

- To increase efficiency or productivity in the red meat sector
- Improve marketing in the red meat sector
- Improve or develop services that the red meat sector provides or could provide to the community
- Improve the ways in which the red meat sector contributes to sustainable development

2 National Performance Framework Strategic Objectives

QMS's work on behalf of the industry contributes to all five of the Government's Strategic Objectives. QMS's main contribution is to the wealthier, smarter and greener objectives. Some work is also undertaken which contributes to the healthier objective and the safer and stronger objective.

Wealthier and Fairer – the overall objective of QMS is to support the development of a sustainable, professional, resilient and profitable Scottish red meat industry which makes an important contribution to Scotland Food & Drink's target of £30bn by 2030.

Smarter – QMS develops and manages the delivery of a range of industry programmes which are specifically designed to transfer knowledge and increase the uptake of new ideas which help to improve efficiency and drive innovation in red meat production.

Corporate Business Plan

Greener – QMS continues to engage with government and the industry to enhance the environmental sustainability of red meat production.

Healthier – QMS contributes to the Scottish Government's strategic objective of a healthier Scotland through promoting the benefits of eating red meat as part of a healthy, balanced diet. For example, work already undertaken and future work will contribute to the Obesity Routemap.

Safer and Stronger – through its work in shaping a sustainable, professional and resilient development of a profitable Scottish red meat industry, QMS is helping to ensure long-term food security for Scotland.

3 National Performance Framework National Outcomes

There are 16 National Outcomes as follows:

1. We live in a Scotland that is the most attractive place for doing business in Europe.
2. We realise our full economic potential with more and better employment opportunities for our people.
3. We are better educated, more skilled and more successful, renowned for our research and innovation.
4. Our young people are successful learners, confident individuals, effective contributors and responsible citizens.
5. Our children have the best start in life and are ready to succeed.
6. We live longer, healthier lives.
7. We have tackled the significant inequalities in Scottish society.
8. We have improved the life chances for children, young people and families at risk.
9. We live our lives safe from crime, disorder and danger.
10. We live in well-designed, sustainable places where we are able to access the amenities and services we need.
11. We have strong, resilient and supportive communities where people take responsibility for their own actions and how they affect others.
12. We value and enjoy our built and natural environment and protect it and enhance it for future generations.
13. We take pride in strong, fair and inclusive national identity.
14. We reduce the local and global environmental impact of our consumption and production.
15. Our people are able to maintain their independence as they get older and are able to access appropriate support when they need it.
16. Our public services are high quality, continually improving, efficient and responsive to local peoples' needs.

4 QMS's Contribution to the National Outcomes

QMS, through its stakeholders, contributes to six of the 16 National Outcomes.

We realise our full economic potential with more and better employment opportunities for our people (National Outcome 2). Farming and primary processing of red meat contribute approximately £2.4bn of output and £700m of value added to Scotland's economy annually. QMS brands of Scotch Beef PGI, Scotch Lamb PGI and Specially Selected Pork add value to the industry and enhance Scotland's reputation as a land of food and drink. The red meat industry is a significant contributor to Scotland's food exports. The rearing of beef cattle, sheep and pigs; the primary red meat processing sector; and their principal suppliers (including auction markets and vets) provide employment for approximately 30,400 people in Scotland. In addition, primary red meat production and processing supports approximately 2,300 jobs in other sectors of the Scottish economy, such as construction and financial services.

We are better educated, more skilled and more successful, renowned for our research and innovation (National Outcome 3). By developing and managing the delivery of a range of industry programmes specifically designed to transfer knowledge and increase the uptake of new ideas to help improve efficiency and drive innovation, for example, the Monitor Farms programme.

We live longer, healthier lives (National Outcome 6). Through our work with consumers of all ages on the

importance of red meat in a healthy diet and lifestyle. QMS delivers a range of health and education activities from school visits to a school meat vouchers scheme and a healthy living bursary. A range of support materials is also produced and we work closely with National Diet Resources UK. QMS also works with partners such as the Royal Highland Education Trust on events and farm visits.

We value and enjoy our built and natural environment and protect it and enhance it for future generations (National Outcome 12). Our farmer stakeholders understand the land and act as custodians of the countryside significantly enhancing its biodiversity and encouraging visits to the outdoors.

We reduce the local and global environmental impact of our consumption and production (National Outcome 14). Through developing our understanding of the effects of climate change and reducing our ecological footprint. For example, waste reduction measures such as encouraging sourcing and purchasing of Scottish red meat products rather than imported products. Also, by providing support to the industry to improve carcase yield through increased sales of fifth quarter products. Finally, knowledge transfer activities which result in better breeding policies and healthier livestock increase production efficiency and, therefore, reduce the environmental impact of production.

Our public services are high quality, continually improving, efficient and responsive to local peoples' needs (National Outcome 16). For example, QMS engages in several activities designed to deliver continuous improvement in the red meat production chain. QMS also produces annual benchmarking data on cattle and sheep enterprise profitability in Scotland which is widely used by farmers and their advisors as a continuous improvement tool for increased efficiency.

4.5 Measuring Progress in the National Performance Framework

The organisation currently has an overall strategy and seven specific strategies. Objectives for the implementation of these strategies are set and these objectives are further supported by a list of activities and performance measures which are specified in a detailed management plan.

The Board considers a written progress report in advance of each Board meeting. The Scottish Government attends Board meetings and in this way is continually kept up to date with the performance of the organisation.



Quality Meat Scotland

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