



# Beef Sector Strategy 2030





**B**eef 2030 is an overarching, dynamic strategy for the Scottish beef sector, developed through industry consultation and collaboration. It aims to build on current strengths, address key weaknesses and threats, and identify innovative opportunities to future-proof the industry, such as attracting new entrants and young people to the industry whilst embracing innovative technology and developing new and emerging markets.

The strategy is based on four pillars: environmental sustainability; profitability within the supply chain; people and skills; and animal health and welfare. Within each strategic pillar, key focus areas have been identified and recommendations made to enhance, develop and support the sector.

When Beef 2020, the predecessor to this report, was written, no one could have predicted events such as the UK's departure from the EU, the Covid 19 pandemic and the invasion of Ukraine, all of which have impacted on the industry's operating environment.

There is no doubt that the next eight years will also present significant challenges and adversity. The Scottish beef sector has a major job to do, with key challenges including achieving a 75% reduction in emissions and setting the industry up beyond that to reach net zero by 2045; addressing low profitability across the supply chain; and maintaining Scotland's productive capacity as a food producing nation.

Beef production involves more than 10,000 farm and croft holdings in Scotland and contributes some £850 million to Scotland's annual farm output – around 25% of the total. These farms and crofts supply about 450,000 cattle per year to 20 abattoirs in Scotland, producing more than 165,000 tonnes of beef annually.

While beef cattle farming is at the centre of a successful Scottish beef value chain, the wider industry is comprised of a diverse range of components, ranging from farmers and crofters, vets, hauliers, auctioneers and feed and supply sector companies, through to processors, butchers, logistics and retail outlets. The future success of the industry is reliant on each and every element of this supply chain working together for the benefit for the industry as a whole.

# Our Vision

*By 2030 the Scottish beef supply chain will comprise profitable, sustainable and resilient businesses built on a skilled workforce delivering 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% from 1990 levels.*

**Reducing**  
our carbon emissions by  
**75%**  
**increasing**  
the focus to benefit the  
natural environment

**Developing**  
and  
**enabling**  
our people through:  
 **upskilling**  
 **training**  
 **wellbeing**

**Increasing**  
the economic  
value of  
**beef**  
supply chains

Ranking  
**Scotland**  
as a world  
**leader**  
in animal  
**health & welfare**

## Growth Ambitions

As we look forward to 2030, growth of the beef value chain in Scotland has to be our main ambition. However, with the added focus on the climate and nature emergencies, that growth has to be responsible and must also maintain a downward pressure on emissions throughout the Scottish beef supply chain. What growth looks like in 2030, is growth that spans economic, environmental and social responsibility equally.

### **Our priorities - Our key growth objectives for 2030**

#### **Social**

- People value the Scottish red meat industry and want to be engaged as consumers, or as part of the workforce.
- Communities, customers and consumers recognise the value the Scottish red meat industry brings to Scottish communities, landscapes and rural economies.
- We will work to maintain suckler cow numbers at 2021 levels – 413,000 as per the June Agricultural Census.

#### **Economic**

- We will increase the value of Scotch Beef PGI by increasing domestic market penetration and develop credentials as the leading sustainable red meat protein brand available in Great Britain.
- We will develop increased economic resilience by growing market share in key export markets and working to increase market access globally.
- We will look for ways to develop additional added-value manufacturing activity in Scotland, exploiting opportunities to derive additional value from the whole carcass.

#### **Environmental**

- We will demonstrate global leadership on red meat protein production as part of the Scottish Government's world leading Climate Change Act, reducing emissions by 75% by 2030.
- We represent 'Meat With Integrity', showing that we uphold the highest standards in traceability, assurance and animal welfare, and use that to generate additional value for the Scotch Beef PGI brand.

# Key focus areas

## **1. How we will... reduce our carbon emissions by 75% and manage our land to benefit nature**

- 1.1. Develop a Red Meat Industry Net Zero Pathway
- 1.2. Further strengthen the Scotch brand to enable the marketplace to reward actions taken through the supply chain to reduce emissions
- 1.3. Enable businesses, from field to fork throughout the supply chain, to access support that increases adoption of solutions
- 1.4. Increase communication with consumers and the general public about the benefits and merits of beef production and consumption in Scotland

## **2. How we will... increase the economic value of beef and beef products through the supply chains**

- 2.1. Improve product quality and consistency
- 2.2. Identify and accelerate post-farm gate investment
- 2.3. Develop our global and domestic marketing
- 2.4. Improve market access to a range of high-value export markets
- 2.5. Increase the level of collaboration both within and outside the Scottish beef supply chain
- 2.6. Increase the level of planned generational renewal

## **3. How we will... develop and enable our people through upskilling, training, and a focus on wellbeing**

- 3.1. Facilitate better career path development
- 3.2. Increase the level of work-based and vocational training
- 3.3. Increase the range and availability of knowledge transfer and continuing professional development (CPD)
- 3.4. Ensure our workforce is enabled to better its mental wellbeing

## **4. How we will... enable global leadership in animal health and welfare**

- 4.1. Reduce productivity loss in the Scottish beef herd
- 4.2. Ensure the risk of antimicrobial and anthelmintic resistance is minimised
- 4.3. Increase the level and value placed on health planning in the beef herd
- 4.4. Increase the level of planned genetic selection for productivity and market outcomes by Scottish farmers
- 4.5. Implement global best practice in managing animal welfare



Despite these challenges, the Scottish beef industry faces an exciting future. We have one of the most envied natural resource bases in the world, ideally suited to the production of beef. Scotland is home to world-leading research and development institutes and universities which are at the forefront of innovating technical solutions to our industry challenges. We are supported by a wide array of passionate

and skilled industry personnel, from our farmers, hauliers, feed merchants, auctioneers through to our manufacturing workers, vets and butchers. Every single person working in our Scottish beef industry is a vital cog in a machine that does not stop, operating seven days a week, 52 weeks a year. Harnessing those advantages and skills will allow us to deliver the strategy outlined in Beef 2030.