

Quality Meat Scotland

# Impact Summary

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April-September 2025





"This is just a snapshot of the work that goes on to support our

£3.5 BILLION

red meat sector employing more than

39,000 PEOPLE

in Scotland, and we will continue our ambitions to see the industry thrive."

# Introduction

"From April to September 2025, we continued to turn our ambition into action – strengthening Scotland's position as the choice for premium red meat while delivering real value for levy payers, QMS members and the wider supply chain.

This period marked a step-change from laying strong foundations to building momentum across our five-year Strategy to 2028. With our organisational structure firmly embedded, the focus has been on impact: driving demand for our Scotch and Specially Selected brands, supporting productivity and profitability on farm and beyond, and building confidence in Scotland's red meat sector at home and internationally.

Being here for levy payers and members remains at the heart of what we do. That means providing trusted evidence, practical support and strong advocacy, while clearly demonstrating how QMS activity contributes to commercial success, industry confidence and positive public perception. These impact summaries are part of that commitment – offering regular, transparent updates on how our work is making a difference across the sector.

Between April and September 2025, we delivered progress across all pillars of our strategy. From record export growth and strengthened quality assurance, to high-impact consumer campaigns building brand recognition and trust with millions, expanded engagement with schools and communities, and continued momentum in Monitor Farm Scotland

and innovation projects, this report highlights just some of the ways we are supporting a resilient, sustainable and profitable future for Scottish red meat.

A major focus during the first half of the year was the launch of phase one of Meating Our Potential – our high-impact awareness campaign delivered in partnership with the Scottish Red Meat Resilience Group. Designed to highlight the significant economic opportunity from growing domestic beef supply, the campaign successfully brought together industry, political leaders across Scottish and UK Governments and the public behind a shared ambition for Scotland's beef sector. Activity gained strong momentum around Beeftech and the Royal Highland Show, generating extensive national and trade media coverage, high-profile political engagement, including a firm Scottish Government commitment not to have a livestock reduction policy, and widespread industry advocacy – clearly demonstrating the scale of support for backing locally produced, sustainable Scottish red meat.

The momentum built during this period gives us confidence as we continue working with the whole Scottish red meat supply chain, political decision makers and partners to realise our shared ambition for Scotland's red meat sector. "

**Sarah Millar**  
Chief Executive, QMS

## WHERE WE ARE IN OUR 5-YEAR STRATEGY:

April 2024

March 2029

30%

18 months

60 months

**This instalment covers the first half of 2025/26 (April–September 2025). Highlights include:**

- Delivered record export growth, with Scottish red meat exports reaching £164m, up 19% in value and 4% in volume, strengthening Scotland's position in key EU markets.
- Launched the high-impact Meating Our Potential campaign, in partnership with the Scottish Red Meat Resilience Group, to demonstrate the £281m economic opportunity from growing domestic beef supply. Phase one activity built strong political, industry and public backing through robust economic modelling, headline-grabbing national and trade media coverage (over 3 million opportunities to see), a public pledge signed by 30 key stakeholders including 11 MSPs/MPs, and a dedicated digital hub launched at Beeftech supporting herd growth with practical tools, case studies and partner advocacy.
- Reached millions of consumers through high-impact marketing, with the When You Know, You Know summer campaign delivering nearly 30 million impressions, alongside always-on social activity generating a further 3.7 million impressions.
- Strengthened trust and recognition in the Scotch and Specially Selected brands, with independent research showing 88% logo awareness for Scotch

Beef and Scotch Lamb, 61% for Specially Selected Pork, and 34% of shoppers are now actively looking for quality assurance markers when buying red meat.

- Modernised Quality Assurance while maintaining rigour, delivering a 15% reduction in standard content, launching the new QMS Traceability Checker in partnership with ScotEID, and marking 35 years of Quality Assurance.
- Supported productivity and profitability on farm, with 12 Monitor Farm Scotland meetings welcoming more than 500 attendees, and 80% of participants reporting improved business decision-making as a result.
- Engaged communities and built long-term confidence in red meat, reaching more than 13,000 pupils through nutrition education and cookery demonstrations, and seeing 300 schools apply to the Meat Voucher Scheme within its first two months.
- Delivered a high-profile presence at the Royal Highland Show, engaging stakeholders, levy payers and the public through QMS business breakfasts, the Food for Thought Theatre, RHET education activity, and partnerships with Aldi and Lidl, generating strong positive feedback across the supply chain.



# Progress on Strategic Indicators

PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
Provenance	% of total beef, lamb and pork on shelves under the Scotch or Specially Selected Pork brand.	This is tracked monthly through Retail Sales Solutions (RSS) audits. As of January 2026, there was: <ul style="list-style-type: none"><li>55.7% Scotch Beef</li><li>26.1% Scotch Lamb</li><li>8.7% Specially Selected Pork (SSP)</li></ul>	<b>PR Activity and Influencer Highlights:</b> <ul style="list-style-type: none"><li>BBQ Influencer Masterclass – inviting a selected list of influencers to learn about the brands and all things BBQ from expert Bill Whelen. Activity delivered 7k media impressions and 89.4k social media reach through content shared by attendees.</li><li>Make it Scotch was the headline sponsor of the Cutting Room stage at the first-ever Scottish festival of cooking over fire, Meatopia. Influencers attended the event as guests of Make it Scotch, with content posted reaching an audience of 21.4k.</li><li>Oasis – sausage roll sampling outside Murrayfield before Oasis performed secured eight pieces of press coverage, delivering 48.4 million impressions.</li><li>Summer influencers – collaborations with Lauren's Cravings, Margi Eats Edinburgh and Good Scrans Only achieved 33.6k views and over 600 post interactions.</li></ul> <b>Scotch Butchers Club:</b> <ul style="list-style-type: none"><li>BBQ leaflet delivered to members of the Scotch Butchers Club in May.</li><li>Social media adverts focused on buying the brands at your local butchers delivered 3.7 million impressions and 2.6k link clicks to the "Find your local butcher" directory on makeitscotch.com.</li></ul> <b>When You Know, You Know Summer Seasonal Campaign:</b> Launched on 14 July and ran for five weeks across: <ul style="list-style-type: none"><li>STV and STV Player – featuring our brand story and cattle and sheep farmers Jennifer and John Struthers.</li><li>STV, STV Player and Sky Regional – featuring the original When You Know, You Know TV advert.</li><li>Audio streaming – 30-second advert across digital audio platforms and podcast services.</li><li>Mobsta – digital advertising platform targeting shoppers within proximity of retailers and butchers.</li></ul>
	Consumer brand awareness, brand perception and propensity to purchase.	Independent research from our brand health tracker via YouGov shows logo awareness for Scotch Beef and Scotch Lamb at 88% (78% in Jan 24 when metrics were rebased) and for Specially Selected Pork at 61% (35% in Jan 24).  As a result of seeing the When You Know, You Know campaign 34% of shoppers said they will look for markers of quality assurance on their purchases (26% in Sep 24).  All metrics have seen positive gains across the year, including being seen as a brand consumers can trust, sitting at 87% for Scotch Beef and Scotch Lamb and 65% for Specially Selected Pork. Recognition of the brands being high quality sits at 69% for Specially Selected Pork and 86% for Scotch Beef and Scotch Lamb.	
	An increased proportion of lamb reared in Scotland will be processed in Scotland.	This will be tracked annually – 2024 figure: Estimated 36.2% of Scottish-born lambs slaughtered in Scotland, up from an estimated 34.9% in 2023.	

PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
Provenance (cont.)	% of total livestock population covered by Quality Assurance.	This will be tracked annually – 2025 figure: 95.1% of prime cattle and 90.7% of prime lambs and hogs.	<ul style="list-style-type: none"><li>Meta and YouTube – mix of creatives inspiring audiences with summer recipes.</li><li>Campaign delivered nearly 30 million impressions.</li></ul> <b>When You Know, You Know Autumn Seasonal Campaign:</b> September activity featured: <ul style="list-style-type: none"><li>Meta, YouTube and Mobsta.</li><li>Premium native article on The Times online featuring contributions from the Struthers family and butcher Hayley Glen.</li><li>TV advertising within STV's Sustainable Scotland Week programming.</li></ul> <b>Boosted Social Media:</b> <ul style="list-style-type: none"><li>Always-on social media activity across Facebook, Instagram and TikTok delivered 3.7 million impressions to targeted audiences.</li></ul> <b>Quality Assurance Activity:</b> <ul style="list-style-type: none"><li>Latest review of the Cattle and Sheep Assurance Scheme Standards delivered one of the most significant updates in years. Coming into effect on 1 January 2026, the revised standards feature a 15% reduction in content through streamlining and removing duplication, without compromising rigour.</li><li>Launch of the new QMS Traceability Checker, developed in partnership with ScotEID. Replacing the older PGI Checker, the system is web-based, refreshed daily and works across all devices, providing faster and more reliable access to accurate data.</li><li>Celebrated 35 years of Quality Assurance in September 2025.</li><li>Pig Assurance Scheme standards review underway, with benchmarking exercise completed in July; consultation open until 31 October.</li><li>Marketing to Members campaign saw the team attend auction markets across Scotland, promoting the brands, engaging with members and attracting new scheme members.</li></ul>

When You Know, You Know summer campaign achieved nearly 30 MILLION impressions

Oasis Specially Selected Pork sausage roll sampling at Murrayfield delivered 48.4 MILLION impressions





EU markets  
accounted for over  
99% of beef and  
lamb exports and  
98% of total  
export sales

Phase one of  
ENVIRONMENTAL  
BASELINING PILOT  
almost complete

PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
Productivity & Profitability	A greater proportion of output going to export markets.	QMS annual export survey revealed a record export climb to £164m; up 19% in value with volumes 4% higher.	<b>Exports:</b> <ul style="list-style-type: none"><li>• EU markets accounted for over 99% of beef and lamb export revenues and 98% of total export sales.</li><li>• Top five export markets by value: France; Netherlands; Germany; Italy; Belgium.</li></ul> <b>Monitor Farms Scotland:</b> <ul style="list-style-type: none"><li>• 12 open meetings with 515 attendees.</li><li>• 11 podcast episodes with 3,402 total downloads.</li><li>• 12 videos with 1,791 YouTube views and 97.4 hours watch time.</li></ul>
	Increase in partnership projects and 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.	<ul style="list-style-type: none"><li>• Published a comprehensive innovation project overview highlighting each project and providing farmers with data, practical tools and proven approaches to support informed decision-making and sustainable progress.</li></ul>
	Increase in total output sold to independent retail.	The estimated share of red meat processing turnover rose from 7.1% in 2022 to 7.7% in 2023, then 8.3% in 2024, based on the processor survey (N.B. includes estimates for non-response).	<ul style="list-style-type: none"><li>• Almost 99% of surveyed farmers plan to attend future meetings.</li><li>• 88% of attendees reported improved technical knowledge.</li><li>• 80% of attendees said the programme will improve their business decision-making.</li><li>• 60+ project collaborators.</li></ul>
	Increased output from breeding herds and flock.	Based on June census results and calf registrations data up to November 2025, calving rates have continued to trend higher. Some of this may reflect lower mortality in spring 2025. On a three-year average basis (2023-25), calving rates have risen 4.0% over five years and 5.2% over ten years (cattle aged under 12 months in June relative to total beef and dairy cows in June). Lambing rates also edged higher in June 2025, but the lambs-to-ewes ratio remained below its 2020-22 peak. Nevertheless, on a 3-year average basis, lambing rates were up 1.1% over five years and 4.2% over ten years.	<b>Farm Initiatives:</b> <ul style="list-style-type: none"><li>• Environment Baselineing Project completed over 90% of phase one on-farm work, including light detection and ranging (LiDAR), soil sampling and soil analysis.</li><li>• Data analysis will begin once full data collection is complete across 35 Scottish farms and 22 QMS farms.</li><li>• CT scanning completed on 123 performance-recorded rams, with genotypes collected to strengthen understanding of sheep performance and resilience.</li></ul>

PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
Productivity & Profitability (cont.)	Increased engagement with on farm initiatives such as Monitor Farm and Meat the Market.	Another successful year of Monitor Farm meetings has taken place, welcoming over 500 attendees on farm gathering very positive feedback. The MF Podcast continues to grow, with 2,400 downloads this year. Our Innovation projects and Management Accounting Guides have also been published.  Three Meat the Market workshops and a Building Better Beef Day have also been held, providing technical input to producers.	<b>Processor Engagement:</b> <ul style="list-style-type: none"><li>• Supported all private kill processors as part of the ScotGov small producers group funding.</li><li>• Delivered a Scotch Beef showcase in Holland with an exporting processor.</li><li>• Hosted a pork showcase for butchers.</li><li>• Explored China market opportunities with SDI and a processor.</li></ul> <b>Scotch Butchers &amp; Beef Club:</b> <ul style="list-style-type: none"><li>• Turnberry Resort Beef Club PR event with farmers and supply chain partners.</li><li>• Scottish Young Chef of the Year Oliver Redgwell-Welch placement at The Ritz, including visits to kitchens at Claridge's and The Dorchester.</li></ul>
	Increase in partnership projects with processors.	During the period we collaborated and engaged with processors and wholesalers on 38 different projects.	<ul style="list-style-type: none"><li>• Butchers and Chefs value-added event featuring Scotch Beef, Scotch Lamb and Specially Selected Pork.</li><li>• Knowledge transfer day for Butchers and Beef Club members held at Lanark Market.</li><li>• Butchers Business Club inward mission with 12 independent butchers, converting five to new Scotch Beef customers.</li><li>• BBQ value-added butchery demonstration delivered for influencers.</li><li>• Butchery demonstration delivered at BeefTech.</li></ul>



“Meating Our Potential is a great example of what clear, collaborative industry messaging can look like.”

- Ashley Gray,  
Global Meat Alliance, CEO

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.	<b>Community Engagement &amp; Reputation:</b> <ul style="list-style-type: none"><li>With support from the Make it Scotch ambassadors, between April and September, more than 13k pupils have been engaged across Scotland through our red meat nutrition sessions, cookery demonstrations and Eat to Compete initiative.</li><li>Extended Eat to Compete sessions to young women and girls, including an event at Stewartry Rugby Club (Castle Douglas), attended by over 120 players and their families, as well as Glasgow City Football Club (for academy girls with first team player appearances). Another Eat to Compete highlight was a session in partnership with RHET at Bell Baxter, where there were 300 pupils and appearances from professional rugby players, Jamie Ritchie and Marcus Bradbury.</li><li>Launched Meat Voucher Scheme with 300 schools applying within the first two months.</li><li>Developed a Reputation Strategy to 2028 to build on the outreach momentum, up-skill educators on the positive story of red meat, enhance the QMS Scotch Ambassador cohort, and engage career influencers as well as parents and carers on the benefits of quality red meat.</li></ul>
	Environmental progress is articulated and visible through our brands.	First year of five-year Environmental Baselineing Project in partnership with AHDB underway, which includes 22 Scottish livestock farms (20 beef and sheep, 2 pig). Includes net zero measurements through soil sampling, carbon audits and LiDAR scanning.	

PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
Planet & Place	Scottish public perception is favourable towards the Scottish red meat sector.	A baseline survey amongst a representative sample of Scottish adults was completed in January 2024, and the next survey was conducted around a year later, following the first phase of the When You Know, You Know consumer marketing campaign. This highlighted a positive shift in perception of the Scotch and Specially Selected brands, indicating national favourability across measures of quality, sustainability, value and trust.	<b>Proactive &amp; Reactive Red Meat Evidence &amp; Commentary:</b> <ul style="list-style-type: none"><li>Red Meat Industry Profile – developed and published a key annual statistical publication for the Scottish red meat sector and launched to 40 industry leaders at The Turriff Show.</li><li>Ongoing services from Market Intelligence, including monthly market updates, weekly price reports and regular commentary and briefings for stakeholders.</li><li>Our Chair and Chief Executive have featured on national and agriculture trade news, commenting on red meat hot topics such as Climate Change Committee carbon budget response, beef trends and prices, UK and EU trade and US trade and tariffs.</li></ul> <b>Environmental Baselineing Pilot:</b> <ul style="list-style-type: none"><li>Completed first year of five-year project aimed at better understanding the environmental impact of livestock farming in Great Britain. Significant progress has been made to set the baseline to track changes in greenhouse gas (GHG) emissions, collecting data on soil carbon and carbon removals and sequestration. In addition, most farms have had LiDAR scanning to measure above-ground carbon in trees and hedges, as well as carbon audits.</li></ul> <b>Events:</b> <ul style="list-style-type: none"><li>Royal Highland Show - really positive feedback from various stakeholders across our strong presence and activities, including QMS stand and business breakfasts, Food for Thought Theatre, RHET tent, Aldi and Lidl.</li></ul>

90% of people in Scotland say they would prefer to buy Scottish beef, pork and lamb, even if imports from elsewhere were 30% cheaper

More than 13K PUPILS engaged on benefits of red meat nutrition across Scotland





PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
People	Positive perception of QMS amongst stakeholders.	<p>The second meetings of the refreshed Industry Leadership Groups (Beef, Sheep, Pig and Climate and Nature) supporting cross-supply chain collaboration and strategic action have taken place. Objectives have been set, and work plans with unique programmes and activities for each of the species are being developed.</p> <p>Our cohort of more than 30 passionate Make it Scotch Ambassadors has been delivering nutrition sessions and cookery demonstrations to thousands of people across urban and rural communities in Scotland.</p>	<p><b>Meating Our Potential:</b></p> <p>We launched the high-impact Meating Our Potential campaign in partnership with the Scottish Red Meat Resilience Group to highlight the significant beef sector economic opportunity – £281m of output – from domestic supply and gather support. Phase one activity and results:</p> <p><b>Intelligence:</b></p> <ul style="list-style-type: none"><li>QMS beef sector economic modelling and paper briefed and presented to various industry and political stakeholders.</li><li>Commissioned a citizen survey which highlighted 90% of people in Scotland said they would prefer to buy Scottish beef, pork and lamb, even if imports from elsewhere were 30% cheaper.</li></ul> <p><b>Media:</b></p> <ul style="list-style-type: none"><li>Forum attended by five national and agricultural trade press journalists.</li><li>5 headline-grabbing press releases, such as ‘a couple more cows per herd is all it would take to meet our potential’ and ‘homegrown or handed away: let’s back local red meat over imports’.</li><li>Media coverage included 100% key message penetration, more than 3 million opportunities to see, and four broadcast interviews.</li><li>Campaign featured on the front page of both national and agriculture trade press (BBC Scotland and The Scottish Farmer).</li><li>Campaign featured across four podcast episodes – reaching over 1 million listeners.</li></ul> <p><b>Public affairs:</b></p> <ul style="list-style-type: none"><li>Created pledge to ‘Feed our growing nation with locally produced sustainable red meat’.</li><li>30 pledge signatories from key stakeholders, including 11 MSP/MPs – both UK and Scottish Government senior colleagues.</li></ul>
	Positive perception of QMS amongst levy payers.	QMS industry communication channels are well followed and engaged with. Including more than 30k combined social media followers with a very good average engagement rate, 6k newsletter subscribers and 30k podcast downloads.	
	QMS is viewed by employees as a great place to work.	85% of employees agree QMS is a great place to work (employee engagement survey).	

PILLAR	INDICATOR	PROGRESS	IMPACT IN ACTION
People	Positive perception of QMS amongst decision makers.	The refreshed External Affairs Strategy has been developed, and implementation with policy makers and political stakeholders has commenced. This includes a series of on-farm strategic engagement events with the Scottish Red Meat Resilience Group.	<p><b>Digital:</b></p> <ul style="list-style-type: none"><li>Meating our Potential webpage launched at Beeftech as a key industry hub to support herd growth, which includes a practical producer toolkit with signposting and case studies.</li><li>Social media toolkit created for partners to spread the word and demonstrate advocacy online. Overall reach across all campaign social media posts is 153k, with a very good 5% engagement rate.</li></ul> <p><b>Industry Strategy:</b></p> <ul style="list-style-type: none"><li>Meetings held across our action-focused committees, including the Scottish Red Meat Resilience Group and four industry leadership groups (Sheep, Pig, Beef, Climate and Nature). Operational progress made through drafting objectives and work programmes.</li></ul> <p><b>Political:</b></p> <ul style="list-style-type: none"><li>Presence at the Scotland Food and Drink Showcase event at Dover House, promoting the importance of Scottish produce.</li><li>14 MSP and MP meetings held.</li><li>7 consultation responses between April and September on both devolved and reserved issues, including international trade, internal market, climate change and Good Food Nation plan.</li></ul>



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# Impact Summary

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